EdenTree Investment Management

Corporate Responsibility Report 2024-2025

A message from our Co-Chairs

Vaida Gapsyte and Jay Husbands-Alexander

Vaida Gapsyte
Co-Chair

Jay Husbands-Alexander
Co-Chair

As Co-Chairs of the Corporate Responsibility CR Committee, we are pleased to introduce this report and reflect on the progress made across EdenTree's CR work during 2024–2025.

Over the past two years, one of the most encouraging parts of this work has been seeing CR become more confident, more structured and more embedded in the way EdenTree works. We are making clearer choices about what we prioritise and why, and the work is increasingly shaped by what we hear from colleagues.

Our recent survey work has been particularly important in this respect, helping us understand the breadth of experience across the business, including social mobility, neurodiversity, health and caring responsibilities. For example, this insight directly shaped our focus on bereavement support, mental health and creating more informal spaces for discussion and feedback.

Listening to our people and partners

A core part of our Diversity and Inclusion commitment has been to listen more carefully to the experiences of our people and the communities we work with.

Over the past two years, we have taken a more structured and deliberate approach to this. Rather than relying on one source of feedback, we have brought together input from a range of channels to build a more complete picture.

This has included:

- **CR Drop-ins**, creating space for open, informal discussion across the business
- The **diversity survey**, helping us better understand the different experiences and needs within our workforce
- The wider **b-Heard survey**, which continues to provide a broad view of colleague engagement and sentiment
- A '**You said, we will' approach**, ensuring feedback is not only captured but responded to in a visible and accountable way

These channels have been important not just in gathering feedback, but in shaping how we respond.

Alongside this, we have continued to strengthen relationships with our external partners. This has allowed us to hear more directly from those working on the ground, helping us better understand the issues communities are facing and where support can be most meaningful.

This combination of internal and external listening has helped us move beyond assumptions. It has informed how we prioritise our time, how we design initiatives and how we think about the role of CR in supporting both our people and our purpose.

We are proud of the progress made, while recognising that our work continues to evolve. Our focus is on maintaining consistency, being open to challenge and continuing to listen with intent.

This Corporate Responsibility Report focuses on how we operate as an employer and within our local communities and environment. Our investment-related sustainability and stewardship activity is reported separately.

A different kind of business

Alongside our work as investors, we recognise the importance of holding ourselves to the same high standards we expect of the companies we invest in. This includes being transparent about how we operate as a business and the impact we have across our own activities.

Our Corporate Responsibility (CR) Committee plays a central role in supporting this. It is a colleague-led group that provides oversight and coordination of our approach, helping to ensure our activities are aligned, focused and effective.

The CR Committee oversees the key areas that shape our corporate impact, spanning our work with colleagues, communities and the environment, alongside oversight of the EdenTree Better Tomorrow Fund.

Membership reflects a broad cross-section of the business, bringing different perspectives into how our priorities are shaped and delivered. This Committee is led by Co-Chairs and supported by a Vice Chair, with shared responsibility for setting direction, engaging stakeholders and reporting into the Executive Committee, ensuring strong governance and clear connection to the wider business.

BENEFACT GROUP

Benefact Group

We are proud to be part of the Benefact Group, an international family of specialist financial services businesses. We are united by a shared ambition to do right by our customers and clients, and by a common purpose to give all available profits to charities and good causes.

Across specialist insurance, broking, advisory and investment management, each business in the Benefact Group brings deep expertise in its field. Together, we provide sustainable and impact investment, protection for specialist and heritage assets, and trusted advice to individuals and organisations, while using the success of our business to deliver a positive impact for society.

BENEFACT TRUST

Benefact Trust

The Benefact Trust places social purpose at the heart of our Group. Since 1972, the Trust has awarded over £330 million to organisations across the UK and Ireland, supporting initiatives that strengthen communities and address a range of social challenges. Its work is sustained by the Benefact Group, whose businesses contribute their available profits to the Trust.

BENEFACT GROUP 3RD LARGEST UK CORPORATE DONOR OVER A DECADE*

MOVEMENT FOR GOOD

3rd Largest Corporate Donor & Movement for Good

We are built on the belief that better business can improve lives. Benefact Group is one of the UK's leading corporate donors to good causes and has given over £275 million to charities since 2014. As a charity-owned group, it gives all available profits to good causes, supporting communities and organisations through initiatives including the Movement for Good awards.

