

A vibrant purple background featuring a central green and blue globe. The globe is encircled by a ring of colorful, stylized skyscrapers in shades of blue, green, red, and orange. Above the globe, a red biplane flies across a white banner. The entire scene is framed by a dashed white circle. The text "ANNUAL REVIEW 2016" is prominently displayed in white, bold, sans-serif capital letters across the center of the globe.

ANNUAL REVIEW 2016

INVESTMENT 2020
YOUR FUTURE IN FINANCE

FOREWORD



Nichola Pease –
Co-Founder and
Executive Chair



Andrew Formica –
Co-Founder and Non Executive Chair,
Chief Executive
of Henderson Global Investors

Investment2020 is four years old in March 2017. We are nearly at the 1000 trainee mark and have comfortably met our 'diversity' targets, including gender, ethnicity and the proportion from state schools.

Amongst our alumni, we are delighted to witness numerous high achievers already adding value for their employers. A high 72% of trainees and apprentices joining firms via Investment2020 are staying on in permanent roles.

Our scope to raise awareness of the industry and recruit from the grassroots level is breaking new ground, and in the summer we were delighted to receive an Investment Marketing Innovation Award from the key industry publication Investment Week. Our aim is to unify the industry behind our shared goal of demonstrating the real value the industry adds to society, raising the industry profile and promoting the range of opportunities the industry offers for young adults as they embark on their careers. We are also on the case helping firms consider apprenticeships, as well as our core trainee offer.

Nichola Pease & Andrew Formica

“ Without Investment2020 I don't think I would have been able to get into a career in the investment sector. The opportunities, insights and networks this scheme has opened for me have been invaluable. ”



Alumni trainee

WELCOME



Karis Stander –
Managing Director

Looking back at 2016, I am happy to report that growth continued apace and we have brought an even sharper focus to our key audiences and how we reach them.

School leaver applications up

We have strengthened the links with the 3,300 schools, colleges and universities we initially targeted, and this has resulted in a doubling of student registrations over the year, from 1,700 to 3,800. We have trebled the number of careers events from 15 in 2015 to a total of 47 in 2016 and the proportion of school leavers in our trainee cohort increased to half of the 220 total this year. Our statistics also show clearly that we are delivering “diversity” for our partner firms.

Digital marketing success

We have made significant strides in our digital marketing strategy and are further developing our website with new information to explain what investment management is all about. Our use of social media, combined with e-campaigns is giving us an increasingly strong presence. The number of visitors to our website has risen by 50% in the year. We have also produced a range of videos via our YouTube Channel where trainees describe their roles.

Campaign to showcase IT opportunities

We want to help our employers get ahead of the curve in the competition for talent. Our campaign to showcase IT opportunities in the industry started with a suite of technology trainee case study videos.

Developing apprenticeships’ standards for the investment sector

As employers’ interest in taking on apprentices increases, we are providing them with updates on the new levy funding process, standards and training, as well as giving them opportunities to develop and share good practice, through regular roundtables.

Networking, training and charity fund raising events

With our Employer Partners and within our wider investment community, we continue our successful training and networking events and embark on new ones. Our City Yacht Club Charity Sailing Regatta, which we ran for the third year and was sponsored by Investec Asset Management, in association with Columbia Threadneedle and Henderson Global Investors, topped last year’s total raised by quite a margin, reaching a final figure of £22,640. Meanwhile, 36 trainees in 8 teams were given a unique opportunity to enhance their planning and communication skills.

New employers joining

As each new employer joins us we are given a renewed opportunity to raise their profile and ours amongst potential new and talented recruits. This year we were delighted to be joined by Aviva Investors and GAM. The investment management sector is comparatively unknown and fragmented alongside more consumer-facing sectors, but Investment2020 gives firms a recognised platform to advertise a spectrum of fascinating roles.

Thanks to all our supporters and the home team

We owe a huge debt of gratitude to all those involved in Investment2020 who are so generous with their time, goodwill and overall contributions: the executive committee who offer unfailing support, our employer partners, my executive team, 2112 and Lansons for their skills and expertise and of course the Investment Association which continues to be such a committed advocate of Investment2020. We are also pleased to be part of a new industry initiative, the Diversity Project, which aligns with our own central goal of creating an inclusive culture.

