



SUSTAINABILITY REPORT

2021

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ABOUT THIS REPORT

We believe sustainability is about making decisions that have a positive impact on the economy, society and the communities in which we live and operate. It's about engaging all our stakeholders, holding ourselves accountable and working together to continually improve.

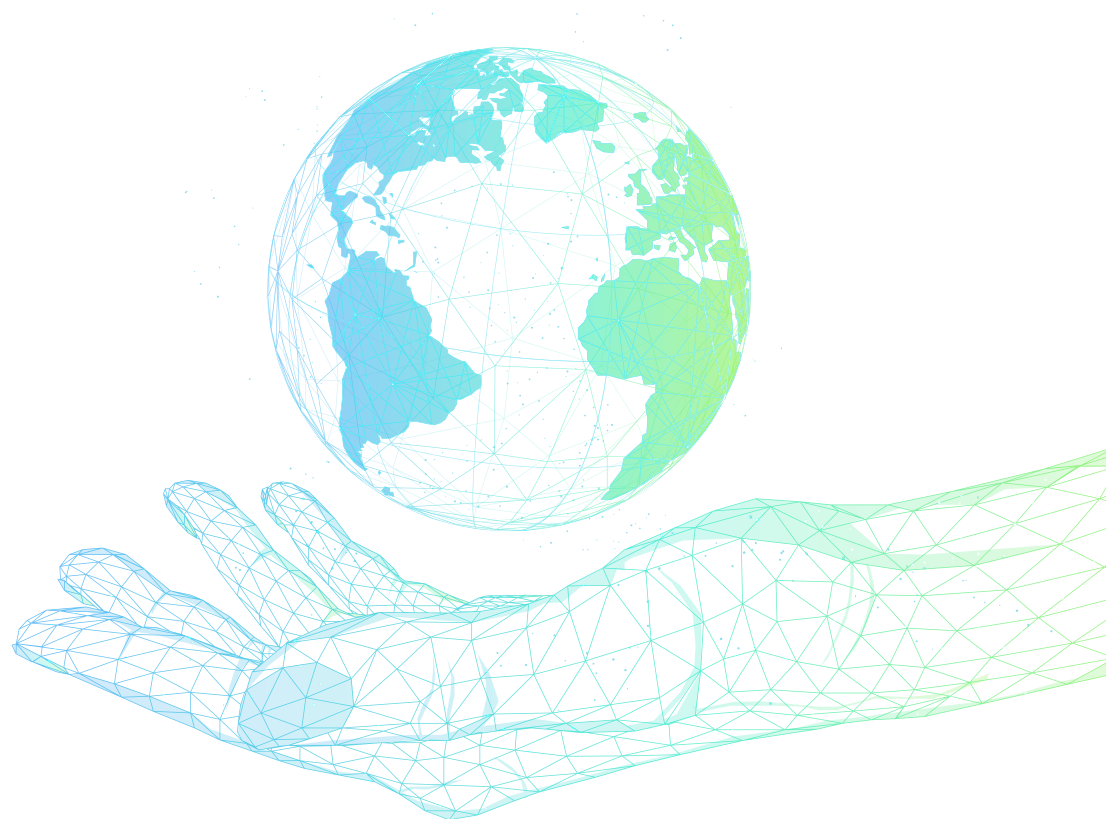
While this is the first sustainability report of its kind for FE fundinfo, we have for the past three years been working closely with Hg, our majority investor, to enhance our ESG approach. A leading investor in software and service companies, Hg has a dedicated ESG focus within its portfolio companies. Through collaboration across its network, and through its in-house ESG team, Hg continues to provide advice and guidance for ESG best practice and has developed sustainability frameworks and assessment mechanisms to track progress.

For this report, we have used this sustainability assessment framework to measure and track our sustainability progress. This covers in-depth questions about our governance and business essentials, our societal and environmental impact, and how we are caring for and engaging our employees. The result of the assessment helps give us a better understanding of key sustainability focus areas.

2021 represents a milestone for our sustainability journey as we delved deeper into the detail of how we stack up as an organisation. With the input of different stakeholder groups, we recognised that sustainability was already a significant factor in many of our operations and decisions but that we also wanted to:

- Create short, medium, and long-term plans and track our progress.
- Take a more targeted approach to our efforts.
- Share a clear message with our colleagues, customers, partners and investors.

This report shares highlights of our sustainability efforts up to the end of 2021 and captures some of our priorities for the year ahead.



MESSAGE FROM HAMISH PURDEY

As a leading fund data and technology company that sits at the heart of the investment industry, we at FE fundinfo pride ourselves on our expertise and consultancy when it comes to connecting thousands of asset managers, fund managers, distributors and financial advisers worldwide.

It is our mission to connect the investment industry and help inform better investment decisions by providing greater transparency in everything we do. Increasingly we have been working with our clients to provide data, insight and analysis into their own 'ESG' (Environmental, Social and Governance) impacts, so it seemed entirely apposite that we take a deep look at our own impacts on the economy, society and the communities which we seek to serve.

I'm delighted that we have made progress across every office of our global organisation in supporting our sustainability agenda. Be it our initiatives supporting employee wellbeing and engagement, our commitment to creating a diverse and inclusive culture across our business, or the steps we have been able to introduce to better understand our environmental impact and take control of our energy management over the past year: we want to share and celebrate where we have done well with our clients and stakeholders so they can be confident they are investing in an organisation that is serious about sustainability.

As part of our efforts for continuous improvement, this Sustainability Report is a chance for us to assess where we are and reflect on where further improvements can be made. It will be through the expertise and support of our clients, stakeholders and employees that we can make tangible differences and learn from best practices across the network of our investors Hg business practices.