*Directory of Social Change's UK Guides to Company Giving 2017-26

Our approach to Corporate Responsibility (CR)

At EdenTree, Corporate Responsibility (CR) is not separate to the day job. It is part of how we deliver our purpose and how we work together day to day.

Our purpose is clear: **we transform the way people invest to build a better tomorrow**. What matters is how that shows up in practice. For us, that means being thoughtful in how we work, taking responsibility for outcomes and continuing to learn and improve.

This matters particularly in a regulated environment where culture and behaviour directly influence judgement, decision-making and trust. Creating a culture where expectations are clear, where colleagues feel able to speak up and where we are willing to question and improve how we operate is fundamental to how we manage risk and deliver for clients.

Expectations from both clients and colleagues have evolved. Clients increasingly expect clarity on how culture supports good decision-making, while colleagues expect a working environment that supports openness, challenge and wellbeing.

This makes it important to stay focused on what genuinely supports a healthy culture. In practice this means creating an environment where people feel able to contribute constructively and take responsibility for outcomes.

CR is part of how we operate day to day, not a separate activity or a tick-box exercise. It informs the decisions we make as an investment manager and as an employer, and matters because our clients expect consistency in how we act. Ultimately, it comes down to our people and the standards they set and hold each other to. We've made progress, but there is more to do, and it remains an ongoing focus for the business.

Andy Clark
Chief Executive Officer

Governance and accountability

Our CR activity is overseen through a colleague-led Committee, with broad representation from across the business and formal support from the Executive Committee. The Committee provides oversight and coordination across EdenTree's CR programme, helping ensure activity remains aligned, focused and effective.

The Committee is led by two Co-Chairs and supported by a Vice Chair. Members are aligned to the core areas of People, Community and Environment, while also contributing across areas such as charity partnerships, volunteering, colleague engagement, communications, impact reporting and RFP support. This structure helps ensure ownership is clear, while still allowing the Committee to respond flexibly to business priorities and colleague feedback.

Our purpose

The CR Committee focuses on **three key pillars**:

People

Ensuring colleagues feel valued and safe to show up as themselves

- Diversity & Inclusion
- Recruitment & retention
- Mental Health & Wellbeing
- Social considerations
- Culture

Community

Supporting charities and collaborating to make a positive impact

- Charity partnerships
- Volunteering
- Employee engagement
- Collaborating with clients

Environment

Protecting our planet and tackling climate change

- Group Net Zero by 2040
- EdenTree's impact, including
  - Office impact
  - Carbon footprinting

The Committee meets on a bi-monthly basis, with agendas circulated in advance and minutes recorded with a focus on decisions and actions. A minimum of four members is required for a meeting to take place. Progress is monitored through agreed priorities, management information and regular review of activity against objectives.

The Co-Chairs are responsible for agenda setting, stakeholder engagement and reporting to ExCo. They provide regular updates as part of ongoing business engagement, supported by a formal update presented to ExCo on a semi-annual basis, or more frequently where required. This provides a clear route for input, challenge and escalation where activity requires senior oversight or where priorities need to change.

The Committee's Terms of Reference are reviewed at least annually to ensure the structure remains effective and appropriately representative of the business. Membership is voluntary and designed to reflect a broad cross-section of EdenTree, supporting the aim of embedding CR across the business rather than locating it within one function.

Culture and inclusion

Purpose and values

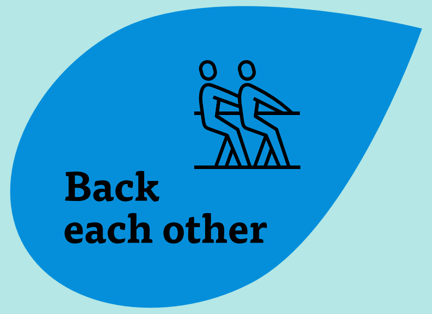
During 2024 and 2025, EdenTree's culture work became more embedded in everyday working life. Following the launch of our Cultural Blueprint in 2024, after extensive listening and co-creation with colleagues across the business, the focus shifted from defining the words to using them more consistently in practice.

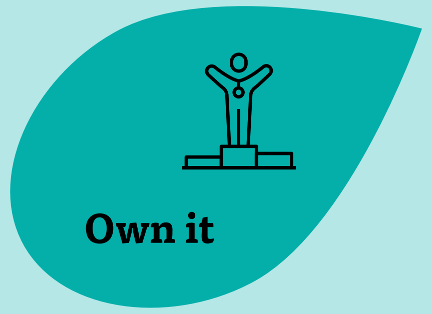
By 2025, purpose, values and behaviours were playing a clearer role in how we talk about expectations, culture and accountability across EdenTree. They are now reflected in our performance and development conversations, helping to reinforce not only what we deliver, but how we deliver it.

