



EdenTree's Commitment to Diversity & Inclusion





Our guiding belief

At EdenTree, we champion Diversity & Inclusion as part of our wider commitment to people and planet. We believe that embracing diverse perspectives and experiences strengthens our culture and supports our ability to deliver long-term value responsibly. Inclusion and sustainability guide how we work every day, shaping decisions and driving positive outcomes for clients, communities and the environment.

We uphold the principles of the Equality Act 2010 and are committed to fair, transparent practices. We report openly on our progress to ensure accountability and trust.



“ At EdenTree, our purpose is clear: to create long-term value for clients while making a positive impact on society and the environment. Diversity and inclusion are part of that bigger picture because they help us think differently and act responsibly. Progress comes from listening and learning, but also from turning ideas into action – something our Corporate Responsibility Committee does brilliantly. Recognition at the Women in Investment Awards this year was a proud moment for all of us, not just for what it says about inclusion, but for what it says about our culture and ambition. We’re building a business that is authentic, sustainable, and forward-looking. That means continuing to challenge ourselves, adapt, and lead with integrity. For me, leadership is about creating the conditions where every colleague can contribute and thrive – because that’s how we deliver for clients and communities. ”

Andy Clark
CEO



Our journey so far

Our Corporate Responsibility Committee is made up of colleagues across the business who care deeply about building a culture where everyone feels valued, heard and able to thrive. We listen closely to the lived experiences of our colleagues, stay curious about what inclusion looks like and work together to turn intentions into meaningful action.

We celebrate the moments that matter to our people — including Pride Month, Mental Health Awareness Week, Autism Awareness, Black History Month, International Women's Day, Men's Mental Health, and more. In 2025, we introduced Cuppa and Conversation during Mental Health Awareness Week — creating space for open, honest conversations about wellbeing.

Our CR Committee and colleague listening have strengthened our understanding of the diverse ways people experience work — shaped by identity, background and the paths they have taken. This insight helps us support colleagues in ways that feel relevant, respectful and meaningful.

We are proud of the progress we've made and know there is still much more to learn and build as we continue moving forward together.

Spotlight: We Can Be

For the past three years, EdenTree has partnered with the Lord Mayor's Appeal on the *We Can Be* initiative. This programme gives young women from local schools the chance to experience a day in finance, meet female leaders, and take part in interactive workshops that demystify the industry and empower them to see themselves in roles they might never have considered.

**The impact of this work is clear.
As the Lord Mayor's Appeal shared:**

“You and your colleagues were instrumental in organising a wonderfully memorable day for the young women that visited your offices. Visiting businesses, especially in the heart of London, can be the highlight of their school year... Through your participation this year, you have been a key contributor to closing those gaps in equality. **”**

Alderman Alastair King DL
The Rt Hon The Lord Mayor



Pamela Vaz
Head of Marketing

“Empowering young women to see themselves in careers in the City, particularly in finance, is about opening doors and changing perceptions. Through 'We Can Be', we're helping shape a more inclusive future for our industry. **”**



Accountability and oversight

Diversity and Inclusion efforts are led by HR and members of the Corporate Responsibility Committee, with ultimate oversight and commitment from the CEO and Executive Committee (ExCo). Two ExCo members also act as sponsors for our work, supporting our Corporate Responsibility Committee and championing local initiatives to drive progress.

Partnerships

Alongside our internal Diversity & Inclusion initiatives that support and engage our small team, EdenTree is taking active measures to broaden our talent pool and has partnered with a number of specialist firms and charitable organisations. These organisations support us in several ways - from refining job descriptions and advising on recruitment to providing training and raising awareness across our industry.

The organisations we are currently partnered with include:



The Benefact Group is also a founding member of the 30% Club and the Women in Finance Charter, a pledge for gender balance across financial services. EdenTree CEO Andy Clark acts as Executive Sponsor of the Women in Finance Charter for the Benefact Group.



