

Ethical Investment Policy

2025 - 2027



Edge Hill
University

Ethical Investment Policy

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Summary

This policy outlines Edge Hill University's approach to ethical investment, including governance around ensuring that investments are ethical and in line with relevant sustainability policies.

Policy Statement

The purpose of this policy is to outline the University's position in relation to the management of its investments in an ethical manner.

This policy is embedded in the University's financial practices and is designed to support the delivery of the University's environmental, sustainability and corporate responsibilities through an ethical approach to investments.

This policy applies to the full scope of the University's investments; this excludes pension funds as we do not have control over the investment strategies of these funds.

Edge Hill University routinely invests funds with third party organisations in accordance with Treasury Policy through the regular investment of surplus funds.

Wherever possible, the University wishes to make such investments in ways that are consistent with the mission and aims of the University as expressed in the Strategic Plan.

This policy is based on the premise that the University's choice of where to invest should reflect the ethical values it espouses in public, therefore it is expected that wherever possible, investments are consistent with our sustainability goals as outlined in the Sustainability Strategy.

The University strives to not knowingly invest (including through collective funds), in organisations whose activities and practices directly pose a risk of serious harm to individuals, groups or the environment, or whose activities are inconsistent with the mission and values of the University. This includes:

- Fossil fuel companies.
- Arms companies.
- Border industry companies.
- Companies in violation of international law.

Short term deposit funds are held with banks and building societies operating in the London market and licensed by the Financial Services Authority.

The University commits to prioritising holding cash deposits with banks that have committed to not fund fossil fuel expansion.

To ensure that this policy remains effective it will be reviewed and reported on at the Finance Committee meetings where members will:

- Review on a regular basis whether any investment is contrary to this policy statement.
- Monitor the operation and effectiveness of this policy on an annual basis.
- Commit to ensuring that wherever relevant and possible, annual reporting on investments is undertaken either as part of the University’s annual Report and Financial Statements which are made available on the website, or in another suitable manner.
- Consider representations from members of its community regarding whether it should invest in, or divest from, specific organisations. Individuals can contribute/engage with this Policy through the stakeholder engagement process undertaken during policy reviews, this includes consideration by the Institutional Sustainability Committee which gathers staff and student input via committee membership.

Key to Relevant Documents

Sustainability Delivery Plan

Sustainability Delivery Plan Objectives document

Sustainability Strategy


University Strategic Plan

University Financial Regulations

Document Control

Version	Date	Change Author	Summary of Changes
1.0	June 2025	Corporate Sustainability Manager	Creation of new document.
1.1	May 2026	Head of Sustainability	Updated to reflect new document names. Added in clarification around student and staff representation, and cash deposits process.

Endmatter

Title	Ethical Investment Policy
Policy Owner	Director of Finance
Approved by	Lynn Hill, Chief Operating Officer
Approving committee	Finance Committee
Approvers signature	
Date of Approval	June 2026
Date for Review	June 2027