



Sustainability Report

2024

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Message from our CEO Liam Healy

Welcome to our 2024 Sustainability Report.

At FE fundinfo, sustainability is more than a strategic priority — it's a reflection of our values and how we operate every day. As a business built on trust, connectivity and innovation, we understand the importance of acting responsibly and transparently across all areas of our work. This report captures the progress we've made in Environmental, Social and Governance (ESG), and the steps we're taking to build a more inclusive, ethical and resilient organisation.

I'm proud of the way our teams have embraced this journey — from refining our carbon accounting and strengthening our cybersecurity, to deepening employee engagement and supporting our communities. We've also taken a thoughtful approach to emerging technologies like AI, ensuring they're used responsibly and in line with our values.

Looking ahead, we remain committed to listening, learning and evolving. Thank you to everyone across FE fundinfo who has contributed to our sustainability efforts. Together, we're building a future that reflects who we are and what we stand for.



Liam Healy
Chief Executive Officer
FE fundinfo

ESG governance

At FE fundinfo, strong governance is the foundation of our sustainability journey. Our commitment to Environmental, Social and Governance (ESG) principles is embedded at the highest levels of the organisation, ensuring that responsible business practices are not only encouraged but actively led.

ESG governance structure

Our ESG Governance Structure ensures accountability and engagement at every level of the organisation — from strategic oversight by the Board to active participation by all FE fundinfo employees.

This pyramid diagram represents the structure of ESG governance at FE fundinfo. Divided into four horizontal layers, from top to bottom, it demonstrates a top-down governance model where ESG responsibilities cascade from leadership to all employees. It should be noted that employee voice is a key element in shaping our sustainability strategy, ensuring that our approach reflects the insights and priorities of those across the organisation.

Our annual materiality assessment and approach to transparent reporting (included in this report) are also key elements of our ESG governance.



Board	Positioned at the top, indicating ultimate oversight and strategic direction.
ESG committee	Showing senior-level coordination and leadership on ESG matters.
ESG workstreams	Representing focused initiatives or task groups working on specific ESG topics.
All FE fundinfo employees	Forming the base of the pyramid and highlighting that ESG engagement is organisation-wide.

ESG committee leadership

Our ESG Committee, chaired by CEO Liam Healy, has been in place for over a year and plays a pivotal role in shaping and overseeing our sustainability strategy. The committee brings together senior representatives from across the business including Finance, Legal, Human Resources, Marketing, Product, Technology and Security, ensuring a holistic and cross-functional approach to ESG governance.

This diverse representation enables us to integrate ESG considerations into decision-making processes across all areas of our operations — from product development and data security to employee wellbeing and regulatory compliance.

Looking ahead

As we continue to evolve our ESG governance framework, we remain committed to transparency, accountability and continuous improvement. Our ESG Committee will continue to meet regularly, monitor progress and ensure that sustainability remains a strategic priority for FE fundinfo while navigating the changing political landscape.

Materiality assessment

As part of our comprehensive materiality assessment, we set out to gain a deeper understanding of our stakeholders' expectations, concerns and viewpoints, alongside identifying ESG-related opportunities and risks for our business. Recognising the dynamic nature of the ESG landscape, we consider it essential to regularly revisit and update our assessment to reflect emerging issues and evolving priorities. This process included collecting and analysing insights from key stakeholders, as outlined 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 and services reading lists and web-scan of FE fundinfo and our peers against ESG topics

The chart below highlights the ESG issues we have identified as most material to FE fundinfo, based on their significance to both our external stakeholders and our internal business priorities. From an initial much larger list of potentially relevant ESG topics — reflecting our role as a leading financial data company — these represent the areas of greatest current importance.

Our materiality assessment provides a consolidated view aligned with our business strategy across all operating regions. We recognise that the relevance of each ESG topic may vary depending on local market contexts and stakeholder needs. Additionally, we acknowledge that there are other ESG issues not captured in the chart that remain integral to our ongoing commitment to sustainability and responsible business practices.



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 and labour conditions

Governance

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

Transparency in reporting

We know that being transparent in how we communicate on issues of sustainability is essential for the following reasons:



For the second year in a row, we are reporting with reference to the Global Reporting Initiative (GRI) standards. We believe that referencing this framework supports transparent and evidence-based communication. This also enables our stakeholders to reference year on year progress through consistent and comparable metrics.

We also recognise that there is always scope for enhancing our sustainability strategy and our reporting in this rapidly evolving landscape.

Climate change mitigation & energy management

At FE fundinfo, we are committed to understanding and managing our environmental impact through robust carbon accounting practices. This year, we continued to strengthen our approach by working with third-party experts at Diligent, whose support has been instrumental in enhancing the accuracy and completeness of our emissions data.

Refining our estimates

As part of our commitment to improving the accuracy of our data we have sought the consultation of third-party expertise to calculate estimates for data where activity or spend data is not available. This covered estimates for the following activity types and the associated percentage of leased office area based on floor space:

Scope	Activity type	Percentage of total leased office space for which estimates have been made for activity type
Scope 1	Natural gas	32%
Scope 2	Purchased electricity	16%
Scope 3	Landfill waste	85%
	Recycling waste	85%
	Water consumption	50%
	Refrigerants from air conditioning units	50%

We know that these data accuracy enhancements help to provide a more robust foundation for setting reduction targets, and we continue to work with our third-party provider on this endeavour.

