



## Principles for Responsible Investing (PRI) 2023

Magellan Scorecard Summary

### PRI Signatory

Magellan has been a signatory of the PRI since 2012.

Signatory of:



#### What is the PRI?

The PRI is a global initiative that encourages institutional investors to integrate environmental, social, and governance (ESG) factors into their investment decision-making processes. Launched in 2006, signatories of the PRI commit to follow six guiding principles to incorporate ESG factors into their investment and business practices.

- Principle 1** Incorporate ESG issues into investment analysis and decision-making processes.
- Principle 2** Be active owners and incorporate ESG issues into our ownership policies and practices.
- Principle 3** Seek appropriate disclosure on ESG issues by the entities in which we invest.
- Principle 4** Promote acceptance and implementation of the Principles within the investment industry.
- Principle 5** Work together to enhance our effectiveness in implementing the Principles.
- Principle 6** Report on our activities and progress towards implementing the Principles.



**5337 Signatories**



**734 Asset Owners**



**121.3 US\$ Trillion \***

\*As at 30 September 2023 Source: <https://www.unpri.org/>

#### Magellan's Assessment Summary Scorecard

Magellan has been a signatory of the PRI since 2012. Below is a summary of our results for the 2023 Assessment. The full 2023 PRI Assessment report and Transparency Report can be found on our website here: [www.magellangroup.com.au/about/responsible-investing](http://www.magellangroup.com.au/about/responsible-investing)

Module Score and Star Score	
Policy Governance and Strategy	90 ★ ★ ★ ★ ☆
Direct - Listed Equity - Active Fundamental	93 ★ ★ ★ ★ ★
AUM Coverage >50%	93 ★ ★ ★ ★ ★
Confidence Building Measures	89 ★ ★ ★ ★ ☆

Details of this PRI Assessment framework can be found here:

<https://www.unpri.org/reporting-and-assessment/investor-reporting-framework/5373.article>

## Stewardship

Stewardship is integral to our investment process.

### Our Commitment

Since inception, our focus has been on identifying quality companies and achieving investment objectives. A key part of our investment process is to consider material risks and opportunities facing companies and industries including Environmental, Social and Governance (ESG) issues.

Our team diligently engages with companies on ESG risks and opportunities, with the aim of strengthening our conviction in portfolio risk management and improving investment outcomes.

### 2024 Magellan Stewardship Reports

Stewardship is integral to our investment process. Magellan's Proxy and Engagement Review highlights the philosophy and implementation of our stewardship activities and provides details and statistics on our engagement and proxy voting activities.



For our latest Investment Stewardship Reports visit:

[www.magellangroup.com.au/about/responsible-investing](http://www.magellangroup.com.au/about/responsible-investing)

 [info@magellangroup.com.au](mailto:info@magellangroup.com.au)

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