The forthcoming year promises to be a fruitful time as we forge new charitable partnerships and encourage our alumni and trainees to be ambassadors in their schools, colleges and universities. Underpinning all this is our relentless push to increase the awareness of the investment industry among young people as an exciting and interesting place to come and shape a career.

Sincerely,

Karis

2016 KEY STATISTICS

90%

FROM
STATE SCHOOL
EDUCATION

966

TRAINEES SINCE
LAUNCH

MALE
63%
FEMALE
37%

SCHOOL LEAVERS

49%

GRADUATES

51%

57%

OF GRADS 1ST
IN FAMILY TO GO
TO UNI

60%

OF GRADS
STUDIED NON-CORE
SUBJECTS

41%

OF TRAINEES
ARE BAME

72%

TRAINEES EMPLOYED
PERMANENTLY BY
SPONSOR FIRM

REACH INTO OVER

3,300

SCHOOLS,
COLLEGES &
UNIVERSITIES

TRAINING AND EDUCATION EVENTS 2016

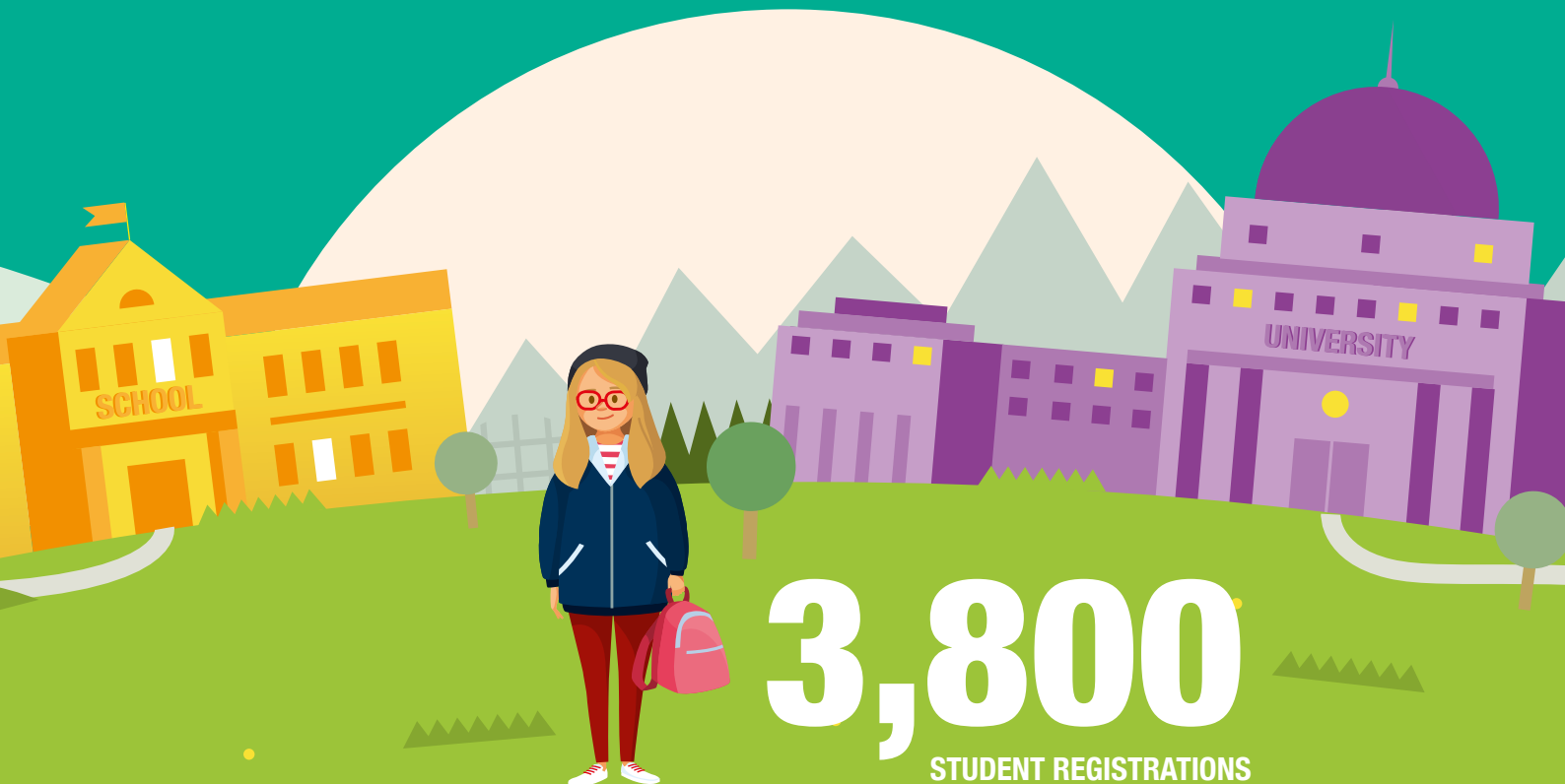
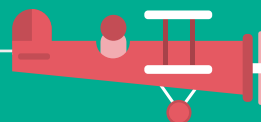
Date(s)	Event	Host	Speakers
14/01/16	Course: Topical Perspectives of Investment Management	Wentworth Advisors	Jane Vessey, Wentworth Advisors
14/01/16	Course: Topical Perspectives of Investment Management	Wentworth Advisors	Jane Vessey, Wentworth Advisors
25/02/2016	Industry Insight Day	Investment2020	Steve Rorke, Head of Asset Servicing, Schroders Honor Solomon, Head of Retail Distribution, LGIM Alex Hamilton, Head of Digital & Web Analytics, Fidelity
14/03/16	Industry Insight Day	Investment2020	Campbell Fleming, CEO of Columbia Threadneedle Investments Olly Harris, CEO of Resource Solutions Panel – Robert Walters & Resource Solutions
21/04/16	Course: Introduction to Financial Markets: Economics	BG Consulting	Russell Hammerson, BG Consulting
16/05/2016	Industry Insight Day	Investment2020	Andrew Formica, CEO Henderson Global Investors Sarah-Jane Dennis, Head of Business Analysis, OMGI Chris Turpin, Regional Managing Director EMEA, First State Investments
