



Sustainability Report

2023

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Message from Liam Healy

At FE fundinfo, we are committed to sustainable development and creating long-term value for our stakeholders. We believe that as a leading provider of data, technology and research solutions to the investment industry, we have a responsibility to act with integrity, transparency and accountability in all aspects of our business.

This year, we are pleased to publish our third Sustainability Report, which covers our performance and initiatives in the areas of environmental, social and governance (ESG) during 2023. For the first time, we are reporting with reference to the Global Reporting Initiative (GRI) standards, the most widely used framework for sustainability reporting. This enhances the comparability and credibility of our report and demonstrates our alignment with global best practices.

In 2023, we also introduced an ESG Committee, comprising senior representatives from different functions and regions across our business. The committee is responsible for developing and implementing our ESG strategy, policies and targets, as well as overseeing our reporting and disclosure. The committee meets quarterly and reports to the Board of Directors on a regular basis.

We recognise that sustainability is an ongoing journey and that we have room for improvement and innovation. We are excited to share our progress and achievements in this report, as well as our goals and plans for the year ahead. We welcome your feedback and suggestions on how we can further enhance our sustainability performance and reporting.

Thank you for your continued support and interest in FE fundinfo.



Liam Healy
Chief Executive Officer,
FE fundinfo

ESG Governance

ESG Committee

As part of our commitment to ESG governance and strategy, we introduced an ESG Committee in 2023 to help bring greater alignment to ESG issues across the business. With many parts of the business already working together on various sustainability issues, we wanted to establish a channel that regularly brought these people together to share information, capture actions, track progress and ultimately bring greater transparency to our approach.

The ESG Committee consists of senior leaders from different functions and is chaired by our CEO, Liam Healy. The committee meets quarterly to review our performance on ESG matters, set goals and priorities, and oversee the implementation of our ESG policies and initiatives. The committee also reports to the Executive Board on a regular basis, ensuring that ESG issues are integrated into our strategic decision making and risk management.

The committee supports various ESG workstreams, often working cross-functionally to ensure the planning and implementation of our goals down through the business.

