

2025 OUTCOMES REPORT

Delivering measurable change for our people, the community and environment.

In 2025, we were focused on building on the momentum from 2024, moving from establishing our approach to deepening it, improving how we measure impact, expanding our reach within the community and setting clear, more ambitious targets for the future.

At the start of 2024, we made a deliberate decision, to move beyond good intentions and begin measuring the real impact of our actions. One year on, this report shows what that commitment has delivered. We have strengthened our connection with the local community, supported charitable initiatives that are making a tangible difference to people's lives and made great strides in our path to carbon reduction. Just as importantly, we have built the internal structures, data, and accountability needed to ensure this progress continues. But what matters most is not what we have done, it is what has changed because of it.

Behind every metric in this report is a real outcome, reduced environmental impact, opportunities created for young people, and meaningful support delivered to those who need it most. These outcomes reflect the collective effort of our people, whose enthusiasm and commitment continue to shape our culture.

Our ambition is simple - to ensure that impact is not a standalone initiative, but an integral part of how we operate, make decisions, and grow as a business.

This report captures our progress to date, whilst setting the direction for where we go next.

ABOUT YEALAND



Authorised and regulated by the Financial Conduct Authority (FCA)

We are a family owned fully independent host Authorised Corporate Director (ACD) and Fund Administrator, established in 2008.

We provide tailored solutions with robust compliance and risk oversight to the funds under our management, supported by our excellent client service. We act decisively, respond with agility and have a demonstrable track record of delivery.

We prioritise long-term partnerships, make decisions with clarity and invest thoughtfully in our people, systems and governance.

Our actions and decisions are guided by our values and our culture is grounded in doing the right thing – every time. This is reflected in how we work with our clients, partners and each other.

£6bn
AUM

79
Funds

64
Headcount

client centric

integrity

together

endeavour

OUR APPROACH

The Yealand Board is responsible for approving the Company strategic goals of which Impact is one, the obtaining of key results under the Impact goal is then overseen by the Executive Committee (Ex-Co), specifically the Impact Champions who are members of the Ex-Co. The Impact Committee hold Yealand accountable for commitments made under the strategic goal 'impact', by supporting the business to take positive action to enhance the employee experience, improve engagement with our local community and protect the environment. The committee has the delegated authority of the Ex-Co for the:

- oversight of the implementation of actions under the Impact strategic goal
- financial control of approved budget assigned to Impact goal and any associated actions
- authority to agree on efforts that have a positive impact on employees, the environment or society as long as they are reasonable and justifiable.

The committee is chaired by Yealand's Chief Administrative Officer who provides progress reports to the Ex-Co monthly and to the Board on a quarterly basis.

This report captures the progress Yealand has made in embedding sustainability into our operations from January to December 2025. The processes, data and achievements described within this report relate to Yealand's Peterborough head office only, no other parent or affiliated companies are covered by the report.



IMPACT PILLARS

Key 2025 Achievements

Environmental Sustainability

We achieved Bronze Investors in the Environment (iE) status and we were shortlisted for iE Newcomer of the Year.



Community Engagement

We deepened our commitment to supporting our local community. Our insights experience for local sixth-formers ran for a 3rd year and we extended our reach to include a second local high school.

Charity Endeavours

Volunteers from Yealand offered their time to gardening at Little Miracles providing families with a safe and inviting outdoor space.

Our staff raised £1,500 for The Break Charity who, through fostering, residential homes, and a Leaving Care service, help children and young people build their confidence, create strong relationships and experience new opportunities.

iE is a national environmental accreditation scheme designed to help organisations reduce their impact on the environment. Their mission is to help organisations make a positive impact on the planet.

We were proud to achieve B Corp™ certification in 2025.

Being part of the B Corp™ global community, means we have demonstrated that we meet high standards of social and environmental impact.

To become certified, we participated in a rigorous verification process which evaluated our practices and outputs across five categories; Community, Customers, Environment, Governance and Workers. We demonstrated our commitment in each of these categories by providing evidence of what we do, how we do it and how we intend to continuously improve.

Being B Corp certified has formalised our existing commitment to bring benefit not just to shareholders, but to consider our other stakeholders too — our clients and our employees, the local community, and the wider environment. It enabled us to step into a framework of continuous improvement.

We recognise that there are a range of views and approaches to environmental and sustainability matters. Our decision to obtain B Corp certification reflects the values and principles by which Yealand choose to operate as a business. However, this accreditation applies solely to our corporate practices and not to any of the collective investment schemes for which we act as ACD. Where relevant, any sustainability characteristics or objectives of a Yealand fund will be clearly set out in the respective scheme documentation, in accordance with FCA requirements.



