

2024

SDR Technical Support

Are you SDR Ready?

The naming and marketing rules come into force on 2 Dec '24 - with temporary flexibility until 2 Apr '25 where funds meet the FCA's exceptional circumstances.

Navigate the Sustainability Disclosure Requirements - with Confidence

The Good Economy (TGE) offers a comprehensive SDR Technical Support service designed to help fund managers navigate the complexities of the Financial Conduct Authority's (FCA) Sustainability Disclosure Requirements (SDR).

The Good Economy: Your SDR Partner

Our support includes:

- **SDR Assessment:** A thorough five-step process encompassing discovery, alignment, gap analysis, advisory, and support, ensuring you meet all SDR obligations.
- **Specialist Expertise:** In-depth guidance on meeting SDR criteria, for example measuring investor contribution, developing your Theory of Change, and defining robust impact measurement and asset selection methods.
- **SDR Label Application Support:** Maximising your chances of securing the appropriate sustainability label for your fund from the FCA.

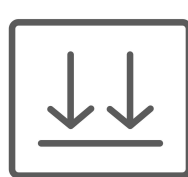
Five Steps to Compliance

TGE has developed a practical five-step approach:



DISCOVERY

Understanding the fund's strategy



ALIGNMENT

Agreeing the most appropriate SDR label



GAP ANALYSIS

Identifying criteria for FCA approval



ADVISORY

Providing inputs for the fund's prospectus



APPLICATION SUPPORT

Assisting with the FCA application process

- **Gain a competitive edge** in the evolving landscape of sustainable finance
- **Ensure SDR compliance** with confidence
- **Enhance investor trust** through clear and transparent sustainability disclosures
- **Access expert guidance** from a team with a proven track record

Key SDR Components We Address:

- **Sustainability Objective:** Crafting a clear, specific, and measurable objective that resonates with investors and avoids greenwashing.
- **Key Performance Indicators (KPIs):** Defining and tracking meaningful metrics to demonstrate your fund's sustainability impact.
- **Investor Contribution:** Articulating how your fund actively contributes to sustainable outcomes.
- **Robust Standards:** Employing evidence-based methods for measuring and reporting your impact.
- **Investment Policy and Strategy:** Aligning your investment approach with your sustainability objectives.
- **Stewardship:** Demonstrating responsible stewardship and meaningful engagement with the companies you invest in.
- **Disclosure Requirements:** Meeting all necessary reporting and transparency obligations.

TGE has a **proven track record** of experience in successfully guiding funds through the SDR application process, including AEW UK Impact Fund's achievement of being the first 'Sustainability Impact' label approved by the FCA.

"We have worked closely with The Good Economy, Eversheds and the FCA to align the Fund with the SDR regime, ensuring that the place-based impact investing strategy we have adopted meets the new stringent criteria."

Ed Long , Portfolio Manager, AEW UK Impact Fund

Why Choose TGE?

- **Deep Expertise:** We possess in-depth knowledge of sustainable investing and impact measurement.
- **Tailored Solutions:** Our services are customised to your fund's specific strategy and goals.
- **Proven Results:** We have a successful track record of helping funds achieve FCA approval.



We offer the expertise and support you need to turn SDR compliance into a strategic advantage. Contact us today to discuss your specific needs.

Contact Us

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