



EDMOND
DE ROTHSCHILD

Case Study

Edmond De Rothschild

**EVORA Global provide
Edmond De Rothschild with
the tools to understand SFDR.**



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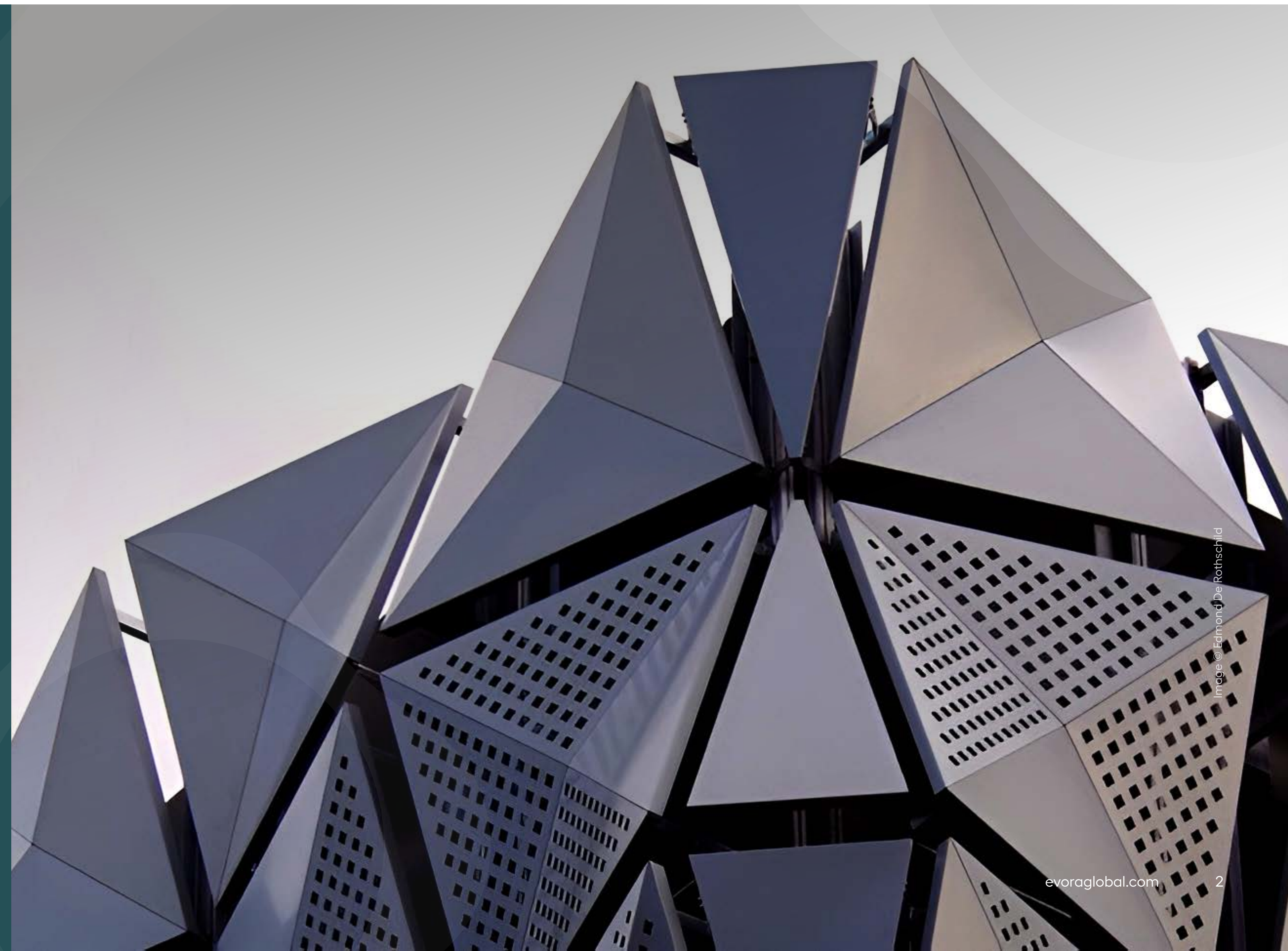
The Challenge

EVORA Global have been working with Edmond de Rothschild REIM UK since 2018 (previously Cording) and had the pleasure of:

- Developing an ISO 1400 accredited environmental management system
- Improving ESG data management
- Guiding through GRESB assessments
- Producing fund level ESG Reports
- Dealing with investor requests
- Providing ESG training.

Edmond de Rothschild REIM operate a residential built to rent fund with assets across the UK.

Their latest residential fund is marketed across Europe. As such, compliance with Sustainable Financial Disclosure Regulations (“SFDR”) is necessary. The team wanted advice on how to position their fund to remain competitive and attractive for investors.



Our Approach

EVORA Global delivered a SFDR workshop – to enable the fund team to best understand the legislation, challenges, opportunities and requirements for future reporting. This was supplemented by lots of practical examples and insight on how peers were tackling the regulations.

We developed a necessary SFDR toolkit, including draft completion of annex, creation of fund action plan containing advised environmental and social characteristics and indicators, support on PAIs and draft website disclosures. A roadmap was produced collaboratively with the fund team to enable a full understanding about how to implement the fund ESG action plan and achieve characteristics, and how to deliver necessary future disclosures.

EVORA Global provided ESG representation in communications with Edmond de Rothschild REIM's legal team to ensure suitability and compliance.

Key Outcomes

Such a service provided the Edmond de Rothschild REIM team with confidence that they could deliver an **Article 8*** product successfully and ultimately attract those ESG-minded investors.

*Article 8 alignment

“A Fund which promotes, among other characteristics, environmental or social characteristics, or a combination of those characteristics, provided that the companies in which the investments are made follow good governance practices.”



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