Our purpose

We transform the way people invest to build a better tomorrow

Our values





Back each other – We actively support our colleagues, trusting their intent and expertise.

Bold and brave – We think bigger and innovate how we work.

Own it – We each take responsibility for our part in EdenTree's growth.

Diversity, equity and inclusion

EdenTree's approach to diversity, equity and inclusion (D&I) became increasingly informed by colleague feedback and survey insight. This gave us a clearer picture of colleague experience and helped identify where more focus or support was needed.

The 2025 **D&I survey** achieved an 87% response rate, with low "prefer not to say" responses across key demographic questions. This gave us greater confidence in the data and in colleagues' willingness to engage openly with the process. Low levels of non-disclosure across demographic questions also provided a richer understanding of the diversity of colleague experience across the business. EdenTree's D&I survey is run every two years, alongside regular check-in surveys, with colleague feedback grouped into themes and responded to through a **"You Said: We Will"** approach.

The insight gathered has helped shape priorities across the People pillar and wider inclusion work, including wellbeing, bereavement support, psychological safety and ensuring learning reflects lived colleague experience. Findings have been reviewed through HR, the Corporate Responsibility Committee and ExCo, helping translate feedback into practical action.

This work sits alongside EdenTree's wider D&I commitments and targets, which are reviewed annually and include ambitions to improve representation across leadership and the wider business by 2027, with further detail set out in our D&I Commitment Statement.

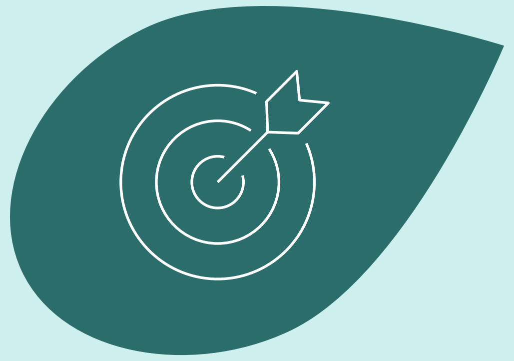
Our focus areas and activity

Across the three pillars, activity in 2024 and 2025 has been shaped by colleague feedback, engagement with charity partners and external organisations, and input and challenge from the CR Committee and ExCo. We have built on earlier activity, focusing more clearly on where to prioritise our efforts and how initiatives are delivered in practice.

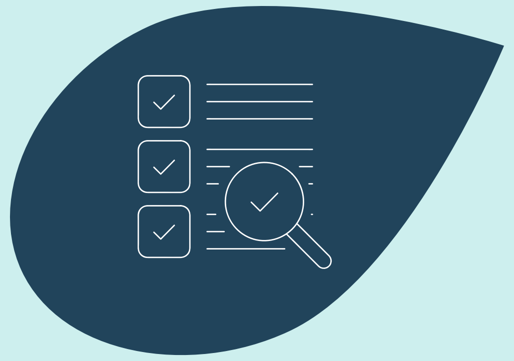
How we prioritise CR activity

1. Listen
We gather feedback from colleagues through the D&I survey, check-ins and CR drop-ins, engage with charity partners and external organisations, and monitor emerging issues and trends.

2. Assess
We assess potential activity against colleague experience, cultural priorities, EdenTree's Purpose & Values and strategic alignment.



3. Prioritise
We prioritise activity that is relevant to colleagues, aligned to our purpose and values, deliverable in practice and capable of making a meaningful impact.



4. Act and review
We implement activity, review outcomes and colleague feedback, and use those insights to refine our approach and future priorities.

People

Activity under the People pillar focused on mental health, bereavement support, inclusion and connection, shaped by what we heard from colleagues through surveys, conversations and ongoing engagement.

Feedback highlighted the importance of feeling supported through different life experiences, being able to speak openly and maintaining connection across teams, particularly in a hybrid working environment.

In response, the focus has been on practical support as well as awareness. **Mental health and wellbeing** have remained central, supported through communications and informal initiatives that are easy to access and relevant to how people work day-to-day.

Bereavement has also been a particular area of focus. Through partnerships such as Untangle Grief and Sands, colleagues have had access to sessions aimed at building understanding of grief, increasing confidence in conversations and offering practical guidance on how to support others.

