

FACTSHEET 2024

SDR Assessment

The Good Economy's **Sustainability Disclosure Requirements Assessment Service** helps funds navigate the new regime, providing a practical five step process to strengthen alignment with the rules.

Independent opinion
on alignment w /
labelling and
disclosure
requirements

Reassurance that
you are using the
right label

Confidence that
funds are correctly
following the
qualifying criteria

Access to industry
best practice and
peer examples

Are You SDR Ready?

Five Steps to Compliance

The UK sustainability disclosure and labelling requirements contain many aspects that asset managers may not be familiar with - from the use of independently assessed sustainability thresholds to the requirement for 'Sustainability Impact' products to measure and report on investor contribution.

1. Discovery

Initial meeting to discuss the firm's labelling options and implications for naming, marketing and disclosures. Share relevant firm- and fund-level documents.

2. Gap Analysis

Using TGE's assessment framework, we review each in-scope fund against the relevant SDR qualifying criteria related to their sustainability objective, investment policy and strategy, KPIs, resources and governance and stewardship.

3. Findings & Recommendations

Debrief meeting to discuss results of the assessment and formulate a set of prioritised, actionable recommendations.

4. Market Intelligence

Sharing of peer examples and industry best practices to help firms address identified gaps and implement the recommendations.

5. Next Steps

Meeting to formulate a roadmap for alignment (if required).

Contact Us

4 Miles's Building, Bath BA1 2QS
Moor Place, 1 Fore St Ave, London EC2Y 9DT

+44 (0) 1225 331 382
info@thegoodeconomy.co.uk