08/06/16	Course: Introduction to Financial Markets: Economics	BG Consulting	Russell Hammerson, BG Consulting
30/06/2016	Scotland Industry Insight Day	Investment2020	Fionna Ross, Senior Analyst, Aberdeen Asset Management Adrian White, European Financial Controller, Franklin Templeton Investments Morven Campbell, Head of Fund Accounting, BNP Paribas
12/09/16	Campus to Corporate	Kaplan	Simon Taylor, Kaplan Donna Jarvis, Kaplan
21/09/2016	Alumni Event	Investment2020	Alumni Event Nichola Pease, Investment2020 co-founder Andrew Formica, CEO Henderson Global Investors & Investment2020 co-founder Vanessa Vallely, Managing Director, We are the City Ella Brown, Alumni Trainee, Schroders Callum Hendshaw, Alumni Trainee, M&G Investments
12/10/2016	Industry Insight Day	Investment2020	Nicholas Tilley, Executive Director, JP Morgan Asset Management Louise Hosking, Chief of Staff, Schroders Mitesh Sheth, CEO Redington
03/11/2016	Training to Deliver Career Pathway Masterclasses	Investment2020	Investment2020 & Career Ready
10/11/2016	Course: Introduction to Investment Management including a trade simulation	Fitch Learning	Brendan McLaughlin, Fitch Learning Rob Thakur, Fitch Learning
13/11/2016	Capital Markets Introduction	Kaplan	Jeremy Smith, Kaplan
6/12/2016	Course: Introduction to Financial Markets: Economics	BG Consulting	Russell Hammerson, BG Consulting
7/12/2016	Course: Introduction to Financial Markets: Economics	BG Consulting	Russell Hammerson, BG Consulting

BRINGING OUR AUDIENCES INTO SHARPER FOCUS

Many young people have a fundamental lack of awareness about the investment industry, its place as a separate entity within the world of financial services, and the huge range of opportunities that it offers. This is a barrier that Investment2020's work is helping to break down with all of our literature, our active digital presence and targeted careers outreach.