Lunch & Learn sessions and CR drop-ins have also created **informal opportunities for discussion and feedback**, helping to keep our priorities grounded in colleague experience.

Spotlight - Untangle Grief

In January 2024, we began focused engagement on how we better support colleagues experiencing grief, recognising this as an area where greater understanding and confidence were needed across the business.

This led to a dedicated Coffee and Chat session in February 2024, titled *Understanding and navigating grief at work*. The session focused on building grief literacy, exploring how colleagues can support those who are bereaved, and creating a more open and confident approach to conversations around loss.

Importantly, this activity was shaped directly by feedback from our D&I survey, ensuring we were responding to real experiences and needs across the business. It reflects our wider approach, turning insight into meaningful, practical support for colleagues.

untangle

Spotlight - Sands

In October 2024, we marked Baby Loss Awareness Week with a dedicated webinar, creating space to raise awareness and support colleagues impacted by loss.

Building on this, a follow-up session was delivered in 2025 with a focus on men's bereavement and mental health, recognising that experiences of grief can differ and are not always openly discussed.

Across both sessions, the focus was on providing guidance, helping colleagues feel more confident in supporting one another, and signposting to further sources of help where needed. Together, these sessions reflect our ongoing commitment to creating a culture where sensitive conversations are approached with care, understanding and openness.

sands

Internal initiatives and company socials

Supporting connection, wellbeing and everyday culture

Alongside structured learning and wellbeing initiatives, Corporate Responsibility activity also supports internal initiatives and company wide socials that help strengthen connection, inclusion and a sense of belonging across the business.

These initiatives are designed to encourage colleagues to spend time together, support wellbeing and create informal opportunities for connection, particularly during busy periods or times of change.

Wellbeing and awareness initiatives

- Wellbeing activity delivered through accessible, low-pressure formats such as creative sessions and informal activities
- Initiatives designed to encourage conversation, reflection and peer support alongside more formal learning
- Cultural awareness activity recognising and celebrating important awareness days and heritage months, including Black History Month, South East Asian Heritage Month and Dia de los Muertos, helping to broaden understanding and encourage inclusive conversation across the business

Colleague-led social activity

- Regular company socials delivered across the year, including seasonal and informal events
- Activities organised with accessibility and inclusion in mind, allowing colleagues to participate in different ways

Examples of internal and social initiatives

- Creative and craft-based wellbeing sessions during awareness weeks
- Group walks and informal fitness initiatives
- Quiz nights, board game socials and other office based events
- Annual company events such as the Summer Party, Autumn or Winter socials, Christmas Party and Family Day

Community

Supporting charities and improving access and opportunity

Our Community pillar focuses on improving access, opportunity and social mobility through long-term partnerships, volunteering and targeted funding. We seek to support organisations whose expertise helps create meaningful outcomes for individuals and communities.

We place a strong emphasis on partnerships to shape how we approach Corporate Responsibility at EdenTree. Through our work with clients, industry groups and external organisations, we gain insight we wouldn't have on our own and keep our approach grounded in the real world. That also means being open to challenge and willing to adjust. This work with our partners has been a hugely enriching experience, including how we worked with the Green Schools Project to identify environmental outcomes for a new investment strategy, the learnings we gained from supporting Blind in Business on being supportive and inclusive, or the hugely inspiring passion of the students we hosted for the Lord Mayor's Appeal 'We Can Be' project. Over time, these relationships help us improve and deliver more consistent outcomes for clients and the communities we serve.

Philip Baker
Head of Distribution

Blind in Business

Our relationship with Blind in Business has continued beyond the original Community Fund partnership, evolving in a more practical and focused collaboration. The original partnership focused on helping blind and sight-impaired young people build confidence, develop employability skills and move from education into employment. It also helped EdenTree learn more about accessibility in practice, including how we support students and visitors in our own workplace.

During 2024 and 2025, we hosted work experience placements through Blind in Business, including placements where accessibility support, risk assessment and tailored arrangements were considered in advance. Three of the six work experience placements logged during the reporting period came through Blind in Business, making it an important part of our wider approach to early careers exposure.

The relationship has also influenced how the CR Committee thinks about work experience more generally. Where an internal work experience request is supported, CR seeks to balance this with opportunities through the charities and community partners we work with. This helps ensure that access to work experience opportunities support young people who may not otherwise have a route into the industry.