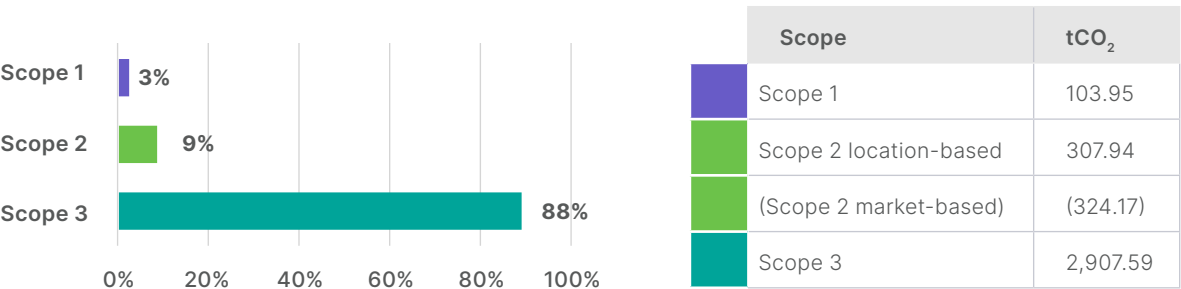
Services spend

We undertook a comprehensive review of our service-related spend, enabling us to incorporate a broader and more representative dataset into our carbon footprint analysis.

Validating our data

While we have published our carbon data figures below (with further data stated within the GRI index at the end of this report), they have not yet undergone external assurance. As part of our sustainability journey, we are actively exploring third-party assurance options to enhance the credibility, transparency and accountability of our reporting.

Carbon data 2024



Our Scope 3 data includes the following categories:

- Purchased goods and services
- Fuel-and energy-related activities not included in scope 1 or 2
- Waste generated in operations
- Business travel
- Employee commuting
- Employee working from home estimates
- Use of sold products
- Upstream leased assets

Business travel & Versatile working

As part of our commitment to responsible business practices, we continue to take a thoughtful approach to business travel. We recognise the value of face-to-face interaction in building relationships, fostering collaboration, and driving innovation. However, we also acknowledge that not all meetings require physical presence. By making effective use of video conferencing and other digital tools, we reduce unnecessary travel, which in turn has an impact on our carbon footprint, while maintaining strong connections across teams and geographies. This approach is aligned with our Versatile Working principles, which support a balanced blend of in-office and remote work. We encourage colleagues to come together in person to strengthen team bonds and cross-functional collaboration, while also valuing the flexibility to work from home, supporting wellbeing and work-life balance.

Cloud usage

By leveraging cloud-based services, we can optimise our operations while supporting our efforts to manage and reduce our carbon footprint through more energy-efficient infrastructure and scalable digital solutions.

Diversity & Belonging

Diversity & Belonging are integral to our sustainability strategy, underpinning our commitment to creating a resilient, inclusive and future-focused organisation.

2024 marked a year of meaningful progress in our Diversity & Belonging journey at FE fundinfo. As part of our commitment to fostering an inclusive workplace culture, we leveraged insights from our third-party employee survey platform to better understand how our people experience diversity and inclusion across the organisation.

We measured sentiment at two key points during the year using the Employee Net Promoter Score (eNPS), which ranges from -100 to +100. In April, our overall Diversity & Inclusion eNPS stood at 41. By October, this had risen to 50 — an encouraging 9-point increase that reflects our considered approach and the impact of our initiatives.

These insights are more than just metrics — they help us assess the effectiveness of our current strategies and identify areas for further improvement. We recognise that building a culture of belonging requires more than policies and data; it demands intentional action, lived experiences and continuous engagement.

In 2024, we introduced several initiatives to strengthen our foundations and bring our values to life. These included:

- **A key data review for our gender and ethnicity categories** – Following a comprehensive review in collaboration with our Diversity & Belonging Employee Resource Group, we refined the categories used to collect ethnicity and gender data. This process ensured that the options available are more meaningful, inclusive and reflective of the diverse identities within our workforce. These updates support our commitment to accurate representation and help us better understand and respond to the needs of our people.
- **Introduction of unconscious bias awareness training** – for all colleagues as part of our commitment to fostering a more inclusive and equitable workplace. This training supports greater awareness of implicit biases and encourages more thoughtful, inclusive decision-making across all levels of the organisation.

- **Our “zoomers to boomers” webinar** – bringing together colleagues from across generations and global locations to explore the unique perspectives, challenges and opportunities of intergenerational collaboration. The panel discussion highlighted how diverse age groups can learn from one another and contribute to a more inclusive and connected workplace culture.

“

One of the most powerful things about working across generations is the opportunity to challenge assumptions—whether it’s about technology, communication styles, or career expectations. When we listen to each other with curiosity, we build a stronger, more inclusive workplace.”

Suja
Client Success, United Kingdom

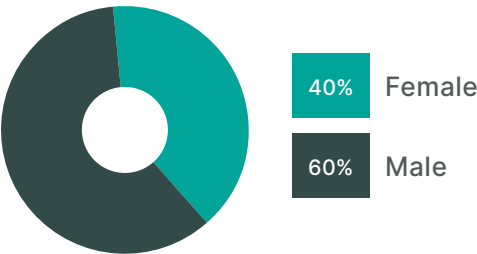


- **An International Women’s Day webinar** – a global webinar featuring panellists from multiple locations who shared their perspectives on gender equality in the workplace. The discussion focused on both the challenges and opportunities in advancing inclusion, with inspiring reflections on how individuals and organisations can actively contribute to creating more equitable environments.
- **Thoughtful communication on inclusion dates** – sharing targeted communications to mark key inclusion events throughout the year, including Pride and Autism Awareness Day. These messages aimed to raise awareness, celebrate diverse identities, and encourage meaningful conversations across the organisation, reinforcing our commitment to building an inclusive and informed workplace culture.

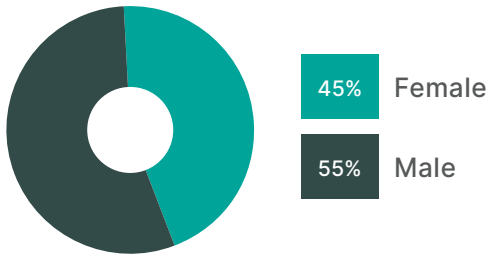
Gender data

In 2024, we committed to ensuring that at least 40% of our senior leadership team comprised women, and we're pleased to report that we exceeded this target, achieving a representation of 45%.

