



# Stewardship at a Glance

Here's a snapshot of what's included in our latest Annual Stewardship Report. You'll find details of our Thoughtful Investment approach, Sustainability Metrics for our Thoughtful Fund range, Engagement Case Studies and Voting Activity.

## COLLABORATIVE ACTION



We signed a joint investor statement on Antimicrobial Resistance (AMR) coinciding with a UN High-Level Meeting on AMR - find out more [here](#).

## WORKFORCE ENGAGEMENT



We engaged with companies on issues including:

- Executive pay
- Modern slavery
- Mental health
- Net zero & climate risks

## SUPPORTING CLIENT VULNERABILITY

Joined Financial Vulnerability Taskforce Charter recognising the additional risks clients in vulnerable circumstances face and taking active steps to address them

## THE THOUGHTFUL INVESTOR<sup>®</sup>

Learn more about our Thoughtful Investor Approach B.E.S.T. framework and the Sustainability Metrics used to monitor our Thoughtful Fund Range - click [here](#).



## ACTIVE VOTING

1,734

We actively voted to represent the views of our clients, with 1,736 resolutions voted on at 124 meetings. Learn more [here](#).

## CISI CHARTERED FIRM<sup>™</sup>



Castlefield achieved CISI Chartered Firm<sup>™</sup> status in demonstrating highest levels of professionalism, ethics, and commitment to excellence

## ENGAGEMENT CASE STUDIES FROM:

- [The Gym Group](#)
- [Unilever](#)
- [Schneider Electric](#)
- [Unicredit](#)
- [Britvic](#)



## ABOUT CASTLEFIELD



We're an award-winning, ethical investment and advice group that's part-owned by a grant-making charitable foundation. Learn more about us [here](#).

## BEST ESG ADVISER



Winner of 'Best Adviser firm for ESG' and named as one of the 'Best Financial Advisers to Work For' (Professional Adviser Awards)

## EMPLOYEE OWNED



Castlefield is proudly employee-owned. We're also a Disability Confident, Living Wage and Age-Friendly employer.

[Learn more and read the full report here](#)