In 2025, we also made a contribution towards a Blind in Business Education to Employment training event. The event supported 12 participants and focused on building confidence, communication and practical employability skills.

"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, Blind In Business Work Experience Student

One of the most meaningful parts of the partnership has been the shared learning. Students have gained real exposure to the industry and EdenTree has learned more about what accessibility and inclusion mean in practice.

Investment 20/20

EdenTree supported Investment 20/20 as part of a wider commitment to improving access to the investment industry and helping young people, regardless of background, better understand the opportunities available. For many of us, a career in investment management was not something we set out to do from the outset, but something we discovered along the way. By sharing our experiences and increasing awareness of the industry, we hope to help young people better understand the opportunities available and make informed choices about their future.

In 2025, we hosted an Investment 20/20 Teacher Encounter Day, welcoming 20 teachers and careers advisers from state schools across London and the surrounding area. The session provided an opportunity to share insight into the investment industry, hear directly from colleagues across different functions sharing their experiences, discuss different career pathways and provide practical insight into day-to-day life within investment management.

Hearing colleagues speak openly about their own routes into the industry was one of the most valuable parts of the day. It helped make the sector feel more real, more accessible and easier for teachers to bring into future career conversations with students.

We believe teachers and careers advisers play an important role in shaping the opportunities young people consider. By sharing practical insight into the industry, we hope to support more informed career conversations and help more young people recognise investment management as a sector in which they can build successful and rewarding careers.

The Switch

EdenTree partnered with The Switch, an education charity supporting students in Tower Hamlets to build confidence, develop skills and gain insight into the world of work. Through this partnership, colleagues took part in volunteering opportunities including interview practice and careers-focused workshops, helping students prepare for future employment pathways.

Over the course of the partnership, colleagues contributed to a series of volunteering sessions across both virtual and in-person formats. These sessions provided a practical way for colleagues to share their experience, offer guidance and support young people at key stages of the recruitment process.

We Can Be

"EdenTree are proud to have partnered with the Lord Mayor's Appeal on the We Can Be programme for the past three years. This is an annual initiative to help young women build confidence, skills and ambition, while providing exposure to female role models across the City.

It has been a privilege to open EdenTree's doors each year and to welcome in a group of students. It's an incredibly important day in our calendar and one we all look forward to. I have the honour of pulling the day together and spending time getting to know the students. It's wonderful to be able to encourage them to see the opportunities that are available to them, demystify the industry and empower them to see themselves in roles they might never have considered."

Pamela Vaz
Head of Marketing

The Girls' Network

EdenTree partnered with The Girls' Network through mentoring and fundraising activity, supporting their work to inspire and empower young women from less advantaged backgrounds. The charity connects students with mentors and professional networks, helping to build confidence, raise aspirations and broaden awareness of career opportunities.

Alongside colleague participation in mentoring programmes, The Girls' Network was also supported through EdenTree's Big Swim campaign, which encouraged wide participation while raising awareness and funding for the charity.

This activity was further strengthened through alignment with the Benefact Group, including grant support delivered through Movement for Good. Together, this reflects a collaborative approach that combines colleague engagement with targeted funding to support charities focused on opportunity and inclusion.

Key initiatives - Spotlight

The Big Swim

Following its successful delivery in 2023, the nationwide participation event was repeated in 2024, building on the strong engagement and momentum generated in its inaugural year.

2024 Metrics

23,251 participants in 2024

32,292 total hours logged

Activity recorded across **118** countries

Supported fundraising for **The Girls' Network**

Christmas volunteering

Supporting local communities through practical, place-based activity

During the Christmas period, EdenTree promoted locally focused, seasonal volunteering and donation initiatives designed to support community organisations at a time of heightened need.

- Community food and essentials support
- Local Christmas fairs and community hubs, including Greener & Cleaner in Bromley
- Christmas toiletries collection in partnership with Street Talk, supporting vulnerable women

Participation was encouraged on an individual or small group basis, reflecting the local and informal nature of the initiatives, and engagement was not formally tracked.

National Numeracy

In 2025, EdenTree made a contribution to support National Numeracy's Number Heroes activity. This was a smaller initiative, but one that felt well aligned with our wider focus on education, confidence and opportunity.

Numeracy can shape how young people feel about themselves and the choices in career they believe are open to them, so supporting activity that makes numbers feel more accessible and less intimidating felt like a practical and worthwhile use of our community budget.