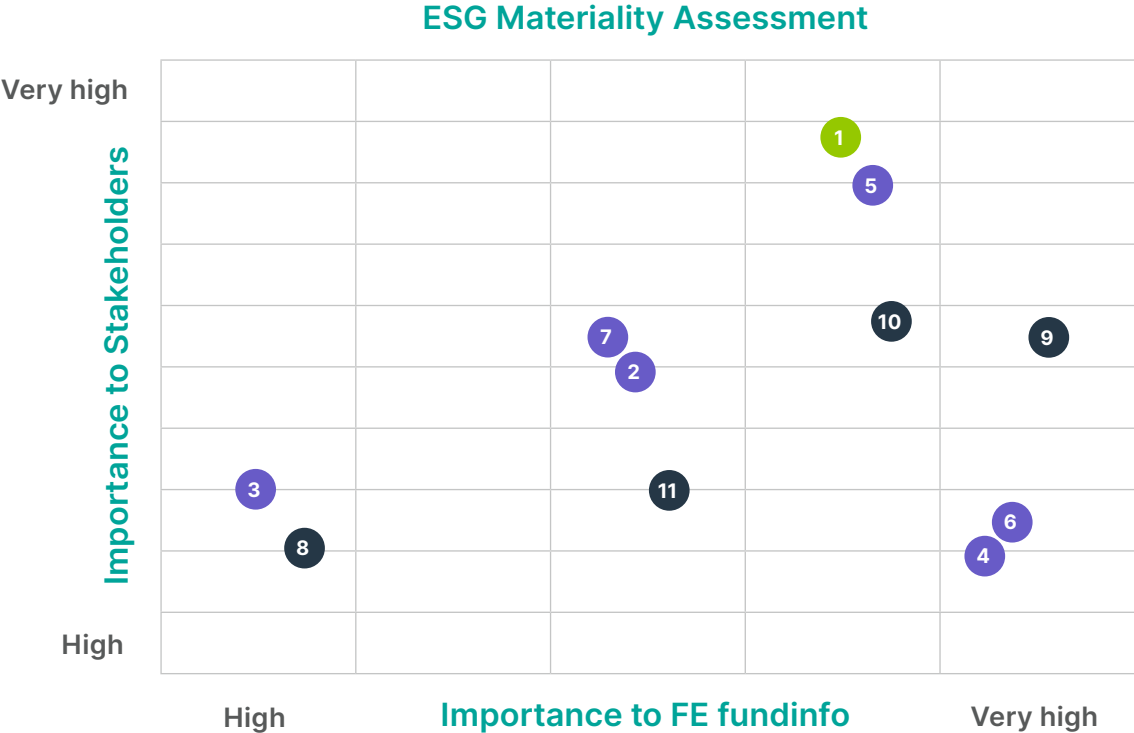


Materiality Assessment

Completing our comprehensive materiality assessment, we aimed to understand the expectations, concerns and perspectives of our stakeholders, as well as the opportunities and risks for our business in the context of ESG. We believe that it is important for us to regularly refresh and update our materiality assessment, as the ESG landscape evolves and new topics emerge. This process involved gathering and analysing input from key stakeholders as shown in the table below.

Stakeholder group / area	Method of engagement
Senior FE fundinfo stakeholders	Survey and an in-depth conversation with high-level stakeholders who make up FE fundinfo's ESG Committee
Employees	Survey to understand issues of most material importance to our employees
Investor view	Review of due diligence questionnaire documents from investors (via our current investors, Hg Capital)
Regulations	Review of current and upcoming ESG legislations, standards and frameworks that are specific to software companies
Peers	Deep-dive desktop review on key ESG topics of the performance of eight of our peers
Suppliers	Review of ESG focuses of our top suppliers
Media	Review of software & services reading lists and web-scan of FE fundinfo and our peers against ESG topics

The following chart illustrates the ESG issues that we identified as most material for FE fundinfo, based on their importance to our external stakeholders and to our own business objectives. Out of 26 topics that we identified as potentially relevant for FE fundinfo as a leading financial data company, these are most material to us currently. The materiality assessment reflects a consolidated view of our business strategy across all our operating regions. We are aware that the level of importance of each ESG topic may vary depending on the local context and needs of our different markets. We acknowledge that there are additional ESG issues not shown in the below chart, that also form part of our ongoing commitment to being a sustainable and responsible business.



Environmental

- 1 Climate change mitigation and energy management

Social

- 2 Attracting and engaging talent
- 3 Community engagement
- 4 Customer satisfaction
- 5 Diversity and belonging
- 6 Employee health and wellbeing
- 7 Human rights

Governance

- 8 Artificial intelligence
- 9 Cybersecurity and data privacy
- 10 Governance, business culture and ethics
- 11 Transparency

This report reviews the topics that have been prioritised from our materiality assessment and how they relate to our accomplishments and future aspirations, taking into account ways to reduce any negative impacts and increase positive ones, when applicable.

Transparency in reporting

We value honest and clear communication with our internal and external stakeholders on our sustainability journey. As expected, Transparency remained a significant topic within our materiality assessment for the third consecutive year.

This year we have aimed to enhance our sustainability reporting by adopting the Global Reporting Initiative (GRI) framework, which is widely recognised as the leading international standard for sustainability reporting. The GRI framework helps us identify and communicate the most relevant and material ESG issues for our business and stakeholders, and to report on our performance in a consistent and comparable way. We have reported with reference to the principles of the GRI standards this year (rather than in accordance with).

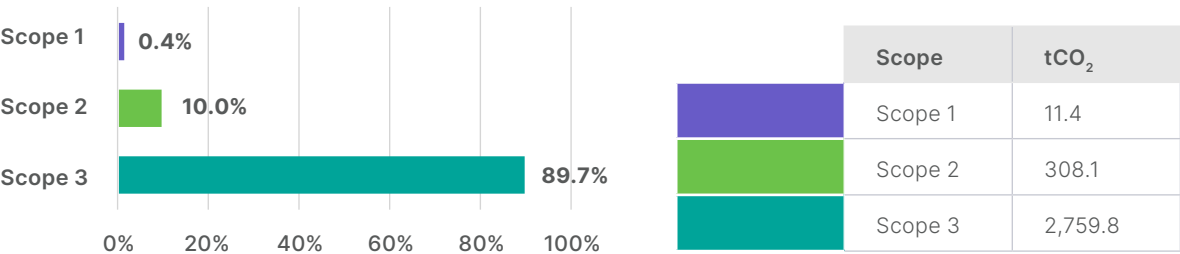
Climate change mitigation and energy management

We know that climate change is a pressing and complex challenge for our planet and society – this view is reflected in our materiality assessment and identified as a very important ESG issue by internal and external stakeholders. We understand our responsibility to take appropriate action to reduce our environmental impact.

