



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.

### Keynote Speaker



**Mr. Andrew SHARP-PAUL**  
Wellington Management

### Moderator



**Ms. Elaine WONG, CFA, CAIA**  
Wellington Management

### Closing Remarks



**Ms. Ka Shi LAU, BBS**  
The Hong Kong Retirement  
Schemes Association

### 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](mailto:events@hkrsa.org.hk) or (852) 2147 0090.

## Event Programme

3:00 – 3:10

### Opening Remarks

**Ms. Elaine WONG, CFA, CAIA**

Vice President, APAC Institutional Business – Hong Kong  
Wellington Management

3:10 – 3:30

### Keynote Speaker

**Mr. Andrew SHARP-PAUL**

Managing Director and Solutions Director  
Wellington Management

3:30 – 3:55

### Fireside Chat and Q&A

**Mr. Andrew SHARP-PAUL**

**Moderator**

**Ms. Elaine WONG, CFA, CAIA**

3:55 – 4:00

### Closing Remarks

**Ms. Ka Shi LAU, BBS**

Member of the Executive Committee & Cross Straits Forum Convenor  
The Hong Kong Retirement Schemes Association

## 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



**Ms. Ka Shi LAU, BBS**

Member of the Executive Committee & Cross Straits Forum Convenor  
The Hong Kong Retirement Schemes Association

Ms. Ka Shi Lau is Chairman of the Hong Kong Trustees' Association, Vice Chairman of the Asian Corporate Governance Association, and Independent Non-Executive Director of Citibank (Hong Kong) Limited as well as serving in Hospital Authority as Chair of MPFS Supervisory Committee, and Trustee Board Member of HA Charitable Foundation. She completed a distinguished 25-year career with BCT Group in 2024, serving as Managing Director & CEO for 22 years and Senior Advisor for 2 years, where she drove innovation and positioned BCT as a leader in pension and asset servicing.

Guided by a strong sense of purpose and commitment to the Greater Good, she actively contributes to public and professional bodies including the MPFA, SFC, Our Hong Kong Foundation, HKRSA, HKICPA, IFPHK, and Golden Age Foundation, and has held roles with Women's Commission, and Minimum Wage Commission, FSDC and CIIF. Recognized with the Bronze Bauhinia Star in 2013, she has received numerous accolades such as "Director of the Year Award," "Women of Influence – Professional of the Year," and multiple Lifetime Achievement Awards in pensions and finance.

Ms. Lau holds an MBA from Cornell University, a certificate in global finance leadership from CUHK, and is Honorary Fellow of HKS Institute, and Fellow of HKCGI (corporate governance). Beyond her professional achievements, she is also musically accomplished, serving as a pianist at church for many years.

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## About HKRSA

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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