Work Experience and early careers exposure

During 2024 and 2025, the CR Committee has continued to build a more structured approach to work experience at EdenTree. Six students took part in work experience placements, with places offered through a combination of internal requests and our partnership with Blind In Business.

We aim to run the programme fairly and with purpose. Where an internal work experience request is supported, CR seeks to match this with one or two students through charity or community partners we work with.

The programme is led by the CR Committee and delivered with the support of colleagues from across the business who give their time to share their experience, explain their roles and help students understand how EdenTree works in practice. During the reporting period placements included structured programmes, cross-team exposure, ExCo interviews, project work and tailored support where needed.

Project work has also become an important part of the experience. Students are encouraged to explore an investment style question, apply EdenTree's sustainable investment framework and consider the engagement questions we might ask a company. Placements conclude with presentation and feedback from colleagues across the business, including representatives from sustainable investment and fund management. This gives students something practical to work on and helps build confidence in asking questions, thinking clearly and presenting their ideas.

For a small business, the programme takes time and coordination, but the impact is clear. It gives young people a more realistic view of the industry and helps make careers in investment management feel more visible and open.

Environment

The Environment pillar brings together the parts of our CR work focused on our direct operational impact and our support for practical environmental action beyond the business. Rather than sitting separately from our wider CR activity, it reflects the same approach: focusing on areas where we can act responsibly, learn from partners and make a meaningful contribution.

This section sets out both sides of that work: how we monitor and manage our own operational emissions, and how colleague volunteering and environmental partnerships have helped connect climate and nature-related issues with tangible activity in the community.

Case Study: Habitat Restoration Day with Thames21

As part of our commitment to supporting environmental charities, EdenTree colleagues swapped desks for wellies and joined Thames21 for a Habitat Restoration Day on Chiswick Eyot. The Eyot is a Local Nature Reserve and a rare island habitat, but its fragile banks are vulnerable to erosion, invasive species and the effects of rising water levels. Working with the Old Chiswick Protection Society, Thames21 is helping to restore and protect the island through carefully managed conservation days, ensuring volunteers can support the habitat without causing further damage to this sensitive site.

Our volunteering focused on practical work to improve river health and biodiversity. This included supporting vegetation management, helping stabilise the island's banks through traditional willow spiling, and tackling invasive plants such as Himalayan balsam, which can crowd out native species and contribute to habitat degradation. It was a hands-on reminder that even small, muddy interventions can make a real difference, helping to protect Chiswick Eyot's wildlife, strengthen its natural defences and preserve a unique part of the Thames for the future.

EdenTree's operational emissions

Given the nature of our business, EdenTree's direct carbon footprint is very small. We have no scope 1 emissions as we do not own any company cars and do not directly burn any coal, oil or gas. Our scope 2 market-based emissions are zero as 100% of our energy is sourced from renewable origins.

Our scope 3 emissions (excluding investments) have risen since 2020 due to an increased scope of reporting, which now covers the most material scope 3 categories. We have taken a more granular approach to assigning travel data, which explains why business mileage has decreased but air travel and rail travel have both increased. The sharp increase in travel emissions after 2021 was due to the post-pandemic bounce-back.

In terms of our energy use, our building at London Bridge has achieved an Energy Performance (EPC) rating of 'B' out of a range of 'A' to 'G' with a score of 30, placing it towards the higher end of the band, and is BREEAM-rated as 'Excellent'. In addition, our office equipment is low energy and recycled responsibly as part of our end-of-life due diligence programme.

	2020	2021	2022	2023	2024	2025
Scope 1 (gas)	0.65	0.00	0.00	0.00	0.00	0
Scope 2 (market-based electricity)	0.00	0.00	0.00	0.00	0.00	0.00
Scope 3[5]	0.14	0.49	27.7	21.7	27.61	23.1
Air Travel	0.12	0.34	2.19	8.10	13.17	12.7
Rail Travel	0.02	0.05	0.47	1.60	1.94	1.2
Business Mileage (own car travel)	0.00	0.00	23.14	11.3	11.76	9.1
Car Rental	0.00	0.10	1.19	0.00	0.00	0
Waste	0.00	0.00	0.57	0.20	0.06	0.06
Water Supplied	0.00	0.00	0.14	0.50	0.15	0.04
Total Scope 1, 2 & 3	0.79	0.49	27.7	21.7	27.61	23.1

All figures are reported in tonnes of CO_2e (tCO_2e)

[5]Scope 3 emissions as reported here does not include Scope 3, Category 15 emissions.