Our carbon data journey

We began measuring our carbon footprint in 2021 using the Greenhouse Gas Protocol, as a widely accepted and standardised global framework in carbon accounting. In subsequent years, we have focused on improving the quantity and quality of our data, knowing that the completeness and accuracy of this information is key to understanding where we can focus our efforts to reduce our environmental impact.

For our 2023 data collection we partnered with [Diligent](#) who were able to provide external expertise and guidance as well as a platform solution that enabled us to report on more data than previous years. As part of our commitment to transparency, our GHG scope totals are shown below (location-based):



Our Scope 3 emissions include data from the following categories:

- Purchased goods and services
- Fuel- and energy-related activities
- Waste generated in operations
- Business travel
- Employee commuting

Cloud service efficiencies

As a data and technology company, we realise that our use of data centres forms a significant portion of our carbon footprint. We seek to increase efficiency as part of our strategy in using cloud-based solutions.

We ensure that when we integrate new businesses into our portfolio, we migrate their data and systems to our cloud platforms, which are more energy efficient and scalable than traditional data centres. This also allows us to leverage the benefits of cloud computing for our customers and stakeholders.

Responsible travel

We appreciate seeing clients and colleagues in person but also acknowledge the effect this has on our carbon emissions, so we try to do so when the extra travel is worth it. We keep using video calls as a more sustainable option on many occasions.

Our commitment

We're pleased to have calculated a fuller picture of our carbon footprint this year, including our purchased goods and services which we know is a significant portion of our emissions. We are committed to continuing to improve the quality of our data in preparation for beginning work on setting carbon reduction targets and look forward to reporting on our progress here for next year.

Diversity & Belonging

Diversity and Belonging ranked highly on our materiality assessment for internal and external stakeholders. We believe that diversity and belonging are essential for our business because they:

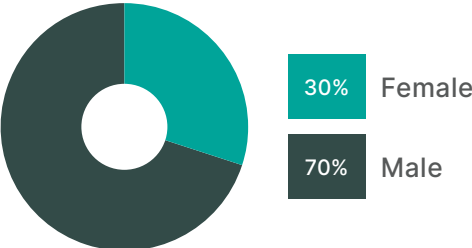
- Enhance our creativity and innovation by bringing diverse perspectives and ideas to the table
- Improve our decision making and problem solving by reducing groupthink and bias
- Increase our customer satisfaction and loyalty by understanding and meeting the needs of diverse markets and communities
- Boost our employee engagement and retention by fostering a culture of respect, inclusion and belonging
- Strengthen our reputation and brand image by demonstrating our commitment to social responsibility and human rights

In 2023 we introduced a new Diversity, Equity and Inclusion policy to ensure information about our approach was easily accessible in one place. This policy forms part of our annual mandatory training for all staff.

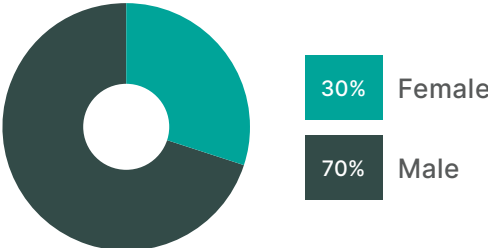
Gender data

We measure and monitor gender balance and recognise the benefits of gender diversity across all levels of our organisation in driving performance and innovation. Towards the end of 2023, we began to redefine and bring clarity to roles and reporting lines within the business. This work continues into 2024, but this report and the data below reflects data for calendar year 2023 when this work was still ongoing.

