SitusAMC

Corporate Sustainability Report

2024

Contents

Letter from the CEO

Reflecting on the remarkable progress we have made over the past few years, I am honored to present our third annual corporate sustainability report.

The dynamic and often challenging landscape in which we operate serves as a constant reminder of the resilience and adaptability required in today's world. Global political changes, the rapid acceleration of AI integration across industries, and the demand for stronger governance highlights the critical importance of our commitment to sustainability.

Our team remains unwavering in our commitment to a sustainable future, and [2-22]I am pleased to provide a 2024 update on the commitments we made in our 2023 report, including:

- Minimizing our environmental impact while upholding business integrity.
- Promoting the professional and personal growth of our employees.
- Enhancing the social and economic well-being of the communities we serve.

We take pride in having retained a silver rating from EcoVadis in our third year of certification, placing us in the top 15% of companies rated. Additionally, I am proud to announce that our India offices received a Great Places to Work certification in our inaugural year of participating, a testament to our commitment to cultivating a positive company culture based on employee feedback.

We remain deeply committed to giving back to the communities we serve. Through strategic regional partnerships, we have engaged in initiatives and community projects to empower local populations and foster sustainable development. Our investment in community programs creates a positive feedback loop that benefits our business and the environment.

Our ongoing participation in the United Nations Global Compact (UNGC) and its Sustainable Development Goals reflects our ongoing dedication to aligning our operations with universal principles encompassing human rights, labor, the environment, and anti-corruption. We believe that by adhering to these principles and supporting the Sustainable Development Goals, we not only contribute to a more sustainable world but also enhance our corporate integrity and stakeholder trust.

As we look ahead, I am optimistic about the path we are forging together. It is through our collective efforts that we can navigate the complexities of today's world while remaining true to our values of sustainability and corporate responsibility.

Thank you for your continued support as we endeavor to make a meaningful impact. Together, we can build a more sustainable future for generations to come.

Michael Franco
Chief Executive Officer

Welcome – Statement from Corporate Sustainability Head

Welcome to SitusAMC's 2024 Corporate Sustainability Report.

As we enter our third year of sustainability reporting, our dedication to supporting the Sustainable Development Goals (SDGs) remains strong. Amongst some of the goal progress, I want to highlight the efforts in:

- SDG 12 - Responsible Consumption and Production, supported by the launch of our Going Green initiative focused on enhancing communication, education and training for our employees in environmental sustainability, both at home and at our workplace.
- SDG 8 – Decent Work and Economic Growth, supported by the launch of the Rising Professional Employee Resource Group and a more unified and structured global Health and Safety program for our employee wellbeing.

In an era marked by change – whether in climate, politics or technology-we remain committed to ensuring our economic sustainability and ethical responsibility towards our employees, our environment and the communities we serve. I am pleased to provide an update on our 2024 progress:

Reporting and Governance
Our Internal Audit department began addressing key risk areas within the company, prioritizing the external complains process Ethics and Compliance. We are proud to report our Ethics training completion rate remains 100% in 2024. Our second CDP (formerly known as Carbon Disclosure Project) submission showed improvements in critical areas of dependencies, impacts risks and opportunities, environmental policies and Scope 3 emissions. However further attention is needed in Risk Disclosures to enhance our progress. Overall, our sustainability efforts were recognized by the year-on year increase of our sustainability rating by EcoVadis, placing us firmly in the top 15% of all companies rated by them.

People and Environment
In 2024, we launched the Going Green initiative to support our vision to become a leading climate-conscious company. This initiative has seen great success with recycling programs, community tips and the celebration of our green champions through our inaugural sustainability competition and Green Advocate series, where our employees share stories of going green. We continue to emphasize the importance of utilizing green energy and I am pleased to report our office footprint in green certified buildings has increased to 48%, positioning us well on track to reach our target of 50% by 2030.

We value employee engagement and have launched two additional Employee Resource Groups (ERGs) in 2024: Working Parents and Caregivers, and Rising Professionals.These groups have been well received, promoting career development and management for those navigating the challenges of being a rising professional, working parent, caregiver, or both.

