



Impact Report 2023

Our B Corp Score

Our 2021 score on the B Impact Assessment is 151.1 – a significant improvement since we first certified in 2015 and one of the highest overall scores for similar sized companies in the UK. Here’s how it breaks down:

Governance

This considers our overall business structure, including who owns and manages EQ. *Learn more on p3*

Community

This considers our impact on the communities where we operate and our suppliers. *Learn more on p7*

Environment

As a services business our environmental footprint may be small, but we take our commitment to net zero emissions seriously. *Learn more on p6*



- 151.1 Our overall B Impact score
- 80 Qualifies for B Corp certification
- 50.9 Median score for ordinary businesses



Customers

Customers

We are proud to have been awarded Best for the World for Customers for the second time in 2022. *Learn more on p4*

Best For The World means our Customers score is in the top 5% of B Corps globally

Workers

This looks at how we treat our employees, from compensation and benefits to training and development. *Learn more on p5*

Introducing EQ

EQ is a wealth management company with a social purpose – to offer sustainable investing for all.

This report explains how we set out to make a positive impact in everything we do. At the heart of this is our commitment to do right by all of our stakeholders, not just our shareholders. We're different from the ground up – set up differently from most limited companies – part owned by a registered charity, and the rest owned by staff. Why? To align our long term commercial interests with those of our clients.

We're proud to be a Certified B Corporation, and to have won a Best for the World for Customers award in 2022. It's not enough to make claims about good practice without evidence. B Corp certification offers external verification, scrutinising every aspect of our business, and we've worked hard to improve our B Impact Assessment score over the past 5 years.

Every successful business delivers great value for its clients, but not every business thinks deeply about the impact of its products and services.

We do. To learn how we've pioneered sustainable investing for our customers, see p4.

We're a staff owned business. We know that our staff are our most valuable asset, so we look to hire great people and create a working environment that brings out the best in everyone. See p5 to learn about our people and culture.

We are on the road to net zero in relation to our own operations. Find out more on p6.

Making a positive contribution to the wider community is a core part of our business philosophy. You can read more about our sister charity, the EQ Foundation, and other community initiatives on p7.

We're not stopping here. We are due to recertify in 2024, providing new evidence to show the improvements we have made over the last three years.

“Our mission at EQ Investors is to connect capital to responsible businesses by offering sustainable investing to everyone.”

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Certified



Corporation

Customers

Our experience in sustainable investing goes back a decade: we are passionate about impact and we believe that it can deliver the best financial outcomes for our clients.

Best for the World for Customers 2022

We were delighted to be awarded Best For the World for Customers in 2022, in recognition of our continued efforts to put sustainable investing at the heart of everything we do.



A market-leading investment process with minimum sustainability standards

We are a signatory to the UN Principles of Responsible Investment, and maintain five core exclusions across all our portfolios (adult entertainment, armaments, gambling, tobacco, and thermal coal). In addition, we expect deep ESG integration and active ownership from all our fund managers, as well as integration of climate risks and opportunities.



Signatory of:



Sustainable strategies for all

We are proud to serve a wide range of clients, with naturally different needs and priorities. Our range of sustainable investment strategies reflects this, offering a sustainable solution for everyone:



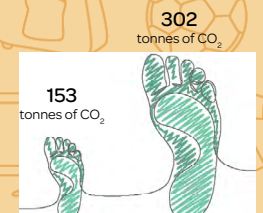
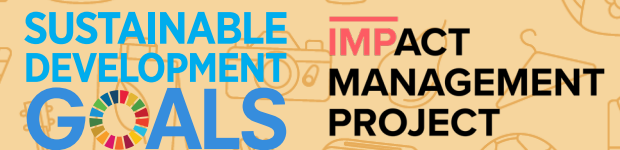
To learn more about our solutions, please visit eqinvestors.co.uk or speak to your financial adviser.



Award-winning impact reporting

We understand how important it is to evidence our impact, and continue to develop tools and reports to share this information with our clients:

- Our annual impact report for EQ Positive Impact includes an online impact calculator tool for client portfolios.
- Our factsheets map portfolio holdings to the UN Sustainable Development Goals.
- Clients can use our online carbon calculator to measure the intensity of their EQ portfolio.



Workers

We're proud to be a staff-owned business, and we do everything we can to invest in our people and build a great working culture at EQ.

Career development

Working to the highest professional standards is core to our business, and we actively support employees to become qualified in their chosen careers through funding exams, allocating study leave and paying membership fees for different professional bodies (e.g CFA, CII, CISI, LIBF).

57% of our Financial Planning staff have achieved Chartered status (CII or CISI), with others on track to achieve this in next 2-3 years. 73% of our investment team have obtained CFA Charterholder or CISI equivalent.

