

## CORPORATE SOCIAL RESPONSIBILITY – ADDENDUM TO GROUP POLICY

### Policy Addendum

Evenlode Investment Management Limited is part of the Oak Investment Partnership. This addendum highlights additional CSR policies that are relevant to Evenlode in addition to those set out in the Group policy. These will be reviewed annually by the Oak Investment Partnership Limited board.

### Business Ethics

Key to Evenlode's investment philosophy is the policy of aligning our interests with those of our clients – we invest our savings alongside investors so they can have the utmost confidence that we have their best interests at heart. Our focus is on building long-term relationships with and delivering excellent outcomes to our clients, rather than selling products.

We are transparent with our investors on what investments we select, offering a well-researched portfolio of investments, updating them on their investments through meetings, seminars and literature.

To further emphasise the importance of responsible investment, we hired a Stewardship Analyst in 2017 who's responsible for providing ongoing analysis of companies from a stewardship perspective and managing Evenlode's voting and engagement activity. The role involves communicating the Evenlode stewardship message to company management to initiate a more positive environmental and social impact in their practices.

### Community

In addition to the Community policies within the Oak Investment Partnership policy, Evenlode has donated to a number of charities including:

- Cirencester Cricket Club
- SpecialEffect
- The Lung Foundation
- Charlbury Town Youth FC
- Cropredy Cricket Club
- Friends of Middle Barton School
- Population Matters
- Hook Norton School
- CASCAID
- Homeless Oxfordshire



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Evenlode Investment Management Limited is authorised and regulated by the Financial Conduct Authority.

Registered Office: The Long Barn, Chalford Park Barns, Oxford Road, Chipping Norton, Oxfordshire, OX7 5QR.  
Registered in England 10378518  
Directors: Ben Peters, Amanda Sullivan, Hugh Yarrow

- Pad Project
- The Calm Zone
- Samaritans
- Friends of Mettapyum

Through our charitable efforts, we are also working towards making a positive contribution towards the United Nations Sustainability Development Goals (UNSDG). We have an aspiration to allocate up to 5% of profit after tax per year towards these goals.

## Environment

In addition to the Environmental policies within the Oak Investment Partnership policy, Evenlode supports “home working” as a method of minimising their environmental impact. We also encourage car-sharing and have introduced an ultra-low emissions car salary sacrifice scheme.

In 2019, we also began to offset the total amount of carbon emitted by our employees. The average tons of carbon emitted yearly is approximately 10 tons however, we have chosen to offset 20 tons of carbon emitted per person per year. This has allowed us to provide the funding for Carbon Footprint Ltd to plant 280 trees per person per year helping us to reduce and minimise our overall contribution to carbon emissions as a business, on behalf of our employees.

For any further queries on Evenlode’s CSR policy, please contact Sawan Kumar.



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