Communities
I discussed our goal of establishing regional partnerships to replicate the success of our efforts in the US. In 2024, after thoughtful consideration we formed partnerships with Vrikshit Foundation in India, connecting us with charitable organizations in our local communities, and Future Youth, a not-for-profit, that provides after-school and holiday programs for future generations.

Challenges
We are committed to enhancing our environmental emissions reporting, a significant challenge we face in non-green certified offices. We acknowledge that this will require time, and we will continue to collaborate with our landlords to obtain accurate and comprehensive data. As shareholder priorities evolve, we recognize the need to update our materiality analysis to align with these changes.

Looking to the Future
As we step into 2025, we are deepening our commitment to sustainability by forging stronger partnerships with landlords to enhance the accuracy and breadth of our Scope 3 emissions reporting. We will continue to elevate our global Health and Safety program, ensuring the well-being of every employee remains a top priority. At the same time, we are expanding volunteering opportunities to empower our people to make a difference in the communities we serve. Finally, we are strengthening our governance framework to remain agile and responsive to the evolving landscape—ensuring our business remains resilient, responsible, and future-ready.

Sehr Aziz
Corporate Sustainability Head

2024 At A Glance

EcoVadis

SILVER | Top 15%
ecovadis
Sustainability Rating
AUG 2024

Great Place To Work

Great Place To Work®
Certified 2024
INDIA

CDP

CDP
Discloser 2024

D
2023

C
2024

Emission Intensity in tCO2e (Per full-time employee)

0.272 (2023)
0.266 (2024)

Office Footprint in Green Certified Buildings (in %)

26 (2021)
34 (2022)
43 (2023)
48 (2024)
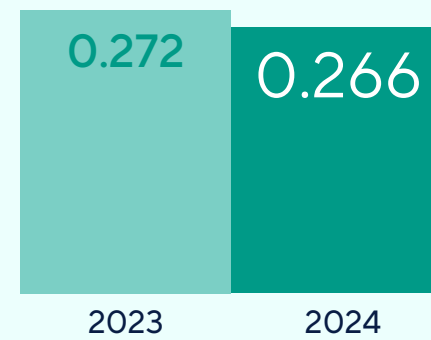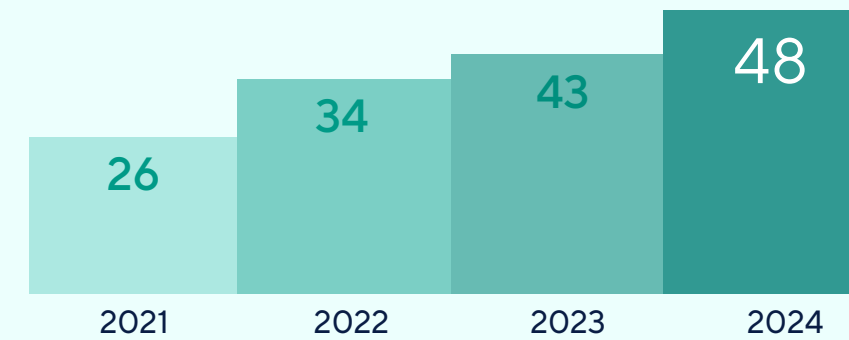
Volunteering (in hours)

1,429 (2023)
2,362 (2024)
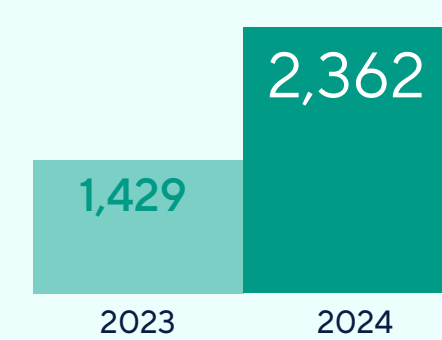
Great Place To Work Positive Statement %