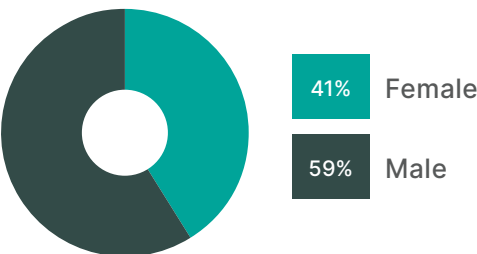
Executive leadership team



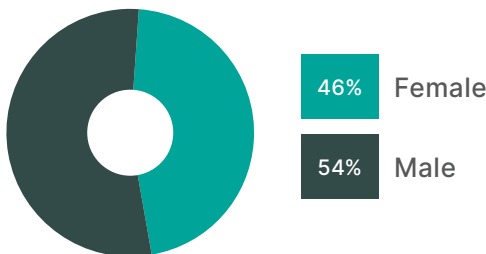
Senior leadership team



Manager



All other employees



*Excludes managers already counted in Executive Leadership Team and Senior Leadership Team.

While our overall gender split stands at **45% female and 55% male**, we recognise the importance of understanding the broader context behind these figures. Gender representation varies across our global locations, and we continue to analyse these patterns to ensure our diversity and inclusion efforts are responsive, equitable and reflective of our workforce and industry.

Ethnicity data

In 2024, we updated our ethnicity data categories for office regions where data collection is permitted and meaningful. This included a more detailed breakdown for Australia and the UK, ensuring greater relevance and inclusivity. In other locations, data was not collected due to either legislative restrictions or feedback from employees indicating that such data would not provide meaningful insights.

Ethnicity	Percentage
Information not provided	45.8%
White	44.6%
Asian	4.9%
Black, African, Caribbean	2.5%
Middle Eastern	0.6%
Multiple ethnic groups	0.6%
Prefer not to say	0.6%
Native Hawaiian or Other Pacific Islander	0.3%

Looking ahead

In anticipation of the EU Pay Transparency Directive coming into effect in June 2026, we are proactively reviewing all of our job roles and descriptions, not just in our EU locations. This initiative reflects our commitment to fostering transparency, equity and inclusion in our workplace. By aligning our job architecture with the directive’s requirements, we aim to ensure greater clarity in how roles are defined, evaluated and rewarded, supporting fair pay practices and reinforcing our broader sustainability and people strategy.

We recognise that Diversity & Belonging is a continually evolving area, and that what resonates in one region may differ in another. That’s why we remain committed to listening to our employees and delivering global initiatives that foster unity, while adapting thoughtfully to local needs and cultural contexts.

Attracting & engaging talent

Recruitment

In 2024, we made significant progress in strengthening our ability to attract, engage and retain the right talent. We reduced reliance on third-party recruitment agencies, eliminating agency spend in both Europe and India. By consolidating all contractor and temporary hiring through our Talent Acquisition (TA) team, we improved the quality of hires and deepened candidate engagement with our employer brand.

To support employees' long-term growth, we introduced our **Careers Conversation** initiative, giving colleagues the opportunity to connect directly with our TA Manager for career guidance, skill development insights and personalised advice.

We also strengthened our employer branding, launching a dedicated **LinkedIn Life** page to showcase our culture and values. We launched a dedicated LinkedIn Life page to showcase our culture and values, including a new company culture video to provide candidates with a clearer view of what it's like to work here.

We introduced an **AI-friendly job advert template** designed to improve engagement and remove biased wording and rolled out **recruitment training sessions in India** covering best practices from inclusive job descriptions to interviewing skills.

To embed our values more deeply into recruitment, we developed **value-based interview questions** and created a **LinkedIn Learning path for hiring managers** to further strengthen their skills in inclusive and effective hiring.

These efforts contributed to a candidate average feedback score of **9.30/10**, reflecting excellence in speed, quality and effectiveness.

Employee Engagement

We know that employee engagement is essential because it drives performance, fosters a positive workplace culture, and helps attract and retain top talent by ensuring people feel valued, heard, and connected to the organisation's purpose.

2024 marked the first full year of using Peakon as our dedicated employee engagement platform. We introduced a bi-annual survey cadence to ensure regular, meaningful feedback from our people. We're pleased to report that participation has consistently remained above 90% because we know that the more people who respond, the more accurate the results and the better placed we are to address what really matters to our workforce.

During our April 2024 survey, key global themes identified included meaningful work and strategy as areas to work on. In 2024 we introduced our Senior Leadership Team as a collective group working closely with the Executive Team to help communicate and embed our strategy and goals across the organisation. This enhanced structure has been designed to strengthen employees' connection to our mission and ensure greater clarity around how individual roles contribute to our broader objectives.

We're pleased to report that participation has consistently remained above 90%. This high level of engagement helps ensure the results are accurate and enables us to focus on what truly matters to our workforce.

While we're encouraged by the progress we've made, we recognise that there is always more to be done. Engagement is not one-size-fits-all, and different themes resonate more strongly across various locations and teams. That's why it's essential we continue to align our actions with shared insights across the organisation, while adapting them to meet the specific needs of our people in each location.

Local initiatives

As always, FE fundinfo's approach is to think global and act local, and this is reflected in the wide range of locally led events and initiatives across our offices — empowering teams to make a meaningful impact in their communities while contributing to our global sustainability goals. Here are just a few examples from 2024:

- In Australia, colleagues launched a series of lunch and learn events designed to bring employees together in an informal setting to hear directly from senior leaders. These sessions focused on key aspects of our business strategy and helped translate high-level goals into locally relevant actions
- In Switzerland, regular 'open-door' hours were introduced to foster more open communication and knowledge-sharing between leaders and teams. Employees are encouraged to ask questions freely, helping to build trust, transparency and stronger connections across the organisation
- In the UK, our engagement survey highlighted the need to better utilise office spaces, with a focus on social connection. In response, our UK teams hosted a charity bake-off, raising funds for Macmillan Cancer Support and bringing colleagues together across offices.