Executive leadership team

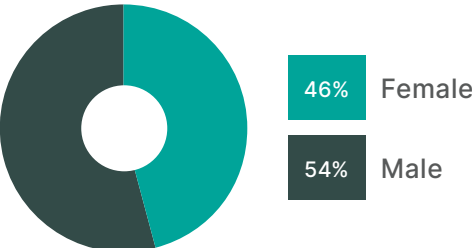


Senior management team

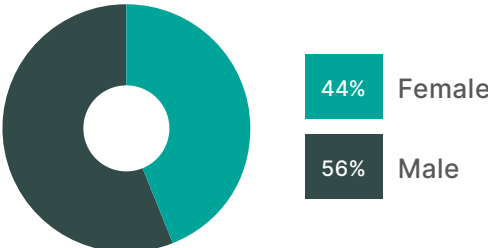


Manager

(Not exec, doesn't report to exec)



All other employees



- At the end of 2023, our 'Executive leadership team' (ELT) included 10 people, 3 women and 7 men, increasing female representation in this category by **5%**
- Our 'Senior management team' (SMT) included all managers reporting directly to the ELT – included **30%** of females compared to **45%** the previous year. At the time of reporting we were part way through leadership changes and are committed to a goal of at least **40%** females in our newly defined Senior Leadership Team, which we will revisit in future reports
- Our 'Manager' population includes all team managers who are not part of the ELT or the SMT and overall, the percentage of females has increased by **9%** compared to last year
- 'All other employees' represents our colleagues that do not fall within the above categories, and this has remained relatively stable, with **44%** females, a **1%** increase on last year

UK Gender Pay Gap report

Pay gap reporting is an important tool to measure and address the differences in pay between men and women. It helps us identify and tackle any potential barriers or biases that may affect our ability to attract, retain and develop diverse talent. At FE fundinfo, we are committed to fostering a culture of inclusion and belonging, where everyone can thrive and contribute to our success. That is why we have voluntarily completed the UK gender pay gap reporting for the second year (see our [2023 UK Gender Pay Gap report](#)), even though we did not meet the 250 headcount threshold in the UK.

Ethnicity data

In previous sustainability reports we have shared the ethnicity breakdown for all FE fundinfo colleagues, excluding EU locations due to local legislation, and have reported the same breakdown in this report for consistency. However, in 2023, with our new Diversity & Belonging employee resource group (ERG), we identified the need to rethink our approach and carefully examine the suitability of ethnicity categories across each of our locations.

We want to ensure that our ethnicity data reflects the diversity of our people and the communities we serve as much as possible, and that we use it to guide our inclusion strategies and initiatives. Therefore, we have started a project to review and update our ethnicity categories and data collection methods around the world. We look forward to providing an update in our 2024 Sustainability Report.

Ethnicity	Percentage
Information not provided	52.4%
Asian	21.3%
White	20.8%
Undisclosed	1.9%
Other	1.7%
Black, African, Caribbean	1.1%
Multiple Ethnic Groups	0.5%
Hispanic or Latino	0.1%
Native Hawaiian or Other Pacific Islander	0.1%

Note: **Undisclosed** is where employees have selected this option, choosing not to disclose their ethnicity. **Information not provided** is where employees have not selected an option.

Our Diversity & Belonging employee resource group

Diversity is not only about differences such as gender, ethnicity, age or disability, but also about our diverse backgrounds, experiences, perspectives, skills and knowledge. This is why we believe it is vital to have the voices of employees from across locations, functions and levels of seniority driving our Diversity & Belonging agenda, while being championed from the top.

Early in 2023 our newly formed diversity & belonging Employee Resource Group (ERG), which comprises colleagues across departments and geographies, joined a series of internal workshops to re-establish what Diversity & Belonging means at FE fundinfo and to feed directly into our strategy.

To inspire and guide our inclusion journey, the group established our Vision Statement, “We’re powered by our differences”. Since then, the group has met monthly as we continue to work towards a culture where everyone feels a sense of belonging.

