



Case study: Global asset management firm implements UN PRI

Cases - 30/11/2023

We advised a global asset management firm that manages private credit, private equity and hedges funds.

| Client challenge

The client was new to UN Principles for Responsible Investment (**PRI**) and wished to understand what is required to become a signatory and what steps towards responsible investment integration would need to be implemented to achieve PRI status.

| How we helped

Our team worked with the client to educate it on UN PRI and its requirements. We on-boarded the client and submitted a PRI application. We also set out a roadmap of activities to complete during the client's grace period. We conducted a gap analysis against PRI's 12 modules to understand current status and gaps against the minimum requirements, and reporting framework modules. This included senior leadership statement, organisational overview, policy, governance and strategy, manager selection, appointment and monitoring and relevant asset class modules.

This is an on-going engagement, supporting the client with complete implementation and annual PRI submission services.

| Result

The client has successfully applied to UNPRI, established its governance, policy and strategic approach towards responsible investment and set out a roadmap towards complete implementation of the UN PRI's 12 modules. Developing the overall approach towards responsible investment has also facilitated the client with LP due diligence queries on

sustainability at both the entity and product-level.

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