Learning and Development

At FE fundinfo, learning and growing are essential to thriving in a rapidly evolving environment. We recognise that development happens in many ways — from ad hoc learning on the job and peer collaboration, to organised knowledge-sharing sessions, sponsored formal qualifications, and access to platforms like LinkedIn Learning. Our approach ensures employees build the right knowledge, skills, and behaviours to adapt, innovate, and succeed.

At FE fundinfo, our uniform performance appraisal system serves as a formal checkpoint to review development goals for all employees. It ensures consistency in feedback, supports individual growth, and helps align personal development with organisational priorities in a structured and transparent way.

Growing great managers

Our managers at FE fundinfo bring a rich mix of backgrounds, experiences and perspectives, and we're committed to supporting each of them in leveraging and growing their unique strengths within our organisational context. That's why we're delighted to offer our custom-built, externally facilitated 12-month Management Development Programme — designed to empower managers with the tools, insights and confidence to lead effectively and inclusively.

Since launching the programme in 2020, over 150 managers have taken part, representing 60% of our current manager population.

LinkedIn Learning

We continue to leverage LinkedIn Learning as a key platform for employee development, offering a wide range of topics to support diverse learning needs. We're pleased to report that the average number of videos viewed per user increased from 34 in 2023 to 38 in 2024, and average learning hours per viewer rose by 12%, reflecting growing engagement with self-directed learning.

Looking forward

- We're aiming to reach the ambitious goal of an eNPS (employee net promoter score) of 45 by the end of 2026 by actively listening to employee feedback and working collaboratively to turn insights into meaningful improvements.
- We know that having a strong, cohesive leadership team is essential for building an efficient, innovative, and resilient organisation, so we plan to invest in further training for our newly formed Senior Leadership Team to strengthen communication, collaboration and shared leadership. This initiative will help enhance team dynamics and leadership effectiveness across the organisation.

Employee health & wellbeing

At the heart of our organisation is a simple truth: our people are our greatest asset. Their wellbeing is fundamental to our long-term success, and we are committed to fostering a culture where every individual feels supported, valued, and empowered to thrive — both personally and professionally.

Wellbeing initiatives

In the past year, we've taken meaningful steps to enhance our approach to employee wellbeing. One of our key initiatives was the introduction of **Wellbeing Champions** — a network of employees across our locations who are trained in Mental Health First Aid. These champions serve as approachable, local points of contact for colleagues seeking support, helping to create a more open and supportive environment around mental health.

“

I am proud to be a Wellbeing Champion here at FE fundinfo. For me, wellbeing is not just about feeling good – it's about creating a work environment where we can be honest, support each other, and feel safe talking openly about mental health and stress.”

Lotte
Business Analysis, Denmark



To mark **World Mental Health Day**, we hosted a company-wide **corporate wellbeing session**, offering practical tools and insights to help employees manage stress, build resilience and prioritise their mental health. This event was well-received and reinforced our commitment to open dialogue and proactive support.

We also launched **'Refresh Fridays'** throughout August — an initiative designed to encourage rest and recharge. On these Fridays, we finish the workday a little earlier and aim to keep meetings to a minimum, giving our teams space to unwind and reflect, an important initiative in our wellbeing calendar.

Our annual Sports Day is actually a series of events hosted across different days and global offices, with activities tailored to each location — from yoga sessions and bowling to badminton, rounders, or even building cars! The aim is simple: to give colleagues a chance to unwind, connect and enjoy time together in a relaxed, fun setting outside of our usual work environment.

We're pleased to report that these efforts appear to be having an impact. Our Health and Wellbeing Employee Net Promoter Score (eNPS) rose from +19 in April to +31 in October (on a scale from -100 to +100), reflecting growing employee satisfaction in this area. This improvement is a clear signal that our focus on wellbeing is resonating with our people — and we remain committed to building on this momentum.

Looking forward

We recognise that we operate in a fast-paced environment, and that makes our commitment to employee wellbeing all the more important. In 2025, we will continue to host wellbeing-focused events through our network of Wellbeing Champions, ensuring that activities are shaped by the voices of our people — whether through surveys, feedback sessions, or informal conversations. By listening and responding to what our employees need, we aim to create a workplace where wellbeing remains a priority, not just a programme.

Human rights & labour conditions

At FE fundinfo, we are committed to respecting and promoting human rights and labour conditions across our organisation. 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.

To support a culture of integrity and transparency, we use a third-party whistleblowing platform that enables colleagues to report concerns anonymously and securely. All reports are reviewed and investigated in line with our internal procedures, ensuring that issues are addressed promptly and appropriately. This mechanism reinforces our commitment to ethical conduct, accountability, and a safe working environment.

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.

Community engagement

Volunteering

Through our **Community Day initiative**, FE fundinfo encourages all employees to take a day away from their desks to volunteer and give back to their local communities. This programme reflects our commitment to social responsibility and empowers our people to contribute to meaningful local initiatives. In 2024, **10% of our employees** dedicated a working day to volunteering, using their time and skills to make a positive impact beyond the workplace.



Chennai employees bring learning to life!

Volunteering at a local school, our team led a variety of engaging activities—from storytelling and science experiments to debates, drawing, and even building projects—creating memorable moments and inspiring young minds.

Supporting local charities

As part of our commitment to community engagement, FE fundinfo runs a monthly initiative where each of our offices selects a **local charity** to support. Through this programme, we donate **£1,000** each month to an organisation aligned to causes that matter to our people. In 2024 this included disease research, men's health support, charities that support sick children and many more.