Understanding the views of colleagues

In 2023 we introduced a third-party employee engagement survey platform (see ‘Attracting & Engaging Talent’ section for more information) that allows us to measure and identify actions to improve our diversity and inclusion efforts across the organisation. This platform enables us to collect anonymous feedback from our employees on various aspects of their work experience, such as respect, fairness, belonging, voice and growth. We also use the platform to track our employee net promoter score (eNPS) for diversity and inclusion, which reflects how satisfied they are with FE fundinfo’s efforts. We were pleased that our survey results for 2023 resulted in an overall eNPS for diversity and inclusion of 42 (on a scale of -100 to 100). However, we are not complacent and we continue to strive to understand relevant issues impacting different locations, departments and individuals to further increase our score and foster a culture of belonging for everyone.

Pride

As part of our ongoing commitment to diversity and inclusion, we invited Oscar Hoyle, an experienced inclusion consultant and LGBTQ+ advocate, to deliver an online webinar for colleagues in June 2023. The webinar, titled ‘LGBTQ+ 101’, provided an overview of the concepts and terminology related to sexual and romantic orientation and gender identity, as well as the history and significance of the LGBTQ+ community and its labels. Oscar also shared their personal and professional insights into the challenges and opportunities faced by LGBTQ+ people in the workplace and society at large, and how allies can support them in creating a more inclusive environment.

International Women's Day

To celebrate International Women's Day in 2023, colleagues across FE fundinfo were invited to join local events and activities where they could meet and discuss gender equality issues and solutions in and outside of the workplace.



Our commitment

- We believe that transparency and accountability are essential to building trust and driving positive change, which is why in 2024 we will be exploring the extension of the gender pay gap reporting exercise across other locations. We will consider different legislative requirements, for example, Australia's Workplace Gender Equality Act and the EU Directive 2023/970 as part of our 'think global, act local' philosophy.
- In our 2024 report we look forward to sharing the results of our ethnicity data review for different locations and the actions implemented as a result.
- We also look forward to reporting on our progress towards our goal of our Senior Leadership Team comprising at least **40%** women.
- We will continue to identify opportunities to broaden our understanding and learn more about our differences, such as through the International Women's Day and Pride initiatives in 2023.

Human Rights

At FE fundinfo, we are committed to respecting and promoting human rights and labour conditions across our operations and supply chain. We believe that all people deserve to be treated with dignity and fairness, and that our business should contribute positively to the social and economic development of the communities we serve.

Our Human Rights policy reflects the principles contained in the International Bill of Human Rights, International Labour Organisation Declaration on Fundamental Principles and Rights at Work, the United Nations Global Compact and the UN Guiding Principles on Business and Human Rights. We respect our employees' right to join or form a works council or/and labour union without fear of reprisal, intimidation or harassment. We expect our employees, suppliers, contractors and partners to uphold these standards and to report any violations or concerns.

We are aware of the risks of modern slavery and human trafficking in the global economy and we take our responsibility to prevent them seriously. The activities of our business require a relatively short supply chain and comprises predominantly of professional services. Our company values, contracts and handbooks emphasise the need to act with integrity, in accordance with laws and in a manner which strengthens the trust of our stakeholders and enhances our reputation. The Company has given careful consideration to Section 54 "Transparency in Supply Chains" of the MSA and other similar legislation and our Modern Slavery Statement is available on our company website.

In 2023, we introduced a whistleblowing system that allows staff and other stakeholders to report any concerns anonymously and securely. This system is managed by an independent third-party provider and is accessible via phone or online. We implemented this system to enhance our culture of transparency and accountability, and to ensure that any issues related to human rights, labour conditions, ethics, or compliance are promptly identified and addressed. We believe that this system reflects our commitment to respecting and promoting human rights and labour conditions across our operations and supply chain.

All staff are required to review and attest to understanding our policies on Human Rights, Modern Slavery and Whistleblowing when joining the company and annually thereafter.

Attracting & Engaging Talent

Our culture and success depend on our people, so we are not surprised that 'Attracting & Engaging Talent' is one of the top five most significant issues for our stakeholders. Engagement is essential for our company culture and creating a positive employee experience, therefore in 2023 we enhanced our current initiatives and added new ones.