We are confident that when it comes to putting together next year's Sustainability Report, we will have not only achieved the goals we have set out today, but also posed ourselves many more ambitious ones for the future.

Hamish Purdey

Chief Executive | FE fundinfo



OUR KEY DRIVERS

The interests of our investors

We complete an annual assessment set by our investors, Hg. In 2021, Hg became proud members of the ESG Data Convergence Project, which seeks to standardise ESG metrics and provide a mechanism for comparative reporting for the private market industry. Hg also became one of the first private equity firms to set carbon reduction targets approved by the Science-Based Targets initiative. We're pleased to have Hg's input and guidance in our own sustainability journey. In 2021, the assessment set by Hg contained over 100 questions across a wide range of ESG topics which provided a comprehensive framework for us to measure and understand our sustainability journey.

The interests of our customers

We recognise how our customers' interests in sustainability are evolving through the due diligence and request for proposal documents we receive - these inputs help to inform our evolution in sustainability.

The interests of our employees

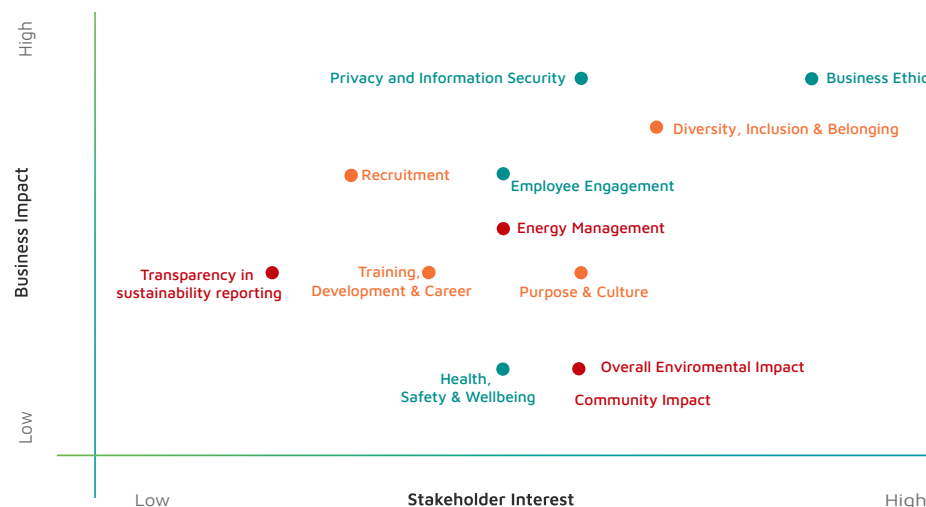
Our employee engagement surveys provide insights into what matters most to our colleagues. The results are shared and discussed in smaller focus groups to expand understanding on the ideas raised and drive results-oriented action.

Shortlisting high-priority material sustainability issues

Through the measures above we shortlisted key sustainability areas and identified those we believe require greatest attention, enabling us to direct our efforts to deliver the best possible outcomes based on our objectives. These have been mapped on the materiality matrix which shows the interests of our stakeholders against the business impact of each issue we are seeking to address. Each material issue is represented on the chart by a coloured dot.

Those in **green** indicate an area we believe we're currently strong in, those in **amber** represent areas we believe there is room for improvement and those in **red** indicate areas requiring the most attention.

FE fundinfo's Sustainability Materiality Matrix



This report highlights where and how we've been driving change through our sustainability initiatives up to the end of December 2021 for the material issues noted above.

We recognise the importance of the U.N. Sustainable Development Goals (SDG) in providing a framework for action to support the world's people and our planet, and that as an organisation we play a role in driving progress in multiple areas. Within this report we've included the relevant SDG icons where our efforts support progress for the relevant goals.

Our Commitment

Next year we plan to extend this materiality review exercise and engage further with our stakeholders through additional targeted discussions and surveys, to ensure we're identifying material issues of most importance and impact for our business. We're excited to be producing our first sustainability report and tracking our ongoing progress in the year ahead.

PURPOSE, CULTURE & BUSINESS ETHICS

Purpose

At FE fundinfo, we believe in making the fund ecosystem Better Connected and Better Informed. We give our clients and partners the confidence to make the best possible choices, by accessing accurate and timely information anywhere, at any time.

Through a combination of organic growth and growth through acquisition, we've been delighted to welcome many highly skilled professionals with valuable knowledge to the FE fundinfo group. Our significant growth has enabled us to leverage our strengths and serve our customers even better.



Culture

Our culture is centred around trust, being open to challenge and working together toward shared goals. At FE fundinfo we know we are better together, and that our combined knowledge, skills and behaviours create something far greater than the sum of their parts.

We were delighted that the results of our annual employee engagement survey reflected the impact of our continued efforts in building and maintaining our company culture. 87% of employees said they are proud to work for FE fundinfo and 89% agreed that the culture allows them to be themselves at work (results for same questions the prior year were 86% and 87% respectively).

In 2021 we identified more opportunities to unite through common causes, and:

- Embraced the addition of two employee-led action groups, our Gender Equality Group and our Environment Group, both comprising employees from across our global offices.
- Introduced our Community Day – a day for every employee to give back to the societies and environments we live and work in.
- Increased attention on health, wellbeing and charitable giving by introducing an app called Charity Miles – facilitating a way for us to get active and raise money for great causes simultaneously.

Business Ethics

Our Business Ethics are part of our DNA and the foundation for how we operate internally and with our external stakeholders. They detail our company values and culture, set standards and expectations for how we behave and guide our decision making. They form part of the induction of every employee into the business, are easily accessible on the company intranet and are reviewed and updated on an annual basis, and more frequently where required.