71%
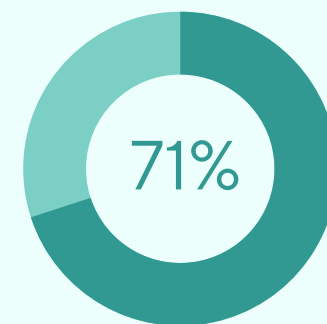
Voice of Employee Survey Participation %
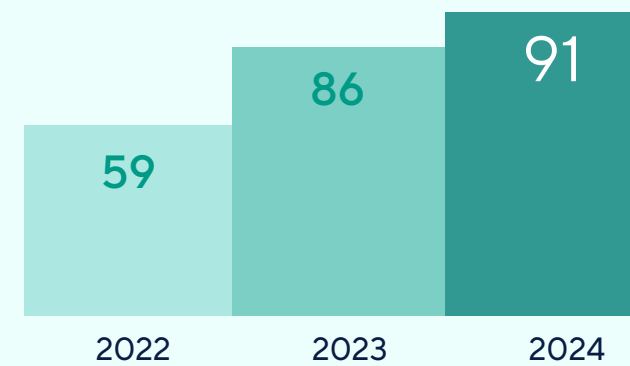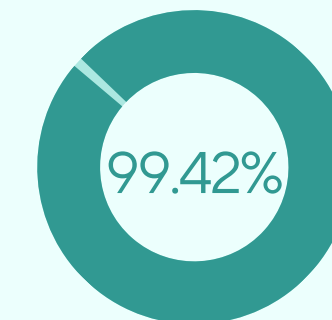
59 (2022)
86 (2023)
91 (2024)

Performance and Career Development Review Completed

99.42%

SitusAMC

Our Business

Who We Are

[2-6] SitusAMC is the leading independent provider of innovative, trusted solutions powering the entire lifecycle of real estate finance. Our offering includes:

- Commercial Real Estate Finance Solutions
- Residential Real Estate Finance Solutions
- Talent Solutions
- Technology Solutions
- Data, Analytics, and Research Solutions

With more than 30 years of delivering results, we are trusted by over 1,500 clients, including banks, private equity firms, asset managers, residential originators, servicers, CMBS/RMBS issuers, and insurance companies.

OUR COMPANY

30+
Years of delivering results

4,000+
Professionals

350+
Technologists

25+
Global offices

1500+
Clients

Our Values

At SitusAMC, our values are the foundation of how we operate and engage with our colleagues, clients, and partners. We believe in the power of authenticity, encouraging everyone to bring their true selves to work. We prioritize the needs of others, advocating for the success of our teams and clients alike. Bold thinking is at the heart of our culture — we embrace big ideas that challenge the norm and drive transformation. In a constantly evolving world, we stay agile and ready to adapt. By thinking globally and acting locally, we harness the strength of our worldwide network to make a meaningful impact in our communities. Above all, we take full ownership of our outcomes, learning from every experience and striving for continuous improvement.

Our corporate values serve as the guiding principles that underpin our responsible business practices. Our values define the way we work – with our colleagues, customers, and suppliers – each and every day. They are:

Be Yourself

We're better because of our differences and the unique perspective each person contributes.

Dream Big

Transformation is not for the timid. We celebrate brave, bold thinking that challenges the status quo.

Think Global. Act Local.

We're at our best when we leverage the strength of our global community to drive positive outcomes for our local spheres of influence.
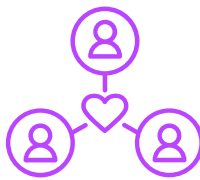
Advocate For Others

Put your colleagues' and clients' needs above your own, fighting for them and championing their success at every turn.

Stay Nimble

Things change. Be open and ready to adapt.

Own Every Outcome

Take ownership of the results, celebrating success, learning from failures, and always looking to improve.

Membership & Associations

[2-28] We understand the importance of contribution and collaboration across our industry. In addition to regulatory requirements, we are a member of or participate in initiatives within our sector, including:

- AARMR (American Association of Residential Mortgage Regulators)
- CMBA (California Originations and Compliance Forum)
- CREFC (Commercial Real Estate Finance Council)
- CREFC Europe (Commercial Real Estate Finance Council Europe)
- LMA (Loan Market Association)
- MBA (Mortgage Bankers Association)
- MISMO (Mortgage Industry Standards Maintenance Organization)
- NCREIF (National Council of Real Estate Investment Fiduciaries)
- SFA (Structured Finance Association)

Notable Awards & Honors

CDP – "C"

Performance score on formerly known as Carbon Disclosure Project

Great Place to Work

EcoVadis

Letter from the CEO

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SitusAMC

Our Sustainability Priorities

Our Sustainability Priorities

In an era marked by change, we continue to focus on key themes within the United Nations Sustainable Development Goals (UN SDGs) framework that align with our overall business strategy. We also understand the value of continued dialogue via assessments of material issues with our stakeholders to ensure the Sustainable Development Goals we are supporting are aligned with their sustainability goals.