Recruitment

To support our global recruitment processes, we introduced a new Talent Acquisition team in 2023, consisting of experienced and dedicated professionals who work closely with our hiring managers and candidates. This team is responsible for sourcing, screening, interviewing and selecting the best talent for our organisation, as well as ensuring a positive and consistent candidate experience throughout the recruitment journey. The team also leverages our employer brand, diversity and inclusion initiatives, and our internal referral programme to attract and engage potential employees from various backgrounds. By having a specialised team focused on talent acquisition, we aim to improve the quality, efficiency and effectiveness of our recruitment activities and outcomes.

Employee Engagement

We seek to better understand employee voice by surveying our staff on various topics related to engagement, wellbeing and satisfaction. Last year, we committed to introducing a new software to collect more granular and localised insights on a wider range of issues. In 2023, we were pleased to launch Peakon as our survey platform, enabling us to measure and identify actions to improve employee engagement in a timely manner, using data-driven insights and actionable feedback across a wider range of topics. We believe that this tool will help us enhance the culture of listening, learning and improvement across our organisation.

We achieved a survey participation rate of **90%** for our first company-wide survey via [Peakon](#) in October 2023 and were pleased that our overall employee engagement Net Promoter Score (eNPS) went up to 18 from 13 the previous year, but acknowledge that this is short of where we would like to be. While taking a more localised approach to issues impacting engagement, we continue to identify company-wide priorities from the survey and communicate our approach to improving these areas via our monthly global townhalls and interim emails and video messages.

Learning and Development

In our dynamic global work context, change and opportunity are the norm. We are committed to creating and maintaining a learning environment where all employees can continually grow and adjust to face changes in the business and the industry with confidence.

We understand that learning happens in different ways and that there is no single solution for everyone, we therefore encourage team members and managers to use the annual performance to set development goals for the year ahead. These performance review forms are mandatory for all employees and followed through to completion.

FE fundinfo's Training & Development policy highlights our dedication to providing employees across all roles, levels of seniority and office locations with suitable training and development opportunities that can help them grow and develop as individuals and contribute to the company's objectives. We offer online learning, custom management courses as well as formal qualifications for various fields (for example in accounting and financial planning), because we understand that different learners have different requirements.

LinkedIn Learning

All FE fundinfo employees have access to various courses to support continued professional development on a regular basis via LinkedIn Learning. These courses cover different levels and topics, from general personal and professional development, to specific technical skills. In 2023, we saw a **30%** increase in the average number of LinkedIn Learning videos watched per person, with nearly 90,000 videos accessed by users. We regularly suggest relevant LinkedIn Learning content to colleagues that are topical and concise. We celebrate learning and we recognised over 100 top learners in our monthly townhalls in 2023.

Supporting our managers

One of the most significant factors shaping an employee's work experience is the team culture created by their manager. Our custom designed Management Development Programme gives new and experienced managers the support and clarity they need to be effective managers at FE fundinfo. Since the programme's inception in 2020, over 126 employees have participated in the programme.

Our commitment

- We're committed to fully utilising our enhanced employee survey results across teams and locations and to using this as a basis for our continuous cycle of improvement and to boost engagement for all employees. We expect to see the impact of this in our overall eNPS score and will provide an update on progress in future sustainability reports
- In 2024 we will be delighted to invite 48 more current and future managers to take part in our 12 month Management Development programme, which will represent a participation rate of **47%** across our manager population
- In response to identifying career growth as a company-wide focus area from our employee survey, we plan to introduce a Talent Planning tool to support managers in setting growth goals for their team members

Employee Health and Wellbeing

At FE fundinfo, we recognise that employee health and wellbeing is essential for our productivity, creativity and engagement. We are committed to creating a supportive and inclusive work environment where our employees can thrive and achieve their full potential. As part of our health and wellbeing strategy, we offer various benefits and initiatives to promote physical, mental and emotional wellness, such as flexible working arrangements, opportunities to join social and charitable activities, as well as local benefits.

Monthly wellbeing challenge

One of the ways we support our employee health and wellbeing is by organising monthly wellbeing challenges. Each month, a different office will nominate a wellbeing challenge and invite other offices to participate. The challenges are designed to encourage healthy habits and behaviours that can improve our physical, mental and emotional wellness. Some examples of our wellbeing challenges include: achieving a daily target of 10,000 steps, eating 5 portions of fruits and vegetables a day, or taking a few minutes every day to do something that supports our wellbeing – such as meditating, reading, or listening to music. We celebrate our achievements and share our experiences through our internal communication channels.