VOLUNTEERING

Yealand staff volunteer at Little Miracles

Yealand staff carried out over 20 hours of gardening for Little Miracles.

Little Miracles are dedicated to supporting families with children (from birth up to 25) who have additional needs, disabilities, and life-limiting conditions. From humble beginnings as a small drop-in support group, they now support thousands of families across 18 branches located in the East Anglia region.



GIVING BACK

Bhim joined Yealand having graduated with BA (hons) Economics. Bhim is local to Peterborough and attended one of the schools that Yealand has strong links to. When his old school asked for volunteers to support their sixth formers to get career-ready, Bhim didn't hesitate to put his name down. Bhim volunteered his time to conduct mock interviews, providing an excellent opportunity for students to practice interview techniques in a safe and supportive environment. Bhim said:

“I jumped at the chance to give back to the school that contributed to my development. I like that Yealand gives staff the opportunity to do more than their day job and the experience inspired me to join Yealand's Impact Committee”.



EMPLOYEE ENGAGEMENT

Our staff continue to report high levels of psychological safety.

2025 engagement survey results

“I am confident that managers behave ethically” 100% agreed

“I know where to get guidance to help me do the right thing” 98% agreed

“It is safe to speak up and challenge how things are done” 94% agreed



CASE STUDY



Office Relocation

In July 2025, Yealand Fund Services moved from a city centre location to a business park on the outskirts of Peterborough.

Considerations

Prior to choosing a new location, we gathered feedback from our staff and found that there was an almost equal split between staff who would prefer us to remain in our city centre location and those who would benefit if we relocated to the edge of the city.

After a detailed search, we were presented with the opportunity to design our own space in a business park surrounded by green space.

Thinking of the Environment

We were mindful that a relocation from the city centre could be problematic for those who walked or used public transport. Our new location offered:

- Linked access to the Peterborough Green Wheel Cycle network
- Good public transport links
- Ample EV charging stations

Encouraging Good Environmental Stewardship

We took steps to encourage our staff to think about the environmental impact of their commute, by:

- Better publicising our established EV leasing scheme
- Raising awareness of public car sharing sites
- Accommodating changes to working hours to align with bus timetables
- Improving our ride to work scheme offering, to include electric bikes

Reuse, Recycle, Repurpose

Whilst it would have been lovely to buy brand new items for our new office, we made the decision to make do with what we had. Since we were involved in the design of our new office, we were able to design the office aesthetic with our existing furniture in mind. Where furniture was needed, we purchased pre-loved items from a local Company and we even managed to procure free items along the way.

Having spent many years in our city centre office, we had accumulated a lot of things that were no longer required. Rather than sending those items to landfill, we took steps to sell or donate them. Our HR officer, Sarah, created a catalogue of the surplus items and offered them to staff in return for a donation to our chosen charity. Items that were not taken by staff were given to remaining tenants or to local charities. Left over items were responsibly recycled by reputable organisations.

We have benefitted from a fabulous new office space, others have given a new life to items no longer required and charities benefitted too. A great result!

2025 IN NUMBERS



100% waste diverted from landfill (since Jul '25)

54.7% waste being recycled (since Jul '25)

70% staff classed as hybrid workers

26% reduction in printing (H1 v H2)

x2 participation in our EV lease scheme doubled

+2 Ride to Work scheme participation increased from 0 to 2 users

34 in-work-time volunteering hours given by staff to good causes

91 less printed pages per month

50:50 ratio of female to male board members

We set out to build momentum in 2025 and we've done just that. We achieved more than is set out in this Outcomes Reports. We extended our recycling reach by encouraging the 70% of our staff who regularly work from home to adopt good environmental stewardship. We did more for local schools, nurturing future local talent through our involvement in career-ready initiatives, including the employment of 3 Graduates who had completed their secondary education in Peterborough-based schools. We strengthened employee involvement by holding workshops for staff to gather ideas, which we are taking into 2026.

In 2026, we will

- introduce sponsorship/donation matching for staff-led charity endeavours
- broaden our relationships with local schools, including primary educators
- collaborate with iiE to understand and set targets for carbon reduction in our new office, because data collection is critical to creating meaningful progress
- fully utilise the B Corp community, of which we are a proud member, to continuously enhance our stakeholder approach
- facilitate further office-hours volunteering

And we will always listen and encourage everyone at Yealand to contribute to the success of our Impact goal. We are fortunate to have a team who are deeply involved and committed to our Impact goal – our high levels of staff engagement will drive our results. Behavioural change takes time and consistent reinforcement, and so we will continue to refine our approach. Our intention will remain to be accountable to all stakeholders including shareholders, our employees, our community and the environment, and to consider the long term environmental, social and human impact of our business decisions.

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