Our Commitment

We recognise the strength in our differences and the rich culture this engenders. We also recognise the challenges inorganic growth through acquisition presents as we look to merge and harmonise differing organisational cultures. We are committed to supporting all colleagues in feeling a sense of belonging, where their contribution matters and is counted. In 2022, we plan to build on the support for managers to integrate their teams and nurture them through championing employee voice.

SUSTAINABILITY THROUGH OUR PRODUCTS & SERVICES

In addition to sustainability being a core principle for how we operate as a business, it is central to many of our customer solutions. The ESG Product Group at FE fundinfo has been providing ESG reporting solutions for more than 10 years and is at the forefront of providing ESG transparency at a portfolio and fund level.

As the requirements for ESG investment reporting rapidly evolve, keeping abreast of the regulatory requirements for Fund Managers and Fund Distributors is a significant challenge.

The introduction of the Sustainable Finance Disclosure Regulation (SFDR), Taxonomy Regulation in 2021 in Europe, as well as other emerging regional reporting requirements, will impact existing regulations such as MiFID II, UCITS, AIFMD and IDD but also add further complexity to the ESG investing landscape.

We help customers navigate this complex regulatory framework and remain compliant in the promotion and distribution of ESG funds. Our team of specialists provide expertise and insights in ESG & SFDR reporting, the creation and dissemination of EET data and application for Ecolabels. We also support fund manufacturers and asset owners with their general ESG reporting, bringing sustainability considerations to the fore from an organisational and fund level, whilst engendering transparency for all stakeholders.

We also understand that we are in a unique position to ensure that ESG data is transmitted to investors as efficiently as possible to enable ESG considerations in the investment process. To that end, we actively seek participation in relevant ESG industry working groups such as TISA, the IA and FinDataEx - helping shape the future of how data is transferred and democratised - allowing greater accessibility to support investors at the point of fund research and selection.

**FE fundinfo helps
leading fund
managers and
asset owners
produce more
than 149,000
ESG documents
every year.**

Championing sustainable investments

Through FE Investments, we aim to be the top-managed portfolio service provider in the UK for sustainability. We are keen to make a difference and are proud to be members of:

- The UK Sustainable Investment and Finance Association to drive growth and new opportunities in the sustainable finance industry.
- The TNFD, (Taskforce on Nature-related Financial Disclosures) which provides a risk management and disclosure framework for us to report and act on nature-related risks.

In addition to being signatories to and members of sustainability groups, we embed our responsible approach into all areas of our investment process. We not only look at how our own processes approach sustainability, but actively engage with fund managers on issues where we believe our high standards are not being met, with the aim of improving the responsible outcome or removing them from our investment universe.

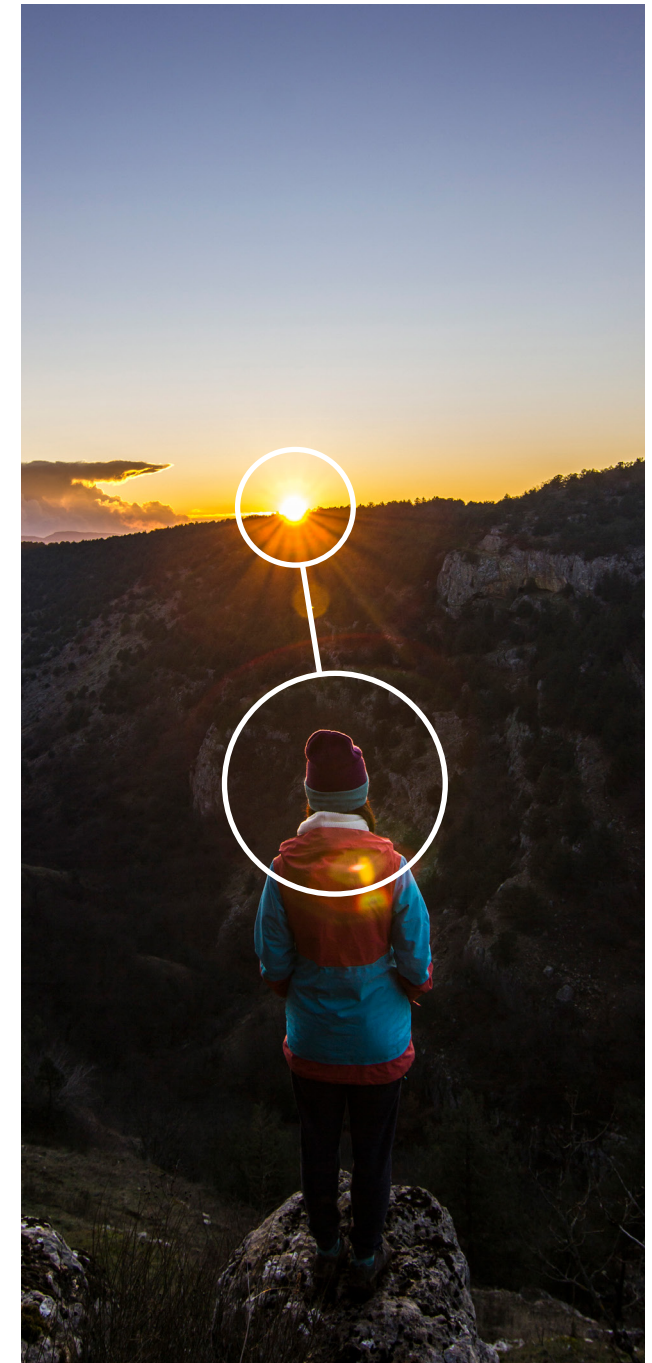
Our Commitment

We are a trusted partner to many product manufacturers and distributors in the investment industry - as such, we will continue to provide guidance to our clients to ensure compliance with the welcome regulations that aim to provide investors with transparency, ease of access to quality and accurate fund information, and prevent greenwashing practices in the rapidly expanding market of responsible investing.