SUSTAINABLE DEVELOPMENT GOAL	OUR ACTIVITY	OUR AMBITION	PROGRESS
SDG 7 Affordable and Clean Energy	Transitioning to renewable energy across our corporate estate	50% of our total office footprint to be residing in green certified buildings by 2030	On Track
SDG 8 Decent Work & Economic Growth	Ensuring a healthy and safe working environment that celebrates success, while offering development and learning	Continuing to provide a positive, trusted and rewarding working environments for all	On Track
SDG 10 Reducing Inequalities	Supporting communities	To ensure we generate positive social impact by working with communities in the areas that matter most	On Track
SDG 12. Responsible Consumption & Production	Reducing, reusing, and recycling throughout our business operations	To measure identify and measure our waste and set reduction targets	On Track
SDG 13. Climate Action	Identifying and understanding our environmental impacts, and taking active steps to reduce them across scopes 1, 2 & 3	To define our net zero target and set interim emissions reductions targets as part of our net zero roadmap	In Progress
SDG 16. Peace, Justice and Strong Institutions	Substantially reduce corruption and bribery in all their forms	Maintaining robust policies, procedures, and processes for anti-bribery and corruption throughout our business	On Track

Governance

Governance Structure

"Strong corporate governance at SitusAMC is foundational to our integrity and effectiveness. Robust policies and procedures guide all aspects of our corporate governance, whilst providing us with confidence that our business practices are conducted ethically and transparently.

The SitusAMC Board together with the Executive Leadership Team play a pivotal role in our governance by providing fair and independent oversight, fostering an environment of accountability and trust. This dual governance structure not only safeguards the interests of clients and stakeholders but also enhances the firm's reputation and resilience in a competitive landscape, ultimately driving sustainable growth and excellence in service delivery.

Equally vital to our governance framework are our employees, whose commitment to ethical conduct and operational excellence reinforces our culture of integrity. Through ongoing training, open communication, and a shared sense of responsibility, our people are empowered to uphold the highest standards of professionalism and compliance. Their engagement and integrity are essential to translating our governance principles into everyday actions that support our long-term success."

Lisa Wallace
Executive Managing Director,
General Counsel

Governance Structure

[2-9] [2-10] [2-11][2-12] The Board of SitusAMC Group Holdings GP, LLC (Board) is the highest governance body, responsible for setting the organizations strategic direction.

The Board comprises of the CEO of SitusAMC and senior qualified representatives from each of our majority stakeholders, Stone Point Capital and PSP. Each member is recognized for their competencies, skills, industry knowledge, and leadership attributes necessary for individuals serving on our Board.

We value diverse perspectives and the independence of Board members. This enables dynamic discussions, effective risk management, innovation facilitation, accountability reinforcement, stakeholder confidence enhancement, ethical compliance, strategic foresight, and adaptability to change. By adhering to these principles, our Board is equipped to fulfill its fiduciary responsibilities and support the long-term success and sustainability of our organization.

[2-17] Board members regularly participate in, attend, and host events related to all areas of real estate finance and corporate initiatives, generally. Additionally, each board member has access to relevant information, data, research reports, and industry benchmarks that inform their decision-making process and enable them to stay abreast of market trends, competitive landscapes, and emerging opportunities or risks. The Board also stays informed about evolving regulatory requirements, governance principles, and best practices in corporate governance.

[2-19] The members of our Board employed by Stone Point Capital and PSP are not paid by SitusAMC. They receive compensation from their respective organizations.

Governance & Sustainability

Our Board of Directors supervises the corporate strategy pertaining to sustainability and social responsibility. The board has consciously decided to keep the governance of these issues at the board level, as it considers these matters vital to the company's success.