Global Sports Day

Our Global Sports Day initiative is dedicated to promoting physical activity, teamwork and fun among employees. Events varied depending on location and included games such as rounders, yoga, chess, the throwing game mölky and more. It is always a great opportunity to connect with colleagues outside of our usual work setting, with lots of laughs and some healthy competition – we look forward to running similar events in 2024.



Refresh Fridays

For the second year in a row, we introduced 'Refresh Fridays' during the European Summer period when we encouraged everyone to keep the days free from meetings, finish work early on a Friday and aim and do something that served their personal wellness. Whether it was spending time with family and friends, enjoying nature, pursuing hobbies or simply relaxing.

Our commitment

Following the introduction of our third-party employee engagement survey platform in 2023, we were able to gain greater insights into how employees feel about their health and wellbeing. The overall score for the Health and Wellbeing topic was 22 (on a scale of between -100 and +100) and we are determined to improve this for employees. In 2024 we plan to introduce Wellbeing Champions across the organisation who will support colleagues on a variety of topics related to wellbeing, directing them to existing resources. We hope that this initiative will help us raise awareness, reduce stigma and increase engagement on wellbeing issues among our employees.

Community Engagement

Community Day – Volunteering

Community engagement is important to FE fundinfo because we want to make a positive impact on the societies and environments we operate in. We encourage our employees to volunteer their time and skills to support local charities and causes that align with our values and vision through our 'Community Day' initiative. By volunteering and giving back, we not only help others, but also foster a culture of collaboration, empathy and learning within our organisation. In 2023, **10%** of our employee population utilised their 'Community Day' and took a day out of work to give back, representing an increase in participation of **0.5%** on the previous year. Community day initiatives included redecorating tired school classrooms, gardening at vulnerable people shelters, constructing toys and scrubbing play areas used by children with learning disabilities and more.



"In Brno we were delighted to volunteer at an elderly people's home. We helped spruce up their outdoor area by weeding the garden and washing the furniture. It was fantastic to spend time outside with colleagues and see the benefits of our efforts at the end. It was a rewarding and fun way to use our Community Day."

Monthly donations

Each month, FE fundinfo makes a donation to a charity nominated by one of our office locations, identifying causes that resonate with employees. In 2023 we supported a wide range of charities, including those that support sick or vulnerable children, clearing up our oceans, men’s health, crisis appeals and many more.

Corporate sponsorship

In 2023 we were also pleased to continue to be corporate sponsors of Urban Synergy, a UK-based youth empowerment charity who work to build an equitable world where everyone, regardless of their background, is empowered to write their own future.

FE fundinfo was delighted to welcome a group of students to the London office as part of an Urban Synergy Insight Day. The aim was for the students to gain valuable experience in a workplace setting and take part in various activities, including a recruitment workshop.

“

The Insight Day was a valuable opportunity for us to share our insights and experiences with the students, as well as learn from their perspectives and aspirations. We hope that this event will help them discover new possibilities and pursue their goals with confidence and courage.”

Megan Perry
Human Resources



Governance, Business Culture & Ethics

As a global company with a diverse client base, we recognise the importance of strong governance at FE fundinfo. We are committed to conducting our business in a transparent, accountable and responsible manner, respecting the laws and regulations of the countries where we operate and adhering to the highest ethical standards. We have a clear governance structure that defines the roles and responsibilities of our board, management and staff, and ensures effective oversight and decision making.

Our policies are consistently reviewed, revised and socialised with staff to support effective working practices. All employees are required to complete mandatory compliance activities when they join us and every year thereafter. Our compliance activities include annual assessments with minimum pass rates for Competition Law, Data Protection Awareness and Security Awareness. Other policies require annual attestations, including Anti-Bribery and Corruption, Modern Slavery, Human Rights, Global Sanctions, Health and Safety, and Anti-Harassment and Anti-Discrimination, among others. Our global annual compliance activities are typically launched in November. By the end of December 2023, over **90%** of all November compliance activities were complete, any outstanding activities were being followed up to completion. These measures help us foster a culture of integrity, accountability and excellence across our organisation.