We will continue to support customers in complying with ESG disclosure requirements and promote their ESG proposition in a clear and transparent way so investors can be better informed.

UN PRI signatories

- We are excited to have signed up to the UN PRI so we can bring added value to our clients and their end investors.
- As part of our portfolio management, we dive into the underlying data to help us understand where our clients' money is doing less harm and more good, while still delivering on our risk and return goals.
- Being part of the PRI is a way of demonstrating our ongoing commitment to responsible investment - it is also an internationally recognised way of showing our responsible investment principles to our prospects and clients.
- These principles form a basis for our own ESG investment framework - they help ensure that our principles are aligned to the underlying fund managers and can be reported on in a consistent way.



EMPLOYEE ENGAGEMENT

Employee Survey

Our culture is at the heart of our operations and something every employee contributes to. Our annual engagement survey invites all employees to share their views and insights as the basis for deeper exploration into our areas of strength and opportunities for growth.

Survey Participation

Over 80% of employees have participated in our annual survey each year since its inception in 2019, helping us to build a rich picture of what our employees value and where we can improve the employee experience even further.

Upward trends

We're delighted to see a continued upward trend in our 2021 results, particularly given the ongoing challenges presented by the pandemic such as being unable to meet colleagues and clients in person as frequently as we'd like. Over 81% of employees responded favourably to questions on a range of topics including our working environment, their managers, our communication, to equal opportunities and more. This increased from 79% the previous year.

2021 was the second year of measuring our employee Net Promoter Score and we were pleased that this went up 5 points to 30. We are also thrilled that our Employee Survey results continue to show significant gains year on year, and reflect the progress of our thriving organisation.

Our Commitment

We will continue to listen and respond to what's most important for our colleagues, through surveys, focus groups and considering internal and external factors that influence this. We're delighted our global FE fundinfo team is growing and recognise the importance of ensuring all employees feel part of our ongoing journey.

“ Over 89% of people agreed that the culture at FE fundinfo allowed them to be themselves at work.

“ 90% of people agreed that people in their team shared ideas and best practices of continuous improvement with one another.

“ 84% felt they understood where their role fitted into FE fundinfo's broader vision.

“ 83% agreed that people from different backgrounds and with a range of experiences had equitable opportunities to advance their careers at FE fundinfo.

WHAT YOUR EMPLOYEES SAY ABOUT US

“ FE fundinfo was an opportunity for me to work for an industry-leading and truly revolutionary company. Coming from the SaaS and startup world, I’ve previously worked in much smaller marketing teams and businesses with less depth and development in terms of their product and propositions.

At FE fundinfo I’m part of a more established, well-defined, and multi-disciplinary team, which provides lots of opportunity for growth and development. It is an exciting time as the business is focused on growth. I was delighted to come on board and join the team as we continue to shape and disrupt the fund industry.

Safiya | Marketing Executive



“ Fast-paced like a start-up, challenging and interesting

“ Great work / life balance in a flexible and supportive atmosphere.

“ Exciting to be working for a well-recognised brand in the industry

“ Working on the latest tech in a quickly evolving environment

“ Multicultural feel, open and inclusive

“ A place to grow along with the company

EMPLOYEE HEALTH, SAFETY & WELLBEING

At FE fundinfo we care deeply about our people and their development. We strive to create an environment where every member of staff can thrive and reach their full potential. From day one, employees are introduced to our people, talent development programmes, and a rewards package aimed at putting our employees' wellbeing first.

We believe that listening to our employees is key to creating a healthy work environment. As such, we run pulse surveys to solicit direct feedback on the challenges employees are facing. These surveys have been especially valuable during various stages of the pandemic allowing us to respond accordingly. For example, in our Chennai office we hosted a covid-19 vaccination drive for our colleagues because we know that health comes first.

Versatile Working

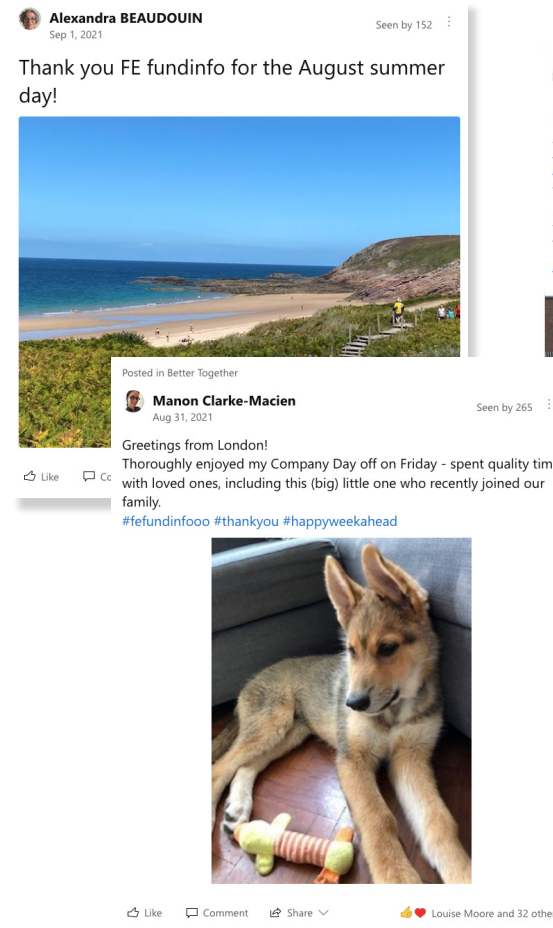
As we saw restrictions from the pandemic ease across many of our global locations, we recognised the value in introducing a new way of working through our Versatile Working Principles. These enable us to exercise greater flexibility in how we work and prompt consideration to the environment when planning business travel. We value in-person time with our colleagues, especially for collaborating and building rapport, yet understand the benefits working from home can bring in terms of managing a work/life balance. We've had fantastic feedback from employees to date but will continue to monitor and seek feedback on our ways of working and to adapt to the changing environment.