Spotlight: Blind in Business

EdenTree is proud to support Blind in Business, a charity dedicated to helping blind and sight-impaired people into employment. Over the past three years, our partnership has benefitted 360 individuals, with EdenTree's funding and support enabling Blind in Business to deliver one-to-one and group-based training, giving participants the confidence to apply for jobs.

In 2025, EdenTree part-funded a residential waterskiing course, covering transport and activity costs for 29 graduates. The trip combined waterskiing activities with mock interviews and employability training, providing a unique opportunity for students to build confidence, resilience, and practical skills.

Our hosting of work experience placements has also contributed to the charity's positive impact. During these placements, students work on a mock project and present back to senior colleagues, helping them gain confidence and helping us understand how to remove barriers for future talent.



Student Testimonials

“ EdenTree's support has been transformative. It's not just about funding – it's about belief. Their commitment has helped us create opportunities that change lives, giving visually impaired young people the confidence and skills to succeed in competitive industries. **”**

Aleks, marketing student supported by Blind in Business

“ This week has been so useful as it has helped me to develop my transferable skills and get an in-depth understanding of what each department does. Everyone has been so welcoming. **”**

Annabel, student supported by Blind in Business

Blind in Business has achieved remarkable outcomes with EdenTree's support. In 2023–2024 alone, the charity helped 61 blind or sight-impaired people into work, delivered training to 285 school pupils, and supported 138 beneficiaries through expanded work experience opportunities.

Culture in Action

Building an inclusive culture

In January 2024, EdenTree embarked on a journey to create a blueprint of Purpose and Values that is unique to us, feels authentic and excites our people. The goal was to build a new collective identity that truly reflects the perspectives and experiences of people across the business.

We shaped our Purpose and Values together to reflect who we are and how we support one another every day. They've become part of how we think, act and invest. With leadership from the Corporate Responsibility and Executive Committees, and the commitment of colleagues across EdenTree, these values are now firmly part of our culture. They guide our decisions, how we support our communities and keep us accountable as we work towards a better tomorrow.

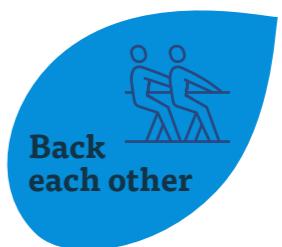
Our purpose

We transform the way people invest to build a better tomorrow

Our values



Bold and brave



Back each other



Own it

Embedding Culture in Our Recruitment Process

Hiring is part of our continuous journey of learning, listening and improving how we show up for each other and those who may join us.

For a while now, we have been successfully embedding our enhanced recruitment strategy, which includes a dedicated culture conversation with two members of Corporate Responsibility Committee at the final interview stage. It also creates a greater psychological safety for candidates, giving them space to meet colleagues who genuinely live our values, exemplify our culture and showcase the range of support available across EdenTree. They also give us the chance to understand what matters most to each candidate and ensure the experience is inclusive and respectful. We are also committed to developing a strong pipeline of future talent both internally and externally. Our focus is on reducing barriers at every stage of the career journey.

And, as always, if during the process we identify needs that we may not yet be meeting, we welcome that dialogue.

Targets & Measurement

Diversity & Inclusion data

At EdenTree, we recognise that every individual plays a vital role in shaping our culture and driving meaningful change. We harness lived experiences and support one another, recognising that inclusion is about more than numbers. To better understand our workforce, we run a Diversity & Inclusion survey every two years, alongside regular 'check in' surveys. We report our demographic data openly to clients and industry bodies, and we listen carefully to colleagues' feedback, grouping comments into themes and responding with a 'you said: we will' approach.

Our commitment goes beyond headcount. We focus on removing barriers, improving access and understanding the lived experience of our people. By tracking participation and disclosure, we ensure that progress is genuinely inclusive and trusted. This foundation enables us to set clear ambitions for the future, confident that our strategy is shaped by real voices and real needs.