We also have a Code of Conduct that sets out the principles and values that guide our behaviour and interactions with our stakeholders. We expect all our employees to act in accordance with this Code and report any violations or concerns through our whistleblowing policy. By embedding good governance, business culture and ethics in our operations, we aim to create long-term value for our clients, shareholders, employees and society.

Cybersecurity & Data Privacy

Cybersecurity and data privacy are essential aspects of our business. We follow the highest standards and comply with relevant regulations and industry best practices. We monitor and improve our cybersecurity and data privacy policies, procedures and controls to prevent, detect and respond to potential threats and incidents. We foster a culture of awareness and responsibility among our staff and partners, and provide regular training and guidance on cybersecurity and data privacy matters.

Last year we committed to introducing cloud-based role management to enable the use of time and approval-based role activation to further mitigate risks of excessive or unnecessary access to resources within the organisation. This has now been implemented.

In 2023 we introduced an Insider Risk Management tool, which reports on when data is ex-filtrated outside of the organisation. We extended independent penetration testing to further ensure that our cybersecurity defences are adequate and effective against external attacks. Furthermore, we continue to:

- Revise policies, practices and internal assessments on cybersecurity and data privacy
- Require all new joiners to complete training and assessments on Security Awareness and Data Protection Awareness and require all employees to retrain and take reassessments annually
- Introduce our security and data protection frameworks for newly acquired companies to ensure a consistent approach across our offices
- Maintain ISO 27001 certification, the international standard for information security, cybersecurity and privacy protection
- Utilise internal phishing testing which automatically allocates further training to employees where required
- Carry out comprehensive security testing, including network security testing, application security testing, static code analysis and internal network scanning

Our commitment

We are committed to protecting the confidentiality, integrity and availability of our data, systems and services, and ensure the privacy rights of our stakeholders.

Artificial Intelligence

For the first time, Artificial Intelligence (AI) appears in our materiality assessment, reflecting its growing importance and impact in the business world and society at large.

We believe AI is a powerful tool that can enhance our products and services, improve our efficiency and productivity, and enable us to deliver better value to our customers.

However, we recognise the risks and challenges that AI poses, including in data security, intellectual property, accuracy, bias, compliance and ethical implications. We take steps to address and manage these considerations responsibly across the business.

We have a documented process for triaging and evaluating AI ideas, which involves the AI team, the Information Security team, as well as the relevant stakeholders to ensure we are exercising precaution while maximising benefits.

AI tools and custom solutions

We're committed to boosting productivity and optimising workflows through AI third-party tools and custom developed solutions, aiming to deliver better outcomes for our clients and users, focusing on areas such as content creation, data quality improvements and client onboarding.

AI 3rd Party tools

- **GitHub Copilot:** AI coding assistant that helps us write code faster and more efficiently.
- **Copilot for M365:** We became part of the Early Adoption Program for this tool in October 2023 and have been using it to help us improve processes and save time with Business As Usual (BAU) activities.
- **ChatGPT Prompt Manager:** Secure internally created tool that uses AI to generate prompts and responses for content gathering and creation (ChatGPT with additional security policies)

Custom AI Development

- One of our main focus areas is improving data quality and client onboarding, which are crucial for our business success and reputation
- Our AI team collaborates closely with managers to determine the most effective areas for enhancement, which is maintained throughout the build, test and release of the new solution

Our commitment

- We are committed to strengthening the adoption of AI tools and promoting the benefits and effectiveness of AI solutions to the wider business to further increase efficiency, quality and value
- We will continue to monitor and manage the risks and challenges associated with AI and ensure that we use AI in a responsible and ethical manner

Conclusion

We are proud of the progress we have made in advancing our sustainability goals and recognise that there are significant improvements we can continue to make.

We believe that sustainability is not only a moral duty, but also a strategic advantage that enables us to create long-term value for our customers, employees, shareholders and society.

We thank our stakeholders for their continued support and collaboration, and we look forward to working with them to achieve our shared vision of a more sustainable future.

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



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