Czechitas partnership

FE fundinfo began its partnership with **Czechitas** in **2023**, supporting the charity's mission to empower women in technology in the Czech Republic. In 2024 we continued this collaboration alongside The **Hg Foundation**, which is providing additional financial support. This combined funding will enable Czechitas to run **two Digital Academies**, a **job fair**, and support **two women through long-term online coding courses** via the Czechitas Endowment Fund. This partnership reflects our shared commitment to creating inclusive opportunities in the tech sector.

Employees from our **Brno office** play an active role in supporting **Czechitas** by volunteering as **mentors** to students participating in the charity's digital skills programmes. Through this engagement, our team helps guide and inspire individuals on their journey into technology careers.



"Volunteering with Czechitas has been an incredibly rewarding experience. Supporting women in developing digital skills not only contributes to a more inclusive tech industry, but also aligns with our values at FE fundinfo—empowering communities and driving meaningful change through education."

Jakub, Data Management, Czech Republic

Looking forward

We're excited to have committed to working with the social mobility charity **upReach**, as part of our ongoing efforts to support equity and opportunity. This partnership reflects our core values of **trust**, **connectivity** and **innovation** — building trusted relationships with future talent, creating meaningful connections between students and the industry, and supporting innovative approaches to career development. We look forward to supporting students throughout **2025**, helping to open doors to rewarding careers and a more inclusive financial services sector.

Business culture & ethics

At FE fundinfo, we believe that strong business ethics and a values-driven culture are fundamental to building trust with our stakeholders and delivering long-term, sustainable success. It's no surprise that Business Culture & Ethics consistently ranks highly in our materiality assessments, reflecting its importance to our people, clients, and partners. Anti-bribery & Corruption & Competition Law were also identified as key material topics and are captured within this section of our sustainability report.

We are committed to conducting our business in a **transparent, accountable** and **responsible manner**. This includes a deep respect for the laws and regulations in every country where we operate, and a proactive approach to ensuring compliance across all areas of our business.

Our **governance structure** provides clear oversight and supports effective, ethical decision-making at every level. Through well-defined policies, annual training and a culture of openness, we empower our teams to act with integrity and uphold the highest standards of conduct.

Maintaining high ethical standards and regulatory compliance is central to how we operate at FE fundinfo. Our annual compliance programme is designed to ensure that all employees are equipped with the knowledge and awareness needed to uphold our values and meet our obligations.

Each year, we conduct **mandatory assessments** with minimum pass rates in key areas including **Competition Law, Data Protection Awareness, and Security Awareness**. In addition, employees are required to complete annual attestations for a range of critical policies, such as **Anti-Bribery and Corruption, Prevention of Tax Evasion, Modern Slavery, Human Rights, Global Sanctions, Health & Safety, and Anti-Harassment and Anti-Discrimination**. In 2024, we further strengthened our commitment to inclusion and fairness by introducing **mandatory unconscious bias training** across the organisation. Annual compliance activities are launched in November. We actively monitor training completion and follow up with individuals where retakes or outstanding modules are required, ensuring full compliance across the organisation.

Certain areas of our business are subject to further **regulatory oversight**, and these teams undergo **more rigorous compliance activities** tailored to their specific obligations.

Through these ongoing efforts, we reinforce a culture of integrity and accountability.

Cybersecurity & data privacy

Cybersecurity and data protection are critical to FE fundinfo, our clients, and all stakeholders who rely on the integrity and confidentiality of our services. As this landscape evolves rapidly, so do we — continuously adapting our systems, policies and practices to stay ahead of emerging threats and ensure robust protection of sensitive information. Our commitment to security is embedded in everything we do, supporting trust, compliance, and operational resilience.

In 2024, we maintained our ISO 27001 accreditation across Luxembourg, India, Switzerland and the UK, successfully updating our systems and processes to meet the latest 2022 standard.

While FE fundinfo is not directly impacted by the EU Digital Operational Resilience Act (DORA), we proactively undertook work to support our clients who are — this included strengthening our supplier risk assessment processes to align with DORA's requirements for third-party ICT service providers.

In 2024, we launched our first-ever Red Team testing initiative, inviting an external party to rigorously assess both our physical and digital security. This proactive approach helps us identify vulnerabilities, strengthen our defences, and ensure we remain resilient against evolving cyber threats. We look forward to reporting back in 2025 with the results.

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 & 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
- 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

Looking forward

We plan to:

- Expand our ISO 27001 accreditation to include the Australia business
- Implement a security tool that enables further integration with software development
- Adopt the use of a third-party security operations centre (SOC) provider to review logs from all events we capture and raise an alarm (in addition to our in-house monitoring)
- Introduce an AI tool to support with client questionnaires to increase efficiency

Artificial intelligence

Our internal AI development has expanded and moved from creation to operation. As such emphasis is shifting from construction to efficiency. To do this we look to move to more efficient models as they become available; reduce or eliminate reprocessing of tasks and documents.

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. As a business we are very deliberate and thoughtful about how AI is applied. Tooling is targeted and linked to need.

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 third party tools

- **GitHub Copilot:** AI coding assistant that helps us write code faster and more efficiently
- **Copilot for M365:** Since being part of the Early Adoption Programme for this tool in October 2023 we have continued to use 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

- We continue to focus on 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

Conclusion

As we reflect on 2024, it's clear that sustainability is not a standalone initiative at FE fundinfo — it's woven into the fabric of how we operate, grow, and support our people, clients, and communities. From strengthening our ESG governance and refining our carbon data, to deepening employee engagement and embracing responsible innovation, we've made meaningful progress across all pillars of Environmental, Social, and Governance.

We know that the world around us is changing rapidly, and we are committed to evolving with it — guided by transparency, collaboration and a shared sense of purpose. Looking ahead, we will continue to listen to our stakeholders, act on their feedback and invest in initiatives that drive long-term value and positive impact. Together, we are building a more inclusive, resilient, and sustainable future.

