

Speaker biographies



Helena Morrissey

Helena joined Newton in 1994 and was made Chief executive officer in July 2001. Prior to this appointment, she was Head of fixed-income, managing a number of specialist global bond funds and responsible for the bond element of multi-asset portfolios. She remains on Newton's Investment Committee. Helena is a Director of the Investment Management Association and sits on the FSA's Practitioner Panel, a statutory body representing the interests of the financial services industry in the UK regulatory framework. Helena is a graduate of Cambridge University and holds an MA in Philosophy.



Jeff Munroe

Jeff joined Newton in 1992, and was appointed as Chief investment officer in 2001. As CIO, Jeff is responsible for the effective functioning of Newton's investment process. Jeff chairs the Investment Committee which acts as guardian of Newton's investment philosophy and culture. Jeff is also a member of various Newton strategy and management groups. As a portfolio manager, Jeff specialises in global equity and global multi-asset mandates including managing two local authority portfolios. Jeff's professional qualifications include being a Chartered Financial Analyst (CFA) and a member of The UK Society of Investment Professionals. He is a Director and member of the Newton Board as well as the Newton Executive.



Iain Stewart

Iain joined Newton in 1985 as a portfolio manager. He is a senior member of our Strategy Team with particular responsibility for co-ordinating the development of our global investment themes. He is also a member of the Newton Executive and Investment Committee. He has worked for Newton for 22 years and during this time has specialised in managing multi-asset and global equity mandates for pension fund clients. Iain currently manages a range of Newton's pooled balanced funds as well as our active absolute return strategy. Since 1992 he has been the manager of the Newton Exempt Fund (Newton's strongly performing flagship pooled balanced fund). Iain graduated from Aberdeen University and has a PhD from UEA as a result of research with the Ministry of Agriculture, Fisheries and Food.



Simon Pryke

Simon joined Newton in 1996 after post-graduate studies at Oxford University. For the past 12 years he has been a global analyst responsible for the financial sectors with a particular focus on bank stocks. Simon has led the team of 18 global analysts since October 2003.



Sophia Whitbread

Sophia joined Newton in 2005 after reading Classics as both an undergraduate and postgraduate at Cambridge University. For the past three years she has been a global analyst responsible for the financial sectors, with a particular focus on Latin America, Russia and the Middle East. She has lead responsibility of the asset management sector.



Rob Marshall-Lee

After graduating from Durham University with a BSc (Hons) degree in Geology, Rob worked as a Chartered Accountant with the Deloitte & Touche Financial Services practice for four years before joining Newton in 1999 as a global analyst. He is currently fund manager of the Newton Overseas Equity Fund, among others, and the special situations analyst, with an aim of maximising the generation of investment ideas from Newton's thematic approach. Prior to this, he managed the Newton Income Fund and was a global analyst from mid 1999 to end 2005 with responsibilities over the period including the mining, paper, steel, tobacco and utility sectors. He is also a member of Newton's Macro Strategy Group.

Speaker biographies (continued)



Robert Canepa-Anson

Robert gained experience of financial and valuation issues while working at Arthur Andersen, following the completion of his MPhil degree. When Andersen UK joined Deloitte, he joined the corporate finance practice specialising in business modelling for valuation and decision processes. At Deloitte, Robert qualified as a chartered accountant. He joined Newton as a global analyst in 2004. Robert's responsibilities cover the utilities, chemicals and paper sectors.



Charles Whall

Following 19 years in the oil and gas industry, Charles joined Newton in 2000 as a global analyst with responsibility for the oil and gas sector. Charles commenced his career with Britoil, working at the 'sharp end', managing drilling and offshore operations, then moved on to ARCO where he managed field development projects. Charles used his MBA as a stepping stone to business planning and commercial roles, ultimately running ARCO's European natural gas supply and marketing business. Following the acquisition of ARCO by BP, Charles led the integration project to bring together the two gas marketing and trading businesses for Europe. Since joining Newton, Charles has used his industry experience and enthusiasm to broaden the portfolio of companies that is followed, with a particular emphasis in emerging markets.



Paul Brain

Paul joined the investment industry in 1984 and now has 24 years' experience managing complex fixed-income portfolios. He has held a number of senior fixed-income positions within the industry which gives him a wide breadth of knowledge and experience. His early career was spent investing in high grade bonds with Credit Suisse and Barings. As head of retail fixed-income at Investec Guinness Flight, Paul led the team that won the International Money Marketing "Fixed Interest Manager of the Year" in 2000. He joined Newton in 2004 as a member of the fixed-income team and runs the Global Dynamic and Corporate Bond Funds. Paul is a well known speaker and commentator on the financial markets.



James Harries

James graduated from Bristol University in 1994 with a BSc in Politics. After a year of military service he joined Newton working in the Private Investment Management department as a portfolio manager. During this time he was responsible for a wide range of clients and managed the Newton Falcon Fund. In 2004 James moved to Veritas Asset Management to establish and manage a global income fund as well as managing a range of other clients. He rejoined Newton in 2005 as a global equity manager. James gained a Masters Degree in Finance from the London Business School in 2004.



Jason Pidcock

Jason runs the Asia Pacific ex Japan team and has 15 years' experience of investing in the region – four years of which have been with Newton. He has a solid performance track record and currently manages in excess of US\$3 billion in three Asia Pacific ex Japan funds. Jason began his career at Henderson Global Investors in 1993 and has also worked for BP Investment Management. His roles at Newton include advising the global teams on asset allocation and stock selection.



Guest speaker: Andrew Marr

Andrew is the host of the agenda-setting interview programme The Andrew Marr Show on BBC One. He also presents BBC Radio 4's Start The Week each Monday morning, and recently won a string of awards for writing and presenting Andrew Marr's History Of Modern Britain (BBC Two).

Andrew has a BA in English from Trinity Hall, Cambridge. He joined The Scotsman as a trainee and junior/business reporter in 1981 and became parliamentary correspondent in 1984 and political correspondent in 1986. He worked for two years at The Independent, then returned to The Scotsman as political editor in 1986. He moved to become political editor at The Economist from 1988 to 1992 and then returned to the Independent as chief political commentator in 1992 and was promoted to editor in 1996. He became a columnist for The Express and The Observer in 1998 before being appointed as BBC political editor in May 2000.

Andrew has had five books published: The Battle For Scotland (Penguin, 1992); Ruling Britannia (Penguin, 1996, 1998); The Day Britain Died (Profile, 2000); My Trade (Macmillan, 2004); and A History Of Modern Britain (2007).

He has received more than a dozen major awards for writing and broadcasting – including from BAFTA, the Royal Television Society and most recently the Broadcasting Press Guild.