Employee Wellbeing

We actively support the physical and mental wellbeing of our employees and recognise the positive impact a great work environment can have on both. Over the past 18 months, we've run several initiatives to support our employees' health along with offering talks hosted by local charities and experts specialising in mental health. Wellbeing is a core theme within our Management Development Programme, which explores the influence of the manager's role in the wellbeing of their team.

Digital detox, two extra days annual leave

In 2021, all FE fundinfo employees were invited to enjoy additional leave to unwind and recharge as a result of their extraordinary commitment during the pandemic. Our teams were given the choice of two dates for each extra day, and encouraged to enjoy some digital detox.



Wellbeing at a local level

As a global organisation, we recognise the value in taking a local approach to wellbeing initiative. We know that what works well in one place might not work as well somewhere else.

Chennai initiative

In 2021, we partnered with YourDOST to offer a host of wellness services to our Chennai employees and their family members. The service enables individuals to easily and confidentially connect with accredited mental wellbeing experts to provide timely coaching and counselling that provides support when needed. Through this partnership we've hosted engaging webinars on common topics that resonate with our population, including: work/life balance, destigmatising mental health and celebrating our strengths.



Charity Miles

In late 2020 we introduced our Charity Miles initiative. The World Health Organisation says that “physical activity has significant benefits for hearts, bodies and minds” and recommends adults 18-64 years old complete a minimum of 150 minutes of moderate intensity aerobic physical activity each week.

As many employees were experiencing COVID-19 restrictions and lockdowns, we wanted to encourage them to step away from their home offices and get active. Each month a difference office selects a charity of their choice and at the end of that month the total mileage completed by our global employee base is turned into a monetary donation for that charity. Even some of the less active among us have got involved and we have seen some healthy competition across teams.

Sometimes the charities have very personal connections for employees, which has provided further incentive to get active and work together towards meaningful goals. Charities have included: mental wellbeing, ending hunger, women’s rights, life-saving care and much more.

Physical environments

We know that having a great physical set up whether working from home or in the office is key to wellbeing. That’s why we ensure all employees are equipped with the tech they need in either place and don’t have to worry about transporting heavy equipment around. We value the face-to-face time we spend with colleagues in the office and design our spaces to support effective collaboration.

Our Commitment

We’re hoping that in 2022 we’ll be able to take advantage of our Versatile Working Principles and spend more quality time together face-to-face than we have been able to in the prior two years. We know that many FE fundinfo employees enjoy being active, so we’re keen to introduce further innovative health and wellbeing initiatives over the next 12 months.

“Hafal (Welsh for ‘Equal’) is a Welsh charity dedicated to improving the lives of people with a mental illness or physical disability and their carers. They aim to improve people’s lives through holistic, recovery-focused individual care and treatment plans for everyone receiving secondary mental health services, reduce inequalities in health and social care, and provide support and friendship to clients. It’s been fantastic to support a charity that we know has such an impact in the community.”

Rhys | Marketing Assistant



“At the same time the Parisian office were invited to pick a charity, several women in France were subjected to hate crimes over a short period of time. We decided to pick a charity helping women who are facing violence. “Solidarité Femmes” helps women to make difficult personal decisions such as leaving a violent partner, and finding temporary accommodation. This charity helped a friend of mine, so having the opportunity to support it through the great initiative offered by FE fundinfo, was a kind of a personal “thank you” for saving my friend, and other women in France who need help because of a violent partner.”

Jennifer | Customer Success Team Manager



“Our Chennai office is designed and built to support a versatile work culture and a sustainable work environment. With self-service desk bookings to high-tech meeting rooms & collaborative spaces, the office provides great flexibility for staff to blend virtual and in-office team interactions to collaborate seamlessly. To develop a culture of sustainability, the office setup encourages staff to minimise energy and material waste and use recycled or eco-friendly materials where possible.”

Sundar | Director India Office Management



DIVERSITY, EQUALITY & INCLUSION

Why it is important to us

We are determined to create a truly inclusive and supportive organisation which recognises and promotes the benefits that a diverse workforce brings. In an industry that has taken great strides in recent years to improve its diversity practices, we want to be at the forefront of driving further change to ensure everyone has a voice and can contribute to making both FE fundinfo and the wider industry more diverse, more resilient and able to make better decisions.

We know that diversity is about more than our visible differences and is about bringing together our different backgrounds, experiences and ways of thinking. This goes beyond policies and headcount, it's about individuals within the organisation feeling a sense of belonging in a culture where they feel supported to succeed and their differences are celebrated.

Kate Scarles leading our people initiatives

Our Chief People Officer Kate Scarles has been named by The Financial Technology Report as one of the top 25 women Leaders in Financial Technology of Europe for 2021. Kate's team works to ensure our company's culture and values allow everyone in the company to succeed and fulfil their potential. We're thrilled to have Kate leading our people programmes across our global offices.