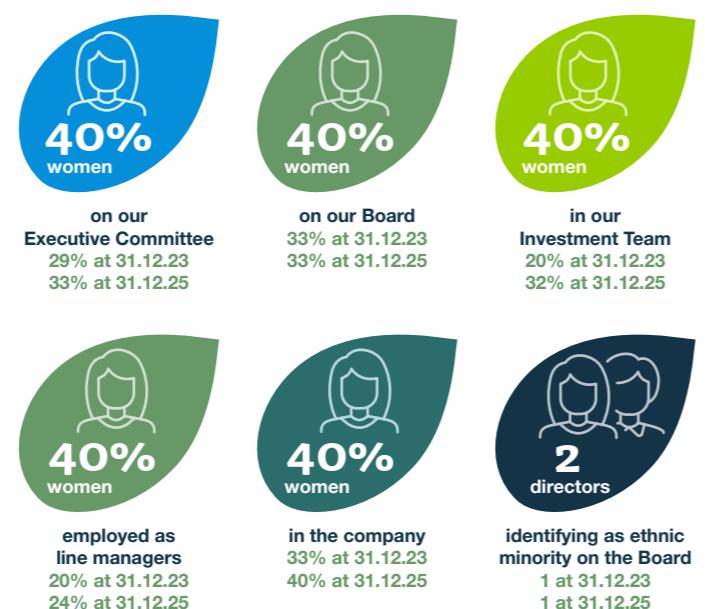
Targets

We are a small business with ambitious goals. We have spent the past year building out our Diversity & Inclusion strategy, engaging with a wide variety of specialists in areas such as gender diversity, ethnic diversity, social equality and neurodiversity.

We are striving towards an EdenTree that is reflective of the communities we serve and, alongside setting targets, are looking into how we can remove barriers for people at different stages of the process. Initiatives such as Investment 20/20, We Can Be and The Girls' Network help support this, and we will continue to look into initiatives and partnerships that identify the structural inequalities that exist and the means of overcoming them.

Here we outline the goals we have set ourselves to drive progress, aligning ourselves with the goals of the Women in Finance Charter.

By 2027 our ambitions are:



We are also committed to setting ambitious targets to improve the ethnic and socio-economic diversity within EdenTree and are currently actively engaging in listening initiatives to gain a deeper understanding of the diverse demographics of the communities we serve. We aim to create a more inclusive environment that reflects the diversity of our communities and ensures that every voice is heard and valued.

We will monitor progress towards these targets at least annually.



Vaida Gapsyte
Head of HR



Charlie Thomas
CIO

“ What stands out most to me is how we bring our culture to life every day. We are a company that shows up for one another. We stay brave, we listen, we ask questions and we welcome challenge, because what we do now helps set the tone for the kind of industry we want to shape. Having the chance to genuinely drive change is rare and it is a privilege we don't take lightly. **”**

“ We expect companies to show progress on the issues that matter and ACT helps us hold ourselves to the same bar in a way that drives real change. By testing our ambition against reality and sharing accountability, we make inclusion part of everyday decisions rather than a side project. That's how we build trust and transparency with colleagues and clients. **”**



Industry engagement

EdenTree is proud to be one of the first 50 signatories of the ACT Standard of Corporate Culture for Investment Companies, a new framework launched to create cultural change and enable professional fund buyers to drive a movement towards more diverse, equitable and inclusive firms. For more information on this global standard: [Investors ACT](#).

A Mutual Expectation

We seek to equip colleagues with the tools and resources to be engaged inclusion champions and allies. We offer support, time and training as well as a generous learning and development personal budget. In return, we welcome a high level of engagement in contributing to our positive corporate culture, whether big or small in scale and expect colleagues to support our Purpose and exhibit our Values and Behaviours.





**For additional information on
EdenTree and to find out more about
what our range of funds can deliver
for you and your clients, please get in
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0800 011 3821**

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We may monitor or record calls to improve our service.

**You can email us at
clientservice@edentreeim.com**

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www.edentreeim.com**

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The value of an investment and the income from it may go down as well as up and the investor may not get back the amount invested.



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