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

GRI contents index

GRI standard		Disclosure	Information or report location	
GRI 2:	General Disclosures 2021	2-1 Organizational details	a.	FE fundinfo Limited
			b.	Privately owned
			c.	London, UK
			d.	Other FE fundinfo locations can be found on FE fundinfo website
		2-2 Entities included in the organization's sustainability reporting		This report covers all our locations
		2-3 Reporting period, frequency and contact point	a.	01/01/2024 - 31/12/2024
			b.	The period for this report is the same as our financial reporting period
			c.	01/12/2025
			d.	Charlotte Mills, HR Operations (CSR@fefundinfo.com)
		2-4 Restatements of information		
		2-5 External assurance	a.	This report has been reviewed and approved by senior stakeholders who are part of FE fundinfo's ESG Committee
			b.	This report has not been externally assured
		2-6 Activities, value chain and other business relationships		See FE fundinfo website for information about our activities, value chain and other business relationships
		2-7 Employees		FE fundinfo employees c. 1105 as at 31/12/2024
		2-8 Workers who are not employees		FE fundinfo uses c. 55 contractors and 4 employer of record via Deel as at 31/12/2024
		2-9 Governance structure and composition		See FE fundinfo leaders
		2-10 Nomination and selection of the highest governance body		See ESG Governance and Materiality Assessment sections of this report
		2-11 Chair of the highest governance body		See ESG Governance and Materiality Assessment sections of this report
		2-12 Role of the highest governance body in overseeing the management of impacts		See ESG Governance and Materiality Assessment sections of this report
		2-13 Delegation of responsibility for managing impacts		See Materiality Assessment section of this report
		2-14 Role of the highest governance body in sustainability reporting		See Materiality Assessment section of this report
		2-15 Conflicts of interest		Specific Conflict of Interest Policies for Financial Express Investments Limited and Zenith Investment Partners Pty Ltd.
		2-16 Communication of critical concerns		See Human Rights and Labour Conditions section of this report
		2-17 Collective knowledge of the highest governance body		See ESG Governance section of this report
		2-18 Evaluation of the performance of the highest governance body		See ESG Governance section of this report
		2-19 Remuneration policies		
		2-20 Process to determine remuneration		
		2-21 Annual total compensation ratio		
		2-22 Statement on sustainable development strategy		See Message from Liam Healy section of this report
		2-23 Policy commitments		See Governance, Business Culture and Ethics section of this report
		2-24 Embedding policy commitments		See Governance, Business Culture and Ethics section of this report
		2-25 Processes to remediate negative impacts		See Human Rights & Labour Conditions section of this report
		2-26 Mechanisms for seeking advice and raising concerns		See Human Rights & Labour Conditions section of this report
		2-27 Compliance with laws and regulations		No significant instances of non-compliance with laws and regulations during the reporting period
		2-28 Membership associations		FE fundinfo is a member of the Investment Association (IA), The Investing and Saving Alliance (TISA), UK Sustainable Investment and Finance Association (UKSIF), Association of the Luxembourg Fund Industry (ALFI), Financial Services Council (FSC), Findas Danmark, Asset Management Association Switzerland (AMAS), BVI German Investment Funds Association, BaFin Federal Financial Supervisory Authority.
		2-29 Approach to stakeholder engagement		See Materiality Assessment section of this report
		2-30 Collective bargaining agreements		See Human Rights and Labour Conditions section of this report
GRI 3:	Material Topics 2021	3-1 Process to determine material topics		See Materiality Assessment section of this report
		3-2 List of material topics		See Materiality Assessment section of this report
		3-3 Management of material topics		See Materiality Assessment section of this report
GRI 201	Economic Performance 2016	201-1 Direct economic value generated and distributed		
		201-2 Financial implications and other risks and opportunities due to climate change		Climate Change Mitigation and Energy Management has been identified as a material topic to FE fundinfo and we are committed to understanding the risk and opportunities presented by rising temperatures, climate-related policy, and emerging technologies in a changing world. See section Climate Change Mitigation and Energy Management of this report for more information on our approach and aims.
		201-3 Defined benefit plan obligations and other retirement plans		
		201-4 Financial assistance received from government		
GRI 202	Market Presence 2016	202-1 Ratios of standard entry level wage by gender compared to local minimum wage		
		202-2 Proportion of senior management hired from the local community		
GRI 203	Indirect Economic Impacts 2016	203-1 Infrastructure investments and services supported		
		203-2 Significant indirect economic impacts		
GRI 204	Procurement Practices 2016	204-1 Proportion of spending on local suppliers		
GRI 205	Anti-corruption 2016	205-1 Operations assessed for risks related to corruption		FE fundinfo's procurement is mostly limited to professional or business services suppliers, such as catering, professional services and office equipment. FE fundinfo has assessed the level of corruption risk associated with its business and has put in place appropriate policies and procedures to mitigate such risks. FE fundinfo's procurement is mostly limited to professional or business services suppliers, such as catering, professional services and office equipment. FE fundinfo has assessed the level of corruption risk associated with its business and has put in place appropriate policies and procedures to mitigate such risks. These include but are not limited to an anti-bribery and corruption policy (which includes inducements, gifts and benefits), fraud prevention and tax evasion prevention policies, and a whistleblowing policy.
		205-2 Communication and training about anti-corruption policies and procedures		FE fundinfo's policies are reviewed and where appropriate, updated annually. All staff are required to completed a review and attestation of policies when joining the company, and annually on an ongoing basis.
		205-3 Confirmed incidents of corruption and actions taken		None
GRI 206	Anti-competitive Behaviour 2016	206-1 Legal actions for anti-competitive behavior, anti-trust, and monopoly practices	a.	None