The EdenTree Better Tomorrow Fund

Moving from funding to long-term, impact-led partnerships

Through the Better Tomorrow Fund, EdenTree supports small London-based charities working across two broad areas: People and Planet.

The two organisations supported in our 2025–2028 cycle are Green Schools Project and YES Outdoors. The Fund is designed to provide multi-year funding, while also building constructive partnerships that support both the charities' work and EdenTree's own learning and engagement.

YES Outdoors

YES Outdoors is a North London charity supporting young people through mentoring, outdoor activities and skills development. Working across Islington, Camden, Haringey and Hackney, it delivers programmes such as year-long adventure-based mentoring, accredited cycle maintenance training and targeted employment support.

By combining practical skills with confidence-building experiences, YES Outdoors helps young people develop resilience, broaden aspirations and access pathways into work.

EdenTree is supporting YES Outdoors through multi-year funding and continues to explore practical ways to support the organisation, recognising that it operates as a very small, volunteer-led team.

Potential areas of support include organised bike collections to contribute to its cycle maintenance and provision programmes, further fundraising activity and introductions to relevant contacts across the Benefact Group.

The Green Schools Project

Green Schools Project is a UK-based charity that works with schools, teachers and young people to strengthen climate education and support practical climate action. Its programmes help schools embed sustainability into their culture and give students the knowledge, confidence and tools to take action within their schools and communities.

EdenTree's relationship with Green Schools Project developed through its involvement in the Endowments Investing Challenge. A key part of this work was creating space for students to share their views on the issues that matter to them and to see how those perspectives could inform a real investment strategy. The final strategy was presented on stage jointly with Big Issue Invest and young people from the Green Schools Project.

This relationship has since continued through Green Jobs workshops, where EdenTree colleagues have joined Green Schools Project in visiting local primary and secondary schools to talk about their careers and the role of green skills. In June, Aaron Cox, Impact Strategist, and Lydia Norman, Global Equity Associate Fund Manager, took part in a workshop, sharing their own career paths, the areas of work they are passionate about and how their roles connect with EdenTree's purpose of building a better tomorrow.

"Through our partnership with EdenTree, students were given a rare and meaningful opportunity to engage directly with the investment industry and see how their views can shape real-world investment decisions. By involving young people in discussions and workshops, EdenTree helped build confidence, broaden aspirations and demonstrate that a career in finance can be both accessible and purpose-driven. Several of our students left the programme with a clearer sense of their future pathways and a belief that their voices matter in shaping a more sustainable and inclusive economy. The experience has been genuinely transformative in opening doors for young people who may not otherwise have considered this career path."

Henry Greenwood,
Founder - Green Schools Project

In 2026, Green Schools Project will mark its 10th anniversary. EdenTree plans to support this milestone by co-hosting an event bringing together charities, corporates and other mission-aligned organisations to reflect on Green Schools Project's work and the partnership developed to date.

Partnership in action

Colleagues involved in the Endowments Investing Challenge shared their reflections on what the partnership meant in practice and how it shaped their thinking.

Green Schools Project and the Endowments Investing Challenge

EdenTree's collaboration with the Green Schools Project (GSP) formed a central part of our approach to the Endowments Investing Challenge, helping to ensure the strategy we built was shaped by the perspectives of those it intended to benefit – the future generation. Through a series of in-school workshops, students were invited to engage directly with the question of "where should we invest capital in order to support a fairer and more sustainable future?" These sessions, which were delivered as part of the GSP's climate education programme, gave students the opportunity to share their ideas and inform the development of EdenTree's Fairer Future strategy.

EdenTree colleagues worked alongside GSP educators to facilitate these discussions and translate student priorities into investment themes. Students were then supported in preparing a contribution to the final presentation of the strategy to industry professionals at the Barbican, sharing their perspectives directly on stage alongside the investment team.

One of the most valuable aspects of this collaboration was the opportunity it gave both the students and our colleagues to work together to ensure the strategy's end goals were rooted in real-world outcomes. Across the workshops, consistent themes emerged – such as the importance of healthcare, tackling homelessness and accelerating the transition to renewable energy – which helped anchor the Fairer Future strategy in priorities identified by the next generation. More broadly, the experience showed how collaboration between asset managers and education-focused organisations can create meaningful engagement opportunities.