Our data

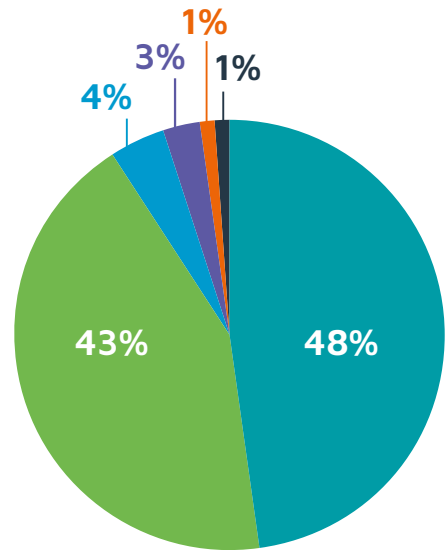
In order to make positive change, we need to understand the make-up of our workforce. In 2020 we introduced a new software to capture, centralise and bring greater transparency to our people data. Diversity data capture is still relatively new for us and as such our data set is not as rich as we would like. We are continuously enriching this data set to better understand our population in terms of gender, nationality and ethnicity, allowing us to build our inclusive culture.

	♀ Female	♂ Male
Executive Team	18%	82%
Managers	43%	57%
Overall	43%	57%

Data as at 31 December 2021

Our ethnicity and nationality data

In 2021 we launched an initiative asking employees to share their ethnicity data where they felt comfortable in doing so. So far nearly half of all employees have shared this information and the breakdown of this data can be seen in the table to the right. We're keen to build on this in 2022.



● White ● Asian ● Undisclosed ● Other
● Black, African, Caribbean ● Multiple Ethnic Groups

Data as at 31 December 2021



We are proud to count over 25 nationalities represented across our global workforce.

Our Actions

Black Lives Matter

George Floyd's killing in 2020 ignited conversations across FE fundinfo about racism and how to tackle it. Our first employee resource group, Black Lives Matter, was formed as a result of these discussions, providing dedicated space to explore the topic with colleagues, share experiences and deepen understanding to take positive steps on the journey to eliminating racial inequality.

Since then, we have welcomed renowned speakers Elijah Lawal a communications and public affairs manager at Google, and Nels Abbey a British-Nigerian writer, media executive and satirist who have encouraged us all to think differently and promoted new ideas for working.

Urban Synergy

The Black Lives Matter group also identified award-winning charity Urban Synergy for the fantastic work they do to support young people reach their full potential.

FE fundinfo are proud corporate sponsors of Urban Synergy and active participants in the initiatives they run. Employees get involved by being panel members at seminars and through mentoring young people through their next career steps.

“ **Being an Urban Synergy mentor isn't about having all the answers, it is about providing a safe place for your mentee to ask questions and be guided by your life experiences. It is such a rewarding programme where you facilitate young people's learning outside of a school environment and watch their confidence grow through several activities that will help prepare them for university and work place applications.**



Jordan | Business Analyst

Gender Equality

In 2021, employees from across the globe came together to form our Gender Equality group to have conversations, share ideas and spark initiatives that continue to challenge gender inequality.

- The group were delighted when Mahvish Ahmad, business lecturer turned blogger and influencer joined us to talk about gender inequality and her experiences have varied across cultures and tips to take into the workplace and home.
- We ran a week-long campaign for International Women's Day to inspire deeper conversations across the organisation through articles, quizzes, fun facts and daily challenges.

Diversity and Inclusion in our Management Development Programme

We're proud of our custom-built Management Development Programme which focuses on 12 distinct modules to support the development of our future leaders. Our Diversity and Inclusion module explores the instrumental role managers have in establishing diverse, inclusive and collaborative teams and the strength we build in valuing our differences.

Our Commitment

In 2022 we are looking to:

- Expand our data capture to incorporate the businesses we acquired in 2021, and continue to encourage data gap completion in accordance with local legislation.
- Complete Gender pay gap reporting for the UK.
- Build on our relationship with Urban Synergy by encouraging more employees to become mentors.
- Support interns through the #10000blackinterns programme to help transform the horizons and prospects of young Black people in the UK, by offering paid work experience as well as world-class training and development.



TRAINING AND CAREER DEVELOPMENT

The continuous development of our greatest asset, our people, is a key component of our ongoing success as industry leaders. We believe that all employees should have equal opportunity to learn and grow with us. At the same time we recognise that learning paths that help the individual to reach their full potential can take many forms and directions and must accommodate different needs, skill sets and interests, which is reflected in our programmes and policies.

We operate a performance management philosophy and system that supports a fair and transparent experience for our employees. We know the most valuable aspect of performance management is in the rich discussions that take place to create aligned understanding, both through everyday feedback, and formal checkpoints throughout the year. We believe in celebrating our achievements and regularly recalibrating to ensure we're focused on goals that drive both FE fundinfo's agenda, and individual development forward.

Sponsored training

We're delighted to support the professional growth of employees through sponsoring formal courses and allocating time to study for them. The training undertaken varies depending on the role but some typical industry recognised qualifications include, the Investment Management Certificate, the Chartered Financial Analyst® Program, qualifications in regulated financial planning, as well as those in technology and operational areas of the business.

Recognition

Our newly introduced recognition system enables all employees to appreciate the efforts of colleagues across teams and locations, supporting our collaborative way of working. Our recognition badges are based on our core values and it was great to see 457 awarded in 2021.

LinkedIn Learning – access for all

In a fast-paced world, change is constant and the ongoing development of skills and knowledge is essential for our ongoing success. LinkedIn Learning gives all employees unlimited access to over 16,000 courses covering a huge range of topics from technical, business and creative skills, to personal development.

Each month new topical learning challenges are set through curated bite-sized content, making it easy to create a daily learning habit. We celebrate and call out our top learners and believe that knowledge is most valuable when it's shared.

