

Are you ready for PRI reporting or considering becoming a signatory?

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More than 5,000 investors worldwide are signatories to the UN Principles for Responsible Investment (PRI) and the numbers are growing worldwide.

The PRI are based on six core principles and comprised of 12 modules of mandatory and voluntary indicators. Pension funds make up to 50% of the signatories followed by insurers, sovereign wealth funds, endowments and foundations.

Are you ready for PRI reporting or considering becoming a signatory?

The content of the 2024 Reporting Framework has not changed significantly, but there is a list of items for asset managers and asset owners to consider before submitting their annual report:

- the PRI are centred around six core principles with the annual reporting comprised of 12 modules of mandatory and voluntary indicators
- every new signatory must publicly commit to the principles by a signed declaration from the organisation's CEO (or equivalent) pledging to incorporate environmental, social and corporate governance (ESG) issues into investment analysis, to be an active owner and to seek appropriate disclosure from investee companies on ESG issues and to promote implementation of the PRI's Principles within the investment industry
- becoming a member of the PRI also allows investment managers to publicly demonstrate their commitment to responsible investing

The 2024 reporting cycle

The PRI 2024 reporting window will open on 2nd May 2024 and will run for 12 weeks until 26th July

2024. Reporting is mandatory for signatories that have passed their grace period and did not submit a transparency report during the 2023 reporting cycle, or only completed it privately, and those that reported on a mandatory basis but did not meet the minimum requirements.

How can Ogier's Sustainable Investment Consulting team help?

For new and current signatories, we can assist you on your PRI journey by helping you to:

- understand what information you need to report for each of the 12 modules
- coordinate data and information collection and consolidate within your organisation
- complete your PRI transparency report and help submit it on the PRI reporting portal
- translate policy statements into investment actions
- run independent review and or/verification of data reported for confidence-building
- provide industries best practices insight for on-going improvement in addition to PRI assessment report

For asset owners and investment managers considering becoming a signatory, Ogier can provide pre-sign up services, including:

- engagement with PRI on your behalf
- health check to identify your eligibility and readiness against the PRI minimum requirements
- implementation of the PRI minimum requirements
- internal readiness check against core indicators for PRI assessment
- develop your action plan in grace period and mandatory reporting period

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