3,300

SCHOOLS, COLLEGES, UNIVERSITIES

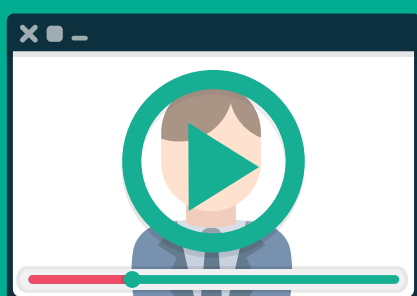


3,800

STUDENT REGISTRATIONS

29

EMPLOYER FIRMS



21

YouTube
VIDEOS



EVENTS AND

STUDENT CAREERS AWARENESS EVENTS



Careers event for advisers and teachers London – Schroders

“ It was inspiring to have careers events for students like me take place at very prestigious asset management firms and to meet some top professionals who are prepared to give up their time to talk to us! ”



Student careers insight event – Standard Life Investments, Edinburgh

“ I wanted to thank you for the valuable insights you provided us and for all your support and advice. It was an amazing learning experience, and I feel very fortunate that I could be part of the careers event. ”



Student careers insight event London – JP Morgan Asset Management

TRAINEE EVENTS



Trainees at Schroders

“ A valuable stepping stone into the financial industry, which may have otherwise not been possible. ”

FEEDBACK



Trainee Forum, Rose from M&G, London



Alumni Event, Ella from Schroders, London



Personal Branding Trainee Event, London

CITY YACHT CLUB REGATTA 2016

Our City Yacht Club Charity Sailing Regatta, which we ran for the third year and was sponsored by Investec Asset Management, in association with Columbia Threadneedle and Henderson Global Investors, topped last year's total raised by quite a margin, reaching a final figure of £22,640.

Meanwhile, 36 trainees in 8 teams were given a unique opportunity to enhance their planning and communication skills. Teams were made up from Schroders, JP Morgan Asset Management, IFDS, Standard Life Investments, Aberdeen and the three sponsor firms.



“Investment2020 is doing some wonderful work with our talent of the future and in my view, helping them to master the skills.”

Richard Lord
Standard Life Investments



EXECUTIVE COMMITTEE

Nichola Pease

Co-Founder and Executive Chair

Andrew Formica

Co-Founder and Non Executive Chair,
Chief Executive of Henderson Global Investors

Chris Cummings

Chief Executive of the Investment Association

Gwyneth Hamand

Learning Consultant for Enfield School
Improvement Service

Louise Hosking

Chief of Staff for Schroders

Anne-Marie McConnon

Head of Marketing EMEA for BNY Mellon
Investment Management

Richard Miles

Director of Group Corporate Communications
for M&G Investments

Victoria Nye

Investment2020 Consultant

Karis Stander

Managing Director

EMPLOYER PARTNERS

Aberdeen

architax

ARTEMIS
The Power Hunter

AVIVA
INVESTORS

BMO Global Asset Management

BNP PARIBAS
SECURITIES SERVICES

CFA Society
United Kingdom

COLUMBIA
THREADNEEDLE
INVESTMENTS

Fidelity
INTERNATIONAL

First State
Investments

FRANKLIN TEMPLETON
INVESTMENTS

GAM

Henderson
GLOBAL INVESTORS

INTERNATIONAL FINANCIAL
DATA SERVICES

Invesco
Perpetual

Investec
Asset Management

JO Hambro
Capital Management Group

J.P.Morgan
Asset Management

JUPITER

KAMES
CAPITAL

Legal &
General
INVESTMENT MANAGEMENT

M&G
INVESTMENTS

MOUNTSTONE
PARTNERS

OLD MUTUAL
GLOBAL INVESTORS

QUILTER CHEVIOT
INVESTMENT MANAGEMENT

RECORD

REDINGTON

Schroders

Standard Life
Investments

Supported by

THE
INVESTMENT
ASSOCIATION

F T I
CONSULTING

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INVESTMENT 2020

YOUR FUTURE IN FINANCE

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