Over 99% employees have activated their LinkedIn Learning accounts

- **Up to the end of 2021:**
 - Over 12,000 courses viewed
 - Over 65,000 videos viewed
- **Some of the most popular topics include:**
 - Wellness
 - Career Management
 - Positive Work Environment
 - Interpersonal Communication
 - Productivity Improvement

COMMUNITY IMPACT

Community Day

People across the world have faced a whole range of challenges as a result of the pandemic, yet we have also witnessed incredible acts of kindness in response. The pandemic offered a stark reminder about the importance and power of people working together in the face of adversity.

As such, in early 2021 we introduced Community Day: a day to give back where each of our employees has the opportunity to dedicate a day of our work time to a meaningful cause. Despite on / off restrictions from the pandemic, FE fundinfo employees were able to dedicate over 500 hours redecorating schools, cleaning up our urban environments and large-scale gardening to look after our green spaces. It also provided a great opportunity for some team building outside of the usual work setting.



Local initiatives

As an organisation we think global and act local and this shines through in our other charity initiatives to respond to the local causes that resonate with our employees. Examples include the Luxembourg office donating money raised from old office equipment to Association 4Ocean who are committed to ending the ocean plastic crisis, colleagues in Chennai gave clothes to a charity supporting women's causes and employees in Hong Kong donated food to be distributed to those in greater need.



Our Commitment

Throughout 2021 we built some great relationships with local charities and in 2022 we are looking forward to expanding these networks and identifying even more opportunities to support our communities.



Management Development Programme

Our tailored-made Management Development Programme provides a consistent framework for all FE fundinfo managers to operate within. The programme runs over two years and is split into two phases. The first phase connects managers from across office locations, offering participants the time and space to explore key topics, reflect, and make plans for the next steps in their management journey. The second phase capitalises on the sharing of knowledge and experiences through peer-to-peer coaching sessions, as part of a continuous cycle of developing FE fundinfo managers.

Apprenticeships

In 2021 we've been delighted to welcome ten new employees through our apprenticeship programme, nine from the UK and one from Switzerland. Those enrolled onto the programme become fully immersed within the role while studying for a substantial qualification in their field. This demanding yet rewarding schedule provides a fantastic opportunity for driven individuals.

Graduate scheme

We operate a graduate scheme where each successful applicant gains experience from working in four different teams over two years. This also provides the opportunity for existing employees to develop their mentoring skills and learn from their mentees.



I started as a Social Media Executive on the marketing team. The position was ideal for a newcomer because you can learn a lot from the content that features on our social media.

Now that I'm more knowledgeable of the business, I was able to secure my desired seat in the Institutional Sales team where I can continue to learn and become a business representative. What I've enjoyed most about FE fundinfo is the people, everybody is down to earth and fun to be around.

Harry | Graduate Scheme



Our Commitment

In 2022 we are looking to explore more effective ways to track the skills and professional development of our employees across the business. In an organisation that is evolving quickly we're keen to present opportunities and facilitate internal moves to ensure we've got the right people and talent in the right places. We will continue to roll out our MDP programme to new managers and build 'manager muscle' across the organisation.

RECRUITMENT

Our recruitment starts with nurturing our existing talent and working together to build an engaging, diverse and inclusive culture where employees can thrive. We know that our success is only possible because of our fantastic people and that by listening and responding to their needs and interests, we retain and attract new talent through their rich networks.

We are an equal opportunities employer and design our recruitment and performance management processes around clarity, transparency and fairness. However, we know that our industry falls short of representing the diversity of the society in which it operates, and we are determined to identify further opportunities to continue to drive positive change.

Glassdoor

We are actively engaged with Glassdoor and seek honest feedback from present and past employees by utilising the review feature on the platform. Where possible, we respond to every piece of feedback, either positive or suggesting improvement and ensure the relevant HR team is looped in to facilitate change where applicable.



ENVIRONMENTAL IMPACT & ENERGY MANAGEMENT

Our Environmental Journey

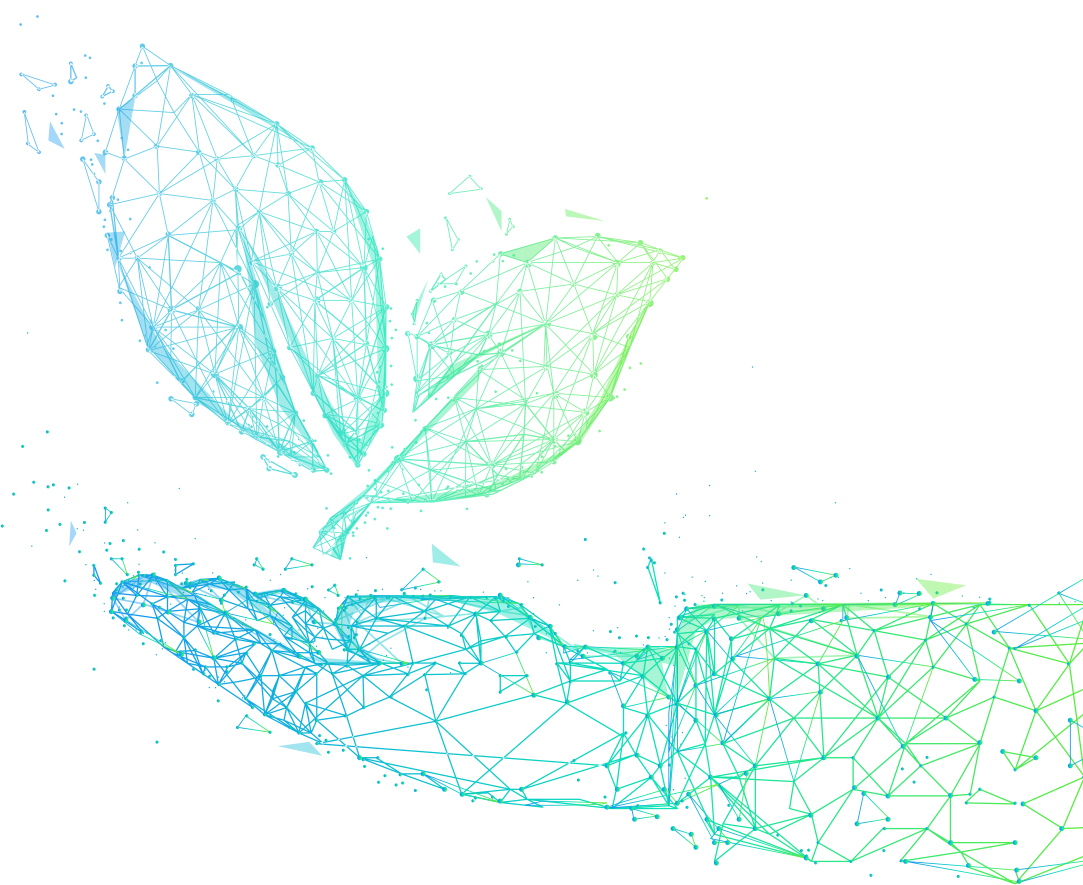
We recognise our responsibility to the environment beyond regulatory requirements and our approach reflects the interests of our stakeholders in our ongoing journey.