Staff incentives

All staff are given the chance to become shareholders after one year in the business. 60% of staff are currently shareholders and receive regular dividends.

In addition to being an accredited Living Wage Employer, all our staff are also eligible for our bonus scheme, and this year we've enhanced our parental leave policy to support all our working parents.

After two years of remote working during the pandemic, we've evolved a hybrid working model which we see as crucial to our success and continued growth.

Access to employment

We partner with the Resurgo Spear programme, a charity that helps unemployed young people facing barriers to employment. Resurgo provides careers advice, interview prep and coaching & mentoring to candidates as well as working with external firms on internship and full time opportunities that 'Spear Graduates' can proceed into.

RESURGO
SPEAR 
inspiring employment

Spear graduates currently at EQ	7
Average number of years in the business..	4.5
% of total staff	10%

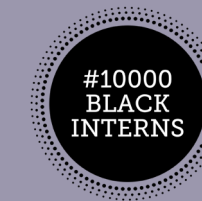
We are proud to support

Women in Finance Charter



We achieved our target of 35% women in senior leadership roles by April 2022. We are now looking to increase this to 40%, to be achieved by 2026.

10,000 Black Interns Programme



We are founding members of this initiative and supported our second internship during the summer of 2022.

"I found out about 10K BI through my sister and was really happy that such an important initiative existed. I applied for roles within finance, and I was really happy that 10K BI had matched me with EQ Investors, an impact investing firm, as I had specified that I wanted something within ESG/Sustainability within my application." – Rachel Solani



Environment

RACE TO ZERO

EQ has been a carbon neutral business since 2020, when we measured and offset our carbon footprint for the first time.

Pledge, plan, proceed, publish

EQ is a member of the B Corp Climate Collective, committing to net-zero emissions by 2030 – 20 years ahead of the targets set in the Paris Agreement.

2021 was our second year of measuring EQ's operational carbon footprint. This included:

- Purchased electricity and gas (33 tonnes)
- Purchased goods and services (233 tonnes)
- Business travel (2 tonnes).

We are committed to reducing these as far as possible, and offsetting any remaining emissions via schemes that remove carbon from the atmosphere when that is possible.



Our investment footprint

As investment managers we have an obligation to manage climate risks across all our portfolios.

Most portfolios are already managed with an explicit aim to demonstrate lower financed emissions versus benchmarks, and we are already engaging with investments on net-zero plans.

This year we launched an online carbon calculator tool that our investors can use to measure the emissions associated with their EQ investment portfolio.

Our medium term goal is to integrate net-zero investment targets into our portfolio management, fund research, monitoring and engagement processes where appropriate. We are currently working on a climate strategy and targets by applying emerging best practices.



NET ZERO | 2030



Carbon neutral since 2020

EQ Investors is proud to be a carbon neutral business. We offset our 2021 carbon footprint – 268 tonnes of CO₂ – through a partnership with Respira. Through verified carbon credits (by VCS), we supported a reforestation project in Ghana, helping expand back to the previously healthy forest cover that has been degraded through overexploitation and agricultural land-use.

Going beyond offsets

Offsets are never going to be enough to avert the climate crisis, and are no substitute for emission reductions. As a consequence, we made additional voluntary donations in 2022 to two charities, Carbon180 and ClientEarth, who are working to deliver systemic changes through environmental litigation and policy advocacy.



Community

At EQ we recognise our broader obligations to people who have been less fortunate than us and take an active interest in our community. Our unique company structure supports this and makes us a truly different kind of wealth manager.

Designed to give

EQ Investors is 20% owned by our sister charity, The EQ Foundation. Being part owned by a charity means that a proportion of our profits will always go towards supporting good causes.



The EQ Foundation is transforming giving in the UK by making grants to impact focused charities and by creating new services for the charitable sector such as Giving is Great. Visit eqfoundation.org.uk to learn more.



The EQ Foundation has also started an environmental charity subscription model based on this research. Visit tythe.org to learn more.



Matched giving

We know how hard it can be to raise funds for your favourite cause, so we offer a matched giving scheme for clients and staff. Doubling charitable donations raised through individual fundraising efforts, gives supporters an extra incentive to donate.

Volunteering

All EQ staff are encouraged to donate up to two days per year to volunteering initiatives as part of their jobs, and we organise a programme of events so that staff can participate as a team.

This December we will be supporting the Whitechapel Mission once again as they help homeless people in London over the Christmas period.

Sustainable supply chain

In 2021 we introduced a Supplier Code of Conduct, in order to understand our suppliers better and ultimately ensure that they share our values.

Where possible, we naturally prefer to work with other Certified B Corps:





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