			b.	None
GRI 207	Tax 2019	207-1 Approach to tax		
		207-2 Tax governance, control, and risk management		
		207-3 Stakeholder engagement and management of concerns related to tax		
		207-4 Country-by-country reporting		
GRI 301	Materials 2016	301-1 Materials used by weight or volume		As a software company, the use of raw materials is not material to FE fundinfo
		301-2 Recycled input materials used		
		301-3 Reclaimed products and their packaging materials		
GRI 302	Energy 2016	302-1 Energy consumption within the organization	a.	Non-renewable energy 477,972 kWh
			b.	Renewable energy 25,793 kWh
			c.	Electricity consumption 503,765 kWh Heating consumption 354,236 kWh
			d.	
			e.	Total energy consumption 858,001 kWh
			f.	From activity data where available and estimates based on office space where not available
			g.	<ul style="list-style-type: none">The Greenhouse Gas Protocol InitiativeEnvosDEFRA/DECCIEAAlBAustralian GovernmentEWZ
		302-2 Energy consumption outside of the organization	a.	
			b.	
			c.	<ul style="list-style-type: none">2024 UK Government GHG Conversion Factors for Company ReportingGHG Protocol, Emission Factors from Cross-Sector Tools March 2024IPCC, 2013, Climate Change 2013: The Physical Science Basis, Contribution of Working Group I to the Fifth Assessment Report of the Intergovernmental Panel on Climate Change.IEA (2024), Emission FactorsAustralian National Greenhouse Accounts Factors 2024. (Ref: Victoria)Australian National Greenhouse Accounts Factors 2024. (Ref: New South Wales)
GRI 303	Water and Effluents 2018	303-1 Interactions with water as a shared resource	a.	Water consumption has not been identified as a material topic for FE fundinfo as a software company. Water waste from our office locations has been included as part of our carbon accounting exercise and included in our Scope 3 figures.
			b.	
			c.	
			d.	
			e.	
			f.	
		303-2 Management of water discharge-related impacts	a.	
			b.	
			c.	
			d.	
			e.	
			f.	
GRI 304	Biodiversity 2016	304-1 Operational sites owned, leased, managed in, or adjacent to, protected areas and areas of high biodiversity value outside protected areas		
		304-2 Significant impacts of activities, products and services on biodiversity		
		304-3 Habitats protected or restored		
		304-4 IUCN Red List species and national conservation list species with habitats in areas affected by operations		
GRI 305	Emissions 2016	305-1 Direct (Scope 1) GHG emissions	a.	103.95 tCO2e
			b.	CO2, CH4, N2O
			c.	
			d.	N/A
			e.	<ul style="list-style-type: none">GHG Protocol, Emission Factors from Cross-Sector Tools March 2024IPCC, 2013, Climate Change 2013: The Physical Science Basis, Contribution of Working Group I to the Fifth Assessment Report of the Intergovernmental Panel on Climate Change.2024 UK Government GHG Conversion Factors for Company Reporting
			f.	Operational control
			g.	FE fundinfo's carbon emissions are calculated in line with the Greenhouse Gas Protocol Corporate Standard, using the operational control approach. Activity data is collected partly from local offices and centralised vendor reports. The data is gathered and calculated using a centralised software platform from Diligent, using relevant emissions factors for each activity. Emissions factors are sourced from relevant industry bodies. Estimations have been made for leased offices where activity data is not available.
		305-2 Energy indirect (Scope 2) GHG emissions	a.	307.94 tCO2e Location-based
			b.	324.17 tCO2e Market-based
			c.	Not available
			d.	
			e.	<ul style="list-style-type: none">GHG Emissions from Purchased Energy Version 2.1EnovosIEA (2024), Emission FactorsEuropean Residual Mixes, Results of the calculation of Residual Mixes for the calendar year 20242024 UK Government GHG Conversion Factors for Company ReportingEuropean Residual Mixes, Results of the calculation of Residual Mixes for the calendar year 2023Australian National Greenhouse Accounts Factors 2024. (Ref: Victoria)Australian National Greenhouse Accounts Factors 2024. (Ref: New South Wales)EWZ
			f.	Operational control
			g.	FE fundinfo's carbon emissions are calculated in line with the Greenhouse Gas Protocol Corporate Standard, using the operational control approach. Activity data is collected partly from local offices and centralised vendor reports. The data is gathered and calculated using a centralised software platform from Diligent, using relevant emissions factors for each activity. Emissions factors are sourced from relevant industry bodies. Estimations have been made for leased offices where activity data is not available.
		305-3 Other indirect (Scope 3) GHG emissions	a.	2,907.59 tCO2e
			b.	CO2, CH4, N2O
			c.	7.3 tCO2e
			d.	Business Travel, Employee Commuting, Fuel and Energy-Related Activities (not included in scope 1 and 2), Purchased Goods and Services, Waste generated in operations, Use of Solid Products, Upstream leased assets.
			e.	
			f.	<ul style="list-style-type: none">2024 UK Government GHG Conversion Factors for Company ReportingGHG Protocol, Emission Factors from Cross-Sector Tools March 2024IPCC, 2013, Climate Change 2013: The Physical Science Basis, Contribution of Working Group I to the Fifth Assessment Report of the Intergovernmental Panel on Climate Change.IEA (2024), Emission FactorsAustralian National Greenhouse Accounts Factors 2024. (Ref: Victoria)Australian National Greenhouse Accounts Factors 2024. (Ref: New South Wales)
		305-4 GHG emissions intensity	a.	tCO2e/number employees
			b.	Employee
			c.	Scope 1, 2 and 3
			d.	The GHG emissions intensity ratio includes Scope 1, Scope 2 and Scope 3 emissions, covering CO2, CH4, and N2O and has been selected to represent a fair comparison metric that accounts for scale and enables us to track efficiency over time.
			a.-d.	We do not report on emissions of ozone depleting substances (ODS) as these are negligible for FE fundinfo and our business' operations.
			a.-c.	We do not report on emissions of Nitrogen oxides (NOx), sulphur oxides (SOx), and other air pollutants as these are negligible to FE fundinfo and our business' operations.
GRI 306	Waste 2020	306-1 Waste generation and significant waste-related impacts		The production and management of waste is not currently a material topic for FE fundinfo. The main source is through our offices. We recycle across our locations where possible. Waste is calculated as part of our Scope 3 emissions.
		306-2 Management of significant waste-related impacts		
		306-3 Waste generated		
		306-4 Waste diverted from disposal		
		306-5 Waste directed to disposal		