Our Environmental Policy underpins the practical application of our environmentally friendly practices. This helps employees to easily understand how they can embed changes in the workplace that reduce our environmental impact, from recycling schemes to giving due consideration to the imperative of our business trips. We review and update this policy annually and make changes where necessary.

For the past two years we have completed Streamlined Energy and Carbon Reporting and in 2021 we expanded our energy data collection through capturing our carbon footprint across Scopes 1-3 of the Greenhouse Gas Protocol. With travel in 2020 restricted due to the pandemic we chose to begin our data collection from 2019 as a more typical illustration of our annual energy consumption. This information has provided a strong foundation to further develop our goals to reduce our overall environmental impact and provided the platform for our next steps; to seek validation of our carbon footprint by an external party, and explore setting emission reduction targets grounded in climate science through the Science Based Targets initiative (SBTi).

We seized the opportunity to raise awareness across the organisation about our environmental impact by turning Energy Efficiency Day on the 6th of October into a week-long campaign. Throughout the week colleagues from across our locations shared stories, tips, and insights on how we can reduce carbon emissions.

High engagement during energy efficiency week ignited employee enthusiasm and led to the launch of the FE fundinfo Environment Group and continue the discussion beyond the week's events. This group invites all employees who would like to contribute, to meet, discuss and drive our environmental agenda forward. This has been highly popular and brought further understanding about the context of the environment into the workplace and how we can all play our part in bringing about positive change. The group are also working on a scorecard to track the positive changes across each location and use friendly competition to evolve our and improve operations in this area.





Cloud Migration

We're trusted for our technology solutions and believe that in addition to providing exceptional service, we have a responsibility to create solutions that reduce environmental impact. Over the last two years we have carried out extensive work to optimise our data centres and services.

By the end of December 2021, we had decommissioned our on and off-site data centres in place of Cloud services to maximise energy efficiencies. Our Microsoft Azure data capture demonstrates over a 95% carbon emissions efficiency saving when compared with equivalent on-premises servers.

Responsible travel

The global pandemic presented us with the unique opportunity to evaluate new ways of working and retain some of the best methods that helped us in our efforts to reduce our carbon footprint.

Committed to keeping travel to below pre-lockdown levels, we introduced our Responsible Travel guidelines to aid travel decisions and optimise the face-to-face time spent with our customers and colleagues while being more mindful of the frequency and purpose of business trips.

Green energy & office spaces

Despite many of our global offices being in shared buildings, we're pleased that 43% of the electricity we use is from renewable sources. We realise that while we may not be the sole decision makers for our energy tariffs in all our locations (due to shared office spaces) we continue to request green energy and influence change.

Our Commitment

We will continue to review and identify areas where we can make carbon emission savings across the organisation, from individual behaviours to company-wide policies.

In 2022 we're looking to expand the scope of the data fields we capture to measure our carbon emissions. This is likely to include information on employee commuting and working from home.

We recognise that capturing our data is a first and important step and that further value will be gained by forming a partnership with an organisation to validate our figures and set targets for reducing our emissions.

PRIVACY & INFORMATION SECURITY

Our trusted data is at the heart of our business, and we recognise our responsibility to uphold the highest standards of cyber security and data handling in our operations, products, and services, both for our customers and ourselves.

We know that the privacy and protection of client and employee data is critical to the sustainability of our business, and it is a priority at FE fundinfo board level.

Our expert, Information Security Team work with all business functions to embed our sustainable security management framework. We believe in sustaining a resilient business through risk mitigation covering human rights, environment, business conduct, data protection and cybersecurity. Examples of this include:

- Methodical reviews of our policies and procedures to anticipate and respond to the needs of the changing market
- Security controls implemented based on risk assessments, including supplier risk assessments
- Regular training and assessments for all staff
- Establishing comprehensive business continuity plans across the business
- Other compliance activities, including internal audits, internal security testing, phishing testing
- Identifying and utilising sustainable providers, including Microsoft and Cloudflare

In addition to the above, FE fundinfo holds ISO 27001 (information security management) and ISO 9001 (quality management) accreditations on relevant scopes across the business.

Our Commitment

In a rapidly changing environment, we seek to continuously improve our response and recovery processes, learn from real events and simulations, and implement best practices and policies. We are committed to providing reliable and secure services that protect the information of our customers and employees.

If you have any questions about the report
or would like further information:
please contact **CSR@fefundinfo.com**.

