



Co-hosted with Wellington Management

Rethinking core equity – in search of investment alpha

Today's equity landscape is shaped by concentrated index leadership, shifting factor regimes, and evolving client preferences between passive, quantitative, and fundamental approaches. In this session, Andrew Sharp-Paul will share a practical framework for identifying where active management can still add value, and how investors can unlock those opportunities through more deliberate portfolio design. We will discuss how "core equity" is being rethought, why blending styles can improve portfolio resilience, and how portfolio construction tools and techniques can help allocate active risk more effectively, while remaining mindful of governance and implementation constraints.

Moderator



Ms. Elaine WONG, CFA, CAIA
Wellington Management

Keynote Speaker



Mr. Andrew SHARP-PAUL
Wellington Management

Closing Remarks



Mr. Alfred LEE
HKRSA

Event details

Date & Time: **Wednesday, 22 July 2026 | 11:00 am – 12:00 noon**

Language & Fee: English | Free

Register: [Register here](#) or by scanning QR code
Participants will receive a confirmation email with the webinar link ONE DAY before the event.



Notes

- **CPD/CPT**: Employees of our corporate members may claim 1 hour (**non-core**) training time for CPD/CPT, subject to relevant body's approval.
- **Non-Members**: An attendance letter will be issued to non-members who attend the entire webinar and pay HKD350 after the session.
- **Corporate Members**: Please check the Corporate Member List on our website. Your company name must match exactly; otherwise, you will be treated as a non-member.
- **Individual Members**: Applies only to those already approved by HKRSA ExCom.
- **Login**: Use the same name and email as your HKRSA registration.
- **Virtual Platform**: Hosted on Wellington Management. Registration implies consent for HKRSA to share basic details including name, title, organisation and email address to Wellington Management for platform access.
- **Enquiries**: please contact us either at events@hkrsa.org.hk or (852) 2147 0090.

Event Programme

11:00 – 11:10

Opening Remarks
Ms. Elaine WONG, CFA, CAIA
Vice President, APAC Institutional Business – Hong Kong
Wellington Management

11:10 – 11:30

Keynote Speaker
Mr. Andrew SHARP-PAUL
Managing Director and Solutions Director
Wellington Management

11:30 – 11:55

Fireside Chat and Q&A
Mr. Andrew SHARP-PAUL
Moderator
Ms. Elaine WONG, CFA, CAIA

11:55 – 12:00

Closing Remarks
Mr. Alfred LEE
Vice Chairman of Executive Committee
Member of Business Strategy Sub-committee
HKRSA

Moderator & Opening Remarks



Ms. Elaine WONG, CFA, CAIA
Vice President, APAC Institutional Business – Hong Kong
Wellington Management

Elaine is responsible for developing and strengthening relationships with institutional clients based in Hong Kong and Macau, including official institutions, pensions, insurance companies, endowments, foundations, and family offices. She also leads various business development activities and consultant partnership and acts as a thought partner to clients. Her main responsibilities include actively engaging with clients to present the full suite of Wellington’s investment approaches, leading investment-related and market outlook discussions and recommending investment asset allocation.

Keynote & Fireside Chat Speaker



Mr. Andrew SHARP-PAUL
Managing Director and Solutions Director
Wellington Management

As Solutions Director, Andrew leads the development of client solutions and strategies in the Asia Pacific region. He works closely with our clients to understand their investment demands and deliver best in class investment solutions. To do this, he draws on Wellington Management’s investment capabilities across asset classes, deep market research, and the broader Wellington Solutions team. He is also a director of the Wellington Management Australia Board and Vice Chair of the APAC Risk Committee.

Closing Remarks



Mr. Alfred LEE
Vice Chairman of Executive Committee
Member of Business Strategy Sub-committee
HKRSA

Alfred Lee is the Managing Director and Head of Institutional Business, North Asia ex-China of Amundi Hong Kong, he responsible for the Institutional Business development in Korea, Taiwan, Hong Kong across all the investment strategies.

Alfred graduated from the University of Hong Kong, with honors, in Economics and Finance. Alfred is also a Chartered Financial Risk Manager.

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The Hong Kong Retirement Schemes Association (HKRSA) was established in 1996 to promote the interests and best practices of retirement schemes in Hong Kong including provident and pooled retirement funds. The HKRSA is a not-for-profit, non-political association, which represents retirement schemes and their members, providing a forum for discussion of issues of current and topical interest.



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