



Value Squared: Guidelines on Engagement with Other Key Stakeholders

Introduction

At Value Squared, we recognize that responsible investment goes beyond simply selecting companies with strong ESG (environmental, social, and governance) performance. Creating a sustainable future requires collaboration with a diverse range of stakeholders who share our commitment to positive environmental and social impact. These guidelines outline our approach to engaging with key stakeholders, fostering open communication, and building strong partnerships for a more sustainable future.

Key Stakeholders

We identify several key stakeholders with whom proactive engagement is crucial for our responsible investment practices:

- **Non-Governmental Organizations (NGOs):** We collaborate with NGOs working on environmental, social, and governance issues. Their expertise and advocacy efforts are valuable for informing our investment decisions and engagement activities with investee companies.
- **Industry Associations:** Participation in industry associations allows us to promote best practices in ESG integration within specific sectors. We advocate for responsible business practices and collaborate on initiatives that drive positive change.
- **Academia and Research Institutions:** Collaborating with research institutions provides access to cutting-edge ESG research and data. This knowledge informs our analysis of companies, identifies emerging ESG risks and opportunities, and helps refine our investment strategies.
- **Policymakers and Regulators:** We engage with policymakers and regulators to advocate for robust ESG frameworks and regulations that encourage companies to adopt sustainable practices.
- **Media:** We maintain open communication with the media to increase public awareness about responsible investment and its positive impact. Additionally, we aim to promote transparency in our investment processes and ESG considerations.

Objectives of Engagement

Our objectives for engaging with stakeholders are:



- **Information Sharing:** We aim to share knowledge and expertise on responsible investment practices with stakeholders and learn from their perspectives.
- **Collaboration:** We collaborate with stakeholders on initiatives that promote positive environmental and social outcomes.
- **Advocacy:** We advocate for policies and regulations that encourage companies to adopt sustainable practices and contribute to a just transition to a low-carbon economy.
- **Transparency and Accountability:** We engage in open communication with stakeholders to ensure transparency in our investment approach and accountability for our actions.

Engagement Strategies

We will utilize various strategies for effective engagement with stakeholders:

- **Regular Meetings and Conferences:** We will participate in regular meetings and conferences with key stakeholder groups to foster dialogue and collaboration.
- **Joint Research and Advocacy Projects:** We will collaborate with stakeholders on research projects and advocacy initiatives related to ESG challenges and opportunities.
- **Membership in Key Organizations:** Membership in relevant industry associations and NGOs allows for participation in their activities and promotes responsible investment practices.
- **Public Statements and Thought Leadership:** We will issue public statements and contribute thought leadership pieces to raise awareness about responsible investment and its impact on key issues.

Communication Principles

Our communication with stakeholders will be guided by the following principles:

- **Transparency:** We will provide clear and accurate information about our investment strategies, ESG considerations, and engagement activities.
- **Respect:** We will engage with stakeholders in a respectful and professional manner, acknowledging the value of diverse perspectives.
- **Timeliness:** We will respond to stakeholder inquiries and concerns in a timely manner.
- **Accountability:** We will be accountable for our actions and transparent about our progress towards achieving our responsible investment goals.

Conclusion

Value Squared is committed to responsible investment practices that create long-term value for our investors while contributing to a sustainable future. By actively engaging with key stakeholders, we can leverage collective knowledge, build strong partnerships, and drive



positive change across the investment landscape. These guidelines provide a framework for effective stakeholder engagement, ensuring transparency and collaboration in creating a more sustainable and equitable world.