This type of collaboration requires flexibility and partnership. Balancing the practical constraints of a live investment tender with the time and support needed to involve students was a learning curve, but it demonstrated how incorporating younger generations can lead to more grounded and thoughtful outcomes. It's shaped our approach to partnership going forward and has reinforced the value of creating space for future generations to contribute to investment decision-making.

India Hammond
Marketing and Investment Writer

Green Schools Project and the Endowments Investing Challenge

Being involved in the Endowments Investing Challenge was one of those projects that reminded me why responsible investment is so interesting — and also why it is rarely as neat and tidy in practice as it can sound in theory.

It gave us the opportunity to create something from scratch and we had a brilliant place to start by listening directly to young people through our partnership with Green Schools Project, which forms part of our wider Corporate Responsibility programme. Hearing from students about the issues they care about, and where they would like to see more investment directed, made the whole exercise feel much more tangible. It is very easy in investment to talk in frameworks, themes and processes. It is harder, but far more important, to keep at the forefront that behind those frameworks are real people, real communities and a generation who will live with the consequences of decisions being made now.

It was then our responsibility to help translate those priorities into an investable strategy, while still applying the usual investment discipline around quality, valuation, diversification, risk and return. The proposed Fairer Future strategy asked us to think carefully about themes such as social inclusion, affordable housing, health, education, financial resilience and climate resilience. I was genuinely impressed by how passionate today's young people are about their future, and by the care they showed for their fellow humans and the planet. They gave us some excellent material to work with — albeit we were not quite able to fully address one particularly vocal student's passion for potholes.

We also wanted to convey a very honest message on impact, particularly socially focused impact. In public markets, impact is not always instant, perfectly measurable or easy to package. There are judgement calls, imperfect data and outcomes that take time to develop. That honesty matters. It is also why the partnership with Big Issue felt so valuable: they brought credibility, challenge and real-world expertise, including through impact reporting, and it was brilliant to have Sasha from the group pitching with us on the day.

What I really valued about the Challenge was that it connected Corporate Responsibility to actual business activity, woven throughout the process. The Challenge also prompted reflection on EdenTree itself. During the final Q&A, we were asked about gender representation. I answered honestly: we do have a way to go, and we really do. Asset management has not been the most representative industry, particularly at senior levels, and pretending otherwise would be rather ostrich-like. But personally, it was encouraging to sit on stage alongside an all-female pitch team and be able to speak confidently, and in detail, about the work the organisation is doing, while also being clear that meaningful change takes time. Policies, initiatives and commitments matter, but in my view culture shifts through consistent action: nurturing talent across the organisation, creating visible role models, and recognising our duty to inspire the next generation. Representation is about making sure different experiences are visible in the rooms where decisions are made. In investment, that matters - better decisions come from broader challenge, more rounded debate and, in my humble opinion, fewer echo chambers.

Ultimately, we did not win the Challenge, but what a brilliant demonstration of how much talent and cooperation is around our company. What we can achieve when multiple teams, voices and ideas come together.

Lydia Norman
Associate Fund Manager

Together, these insights reinforce the value of long-term, core funding, independent impact reporting and partnerships that connect community outcomes with EdenTree's wider purpose and business strategy.

This collaboration demonstrates how Corporate Responsibility feeds into EdenTree's core investment thinking, product design and long-term strategy.

Recognition for inclusion and culture

During the reporting period, EdenTree received external recognition for its ongoing commitment to diversity and inclusion.

At the Investment Week Women in Investment Awards 2025, EdenTree was Highly Commended in the firm-level Investment Group of the Year for Diversity and Inclusion category. This builds on broader recognition of the inclusive culture being shaped across the business, and reflects collective effort rather than any single initiative.

In 2026, this momentum continued, with seven women from across EdenTree shortlisted for the Women in Investment Awards. For a business of around 60 colleagues, in an industry where women remain underrepresented, this level of representation is both notable and encouraging. It signals growing visibility of talent across different roles, including those outside traditional investment functions.

At an individual level, our Co-Chair Jay Husbands-Alexander was nominated for D&I Champion of the Year in 2026, following a Highly Commended recognition in the same individual category the previous year. This reflects the increasing recognition of the role that colleague-led initiatives, governance and accountability play in embedding inclusion into day-to-day business practice.

We view these outcomes as indicators of progress rather than endpoints. Awards and nominations provide useful external validation, but they sit alongside the more important, ongoing work of building an inclusive culture through consistent action, listening and accountability.

Contact Us

For further information, call us on

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Monday to Friday 9am to 5pm.
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