

WOMEN IN PORTFOLIO MANAGEMENT ENHANCING DIVERSITY IN ASSET MANAGEMENT

Despite recent industry focus on Diversity, Equity & Inclusion (DE&I), women remain significantly under-represented in senior portfolio management positions.

In the third of our Women In Portfolio Management series we welcome female investment leaders to investigate.

Emily Chew of **Morgan Stanley Investment Management** responsible investment affiliate, **Calvert Research & Management** will present on the benefits of investing in companies with leadership in DE&I and explain how they have put this into practice in developing the Calvert Sustainable Diversity, Equity and Inclusion Fund.

Our panel of female investment leaders from leading investment consultants' Aon and WTW will discuss their journey and experiences in working and progressing in the industry and set out the work their organisations are doing to enhance diversity in their businesses and in the manager research they undertake



Emily Chew - Calvert
Research & Management
(an MSIM affiliate)
*Chief Responsible
Investment Officer*



Geri McMahon - Aon
*Co-Head of Responsible
Investment*



Rima Sen - WTW
*Director - Credit Manager
Research & DEI Lead*



Matt Johnston CFA
the Virtual Panel

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Emily Chew
*Executive Vice
 President &
 Chief Responsible
 Investment Officer*



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Emily Chew is Executive Vice President and Chief Responsible Investment Officer, Calvert Research and Management, an affiliate of Morgan Stanley Investment Management (MSIM), the asset management division of Morgan Stanley.

Emily is responsible for overseeing Calvert’s Research and Engagement departments and works to develop and support Calvert’s strategies in data and technology, client solutions, thought leadership, and product development execution. She co-chairs the MSIM Sustainability Council, and previously served as Global Head of Sustainability for Investment Management. Before joining Morgan Stanley in 2020, Emily was Global Head of ESG Research and Integration for Manulife Investment Management in Hong Kong and Boston, where she built an ESG investing program for public markets investments encompassing research, investee stewardship, thought leadership and thematic product development. Previously, she was Head of Asia-Pacific ESG Research for MSCI Inc. Emily is a member of the CFA Institute ESG Technical Committee that launched a new global ESG disclosure standard for investment funds in 2021. She has also served as rotating chair of the Steering Committee of the Climate Action 100+ investor engagement initiative and chair of the Asian Investor Group on Climate Change.

Emily holds an MBA from the University of Oxford, and Bachelors of Laws and Arts (honours) from the University of Melbourne.

Geri McMahon is Co-Head of Responsible Investment at Aon, having joined in 2018 following a career break. Geri leads Aon's strategy and policy on Responsible Investment, along with the development and sales of Aon's Responsible Investment fund solutions. This includes Aon's flagship Global Equity Impact strategy, which positively aligns capital towards the Sustainable Development Goals, and the Sustainable Multi-Asset Credit strategy, which re-thinks credit allocations for investors. Alongside this, Geri is a founding member of Aon's Retirement & Investment Diversity, Equity and Inclusion group, and is an ardent supporter of improving DE&I outcomes across Aon and the wider financial industry.



Geri McMahon
Co-Head of Responsible Investment

Geri retains a truly global perspective in her investment thinking and approach: she is proudly Chinese and Australian, and has lived in Hong Kong, Beijing and Sydney. Having previously spent four years as a fixed income trader with RBS in Sydney, Geri relocated to London in 2010 and joined Bank of America Merrill Lynch, before taking on the role of MD at a healthcare technology start-up prior to joining Aon. She lives in London with her husband and two young sons.



Rima Sen
*Director - Credit
Manager Research,
DEI Lead*

Rima Sen is a Director within Manager Research, focusing on liquid strategies across traditional and alternative credit. She leads on Emerging Market Debt research within the team. Rima also leads the Inclusion & Diversity working group in Manager Research and sits on the Investment Committee for the Towers Watson Alternative Credit Fund.

Rima previously worked at KPMG Investment Advisory (now Isio), splitting her time between client consulting and manager research. Prior to this, she was a Policy Analyst at HM Treasury and an Investment Strategist at Barclays Wealth and Investment Management. Rima studied Government and Economics at the London School of Economics and is a Chartered Financial Analyst (CFA) charterholder.