GRI 308	Supplier Environmental Assessment 2016	308-1 New suppliers that were screened using environmental criteria		
		308-2 Negative environmental impacts in the supply chain and actions taken		
GRI 401	Employment 2016	401-1 New employee hires and employee turnover		
		401-2 Benefits provided to full-time employees that are not provided to temporary or part-time employees		
		401-3 Parental leave		FE fundinfo parental leave policies are aligned to local legislation in the countries within which we operate.
GRI 402	Labor/Management Relations 2016	402-1 Minimum notice periods regarding operational changes		
GRI 403	Occupational Health and Safety 2018	403-1 Occupational health and safety management system		Employee Health and Wellbeing is a focus for FE fundinfo and we take measures to ensure employees are supported in their physical and mental wellbeing. FE fundinfo maintains, regularly reviews and updates Health & Safety policies, aligned to local regulation, employees review and attest to these policies when joining, and on an annual basis. FE fundinfo highlights the importance of Employee Health and Wellbeing initiatives, see the Employee Health and Wellbeing section of this report for further information. In 2024 FE fundinfo had 0 reported work-related injuries.
		403-2 Hazard identification, risk assessment, and incident investigation		
		403-3 Occupational health services		
		403-4 Worker participation, consultation, and communication on occupational health and safety		
		403-5 Worker training on occupational health and safety		
		403-6 Promotion of worker health		
		403-7 Prevention and mitigation of occupational health and safety impacts directly linked by business relationships		
		403-8 Workers covered by an occupational health and safety management system		
		403-9 Work-related injuries		
		403-10 Work-related ill health		
GRI 404	Training and Education 2016	404-1 Average hours of training per year per employee		See Attracting and Retaining Talent section of this report.
		404-2 Programs for upgrading employee skills and transition assistance programs		
		404-3 Percentage of employees receiving regular performance and career development reviews		
GRI 405	Diversity and Equal Opportunity 2016	405-1 Diversity of governance bodies and employees	a.-b.	See Diversity and Belonging section of this report.
		405-2 Ratio of basic salary and remuneration of women to men		FE fundinfo is not in scope of UK Gender Pay Gap reporting for 2024 but have voluntarily published this information, which can be found on our Careers page of our company website.
GRI 406	Non-discrimination 2016	406-1 Incidents of discrimination and corrective actions taken	a.	We have not had any issues of discrimination involving FE fundinfo within the reporting period.
			b.	
GRI 407	Freedom of Association and Collective Bargaining 2016	407-1 Operations and suppliers in which the right to freedom of association and collective bargaining may be at risk		FE fundinfo has not been involved in any violations involving the rights of indigenous people.
GRI 408	Child Labour 2016	408-1 Operations and suppliers at significant risk for incidents of child labor		FE fundinfo has a zero-tolerance approach to modern slavery and we are committed to acting ethically and with integrity in all our business dealings and relationships and to ensure that modern slavery is not taking place in or on our business or in our supply chain. Our Modern Slavery policy is reviewed annually and where appropriate updated. All staff are required to review and attest to our Modern Slavery policy during the onboarding process and annually thereafter. See FE fundinfo's Modern Slavery statement on our company website.
GRI 410	Security Practices 2016	410-1 Security personnel trained in human rights policies or procedures		
GRI 411	Rights of Indigenous Peoples 2016	411-1 Incidents of violations involving rights of indigenous peoples		FE fundinfo has not been involved in any violations involving the rights of indigenous people.
GRI 413	Local Communities 2016	413-1 Operations with local community engagement, impact assessments, and development programs		See Community Engagement section of this report
		413-2 Operations with significant actual and potential negative impacts on local communities		
	Supplier Social Assessment 2016	414-1 New suppliers that were screened using social criteria		We seek to work with external professional services partners and suppliers who respect human rights, care about their own working conditions and adhere to the UN Guiding Principles on Business and Human Rights. Our Modern Slavery Act statement, which is reviewed and updated annually, explains our approach to human rights within our direct supply chain. For further details, see FE fundinfo's Modern Slavery statement on our company website.
		414-2 Negative social impacts in the supply chain and actions taken		
	Public Policy 2016	415-1 Political contributions		FE fundinfo does not make political contributions; therefore this topic is not currently material to FE fundinfo.
	Customer Health and Safety 2016	416-1 Assessment of the health and safety impacts of product and service categories		As a software company, FE fundinfo does not produce products that are sold to end-consumers. FE fundinfo's companies are B2B SaaS companies, therefore customer health and safety is not a material topic for FE fundinfo.
		416-2 Incidents of non-compliance concerning the health and safety impacts of products and services		
	Marketing and Labelling 2016	417-1 Requirements for product and service information and labeling		
		417-2 Incidents of non-compliance concerning product and service information and labeling		There have been no incidents of non-compliance concerning product and service information and labelling or marketing communications for the reporting period.
		417-3 Incidents of non-compliance concerning marketing communications		
	Customer Privacy 2016	418-1 Substantiated complaints concerning breaches of customer privacy and losses of customer data		There have been no complaints concerning breaches of customer privacy and losses of customer data.

Disclaimer: This report has been prepared with reference to (rather than in accordance with) the Principles of the GRI Standards. It presents information on our sustainability performance and impacts, and while it draws upon the GRI framework, it does not claim to report in accordance with the GRI Standards. For the avoidance of doubt, the disclosures are therefore not fully compliant with all nine requirements set out in section 3 of GRI 1.



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