



BANGOR

Bangor University aims to be an inspirational place to live, work and study, promoting the well-being of current and future generations, justice, integrity and sustainable growth in society. We are committed to ensuring that our funds are invested responsibly. This policy ensures that the University optimises its investment returns without compromising our commitment to sustainability and well-being of current and future generations.

Our objectives are:

- To maximise total return on investments (capital and income); contain risk to an acceptable level and maintain a portfolio of diversified investment reflecting the need to fund future developments
- To maintain the value of our funds, after taking account of inflation (as a minimum) over the long-term
- To provide an income stream to the University and to the endowment funds

Our approach

We understand that our investment activities are of interest to our students and other stakeholders. In making investment decisions Bangor University is committed to do so responsibly and sustainably, recognising our environmental, social, cultural and governance responsibilities. We will not make decisions on which individual investments to hold but will work with an investment manager to make those decisions based on environmental, social and corporate governance (ESG) principles set out by the University through this policy and a list of business activities in which we will not invest.

The ESG principles that we expect to be applied to our investments are that all potential entities that could be included in our portfolio should demonstrate a high commitment to:

- Their impact on the environment, including clear policies around climate change, pollution, water, and waste management.
- Their commitment to promoting a positive impact on their own staff and their customers through their people policies and promoting diversity.
- Responsible business conduct, including governance, accountability to shareholders and other stakeholders in ensuring that their operations do not harm human rights or breach laws and regulations, including international law.

CCLA has been appointed as our investment manager and are able to align these principles to their own methods of assessing the ESG qualities of potential investments.

We expect our manager to apply a combination of negative screens to ensure that companies whose business activities may be harmful to society or the environment are excluded from the investment portfolio. Bangor University will not invest (either directly or via securities issued by companies) in businesses which generate significant revenue from:

- Weapons/armaments
- Alcohol
- Gambling
- Tobacco
- Adult Entertainment
- Fossil fuel extraction, refining, and production
- High interest-rate loans

Student and Staff Engagement with the Sustainable Investment Policy (SIP): Bangor University is committed to including student representation on its [Finance Committee](#) and Investment Committee, both include a Sabbatical Officer of the Students' Union. The Finance Committee reports to the University Council which also include a staff-nominated member along with the Student's Union President. The University ensures that there are opportunities for engagement with the SIP by raising awareness and concerns about ethical investments with students and staff through communications in the Student and Staff Bulletins and feedback is progressed to the Investment Committee. The Investment Committee will then consider requests from the University community to make changes to our policy.

This will be reviewed annually by the Investment Committee, endorsed by Finance Committee, and reported to the University Council. It is also communicated to the wider University population and is publicly available on the University's website.

The University will publish annually on its website a list of companies and other funds in which investments are held.

Approved by: The Investment Committee

Signed by: The Chair of the Investment Committee

(Emily Rees)

Sustainable Investment Policy Date of issue: 1st August 2026 Valid until: 31st July 2027

Policy Originally Created: 1 August 2018 | Last Review Date: 1 August 2026 | Next Review Date: 31 July 2027