The Role of the Board and the ELT

The Board is supported by the Executive Leadership Team (ELT) – the highest governance body responsible for the day-to-day operation of SitusAMC. The Board meets quarterly, while the ELT meets monthly. Sustainability and corporate responsibility are regular agenda topics for the Board, including goals related to sustainable development. Beyond the executive team, additional internal and external stakeholders are engaged on topics related to corporate sustainability through activities such as client audits, surveys, resource groups, town hall meetings, and the employee engagement platform.

Governance

SitusAMC has a variety of governance bodies that each focus on different facets of the organization and report back into the ELT. Every committee must include either the CEO or other executive leaders as members. These committees are dedicated to overseeing key governance practices, ensuring that strategic direction aligns with our commitment to business sustainability. [2-19] The Board and CEO oversee compensation processes and determinations at the highest level. Executives receive a base salary plus the annual bonus program that applies companywide. Depending on their offer letter or agreement terms, executives may be eligible for additional bonuses, equity programs, or incentive common unit shares.

[2-20] There is a separate compensation committee comprised of members of the Board. The company works with an external consultant to determine fair remuneration proposals.

Governance Bodies	Total Members	ELT%
SitusAMC Board	3	100
Executive Leadership Team	7	100
Risk and Compliance Committee	7	43
Compensation Committee	6	33.3
Artificial Intelligence (AI) Committee	11	18

Ownership & Accountability

[2-13] [2-14] The Board delegates responsibility to the ELT, via the CEO, to manage the organization's sustainability impacts. The Head of Corporate Sustainability works with different department heads to advance the Sustainability strategy and reports to the Chief Administration Officer (CAO) on the ELT. They provide updates and recommendations that the Board can use to make budget decisions for sustainability initiatives.

The Board reviews the progress of sustainability initiatives via a quarterly Board pack. The success is measured by audit (governance) results and rating agencies (EcoVadis and CDP) for sustainability matters.

The ELT reviews and approves the alignment of the Sustainable Development Goals for the year. The head of Corporate Sustainability reviews the consolidated reported information prior to submission to the Board. The respective Heads of Department review disclosures on HR, Legal, and Compliance information, while the Head of Corporate Sustainability ensures consistent reporting.

[2-18] The evaluation of the Board is closely aligned with the review of the Company's overall annual performance, which is measured via a scorecard. The scorecard includes elements such as Strategic Initiatives, Process Control and Refinement, People, and IT Development.

Our corporate scorecard is finalized annually but reviewed quarterly to ensure we are on target. Third-party auditors and evaluators are also part of our general governance program. Areas for improvement or remediation are identified in subsequent scorecards, and performance is discussed among the ELT and reported to the Board.

SitusAMC

Environment

Environment

SitusAMC is dedicated to being an environmentally responsible organization. We consistently strive to improve our sustainability efforts while being conscious of our stakeholders' expectations.

Our environmental sustainability strategy centers on optimizing resources and implementing effective sustainable solutions for ourselves, and the business partners in our value chain. Key priorities include enhancing energy efficiency, increasing the use of renewable energy and fostering sustainable green building design and operations.

This aligns with the UN SDG Goals: Affordable and Clean Energy; Sustainable cities and communities; Responsible Consumption and Production and Climate Action.

GHG Emission

In 2024, Our primary focus is on enhancing the accuracy and completeness of our emissions data. By strengthening our data collection processes and expanding the scope of our reporting, we aim to generate more robust and transparent insights compared to previous years. These efforts are critical in helping us better understand our indirect emissions and identify targeted opportunities for reduction across our value chain.

Organizational Boundaries
SitusAMC organizational boundaries for emission reporting is defined using the Operational Control Approach.

Source Of GHG Emissions
[305-1] [305-2] [305-3] As a professional services firm without direct ownership of emission-generating assets, SitusAMC's carbon footprint primarily arises from indirect sources, that fall into the Scope 2 and Scope 3 categories.

[305-1] Scope 1	[305-2] Scope 2	[305-3] Scope 3
Combustion and Refrigerant emissions tied to our leased offices and data centers.	Electricity and natural gas consumed by us in leased office spaces, Shared building utilities managed by our landlords.	Business travel, Employee commuting and energy-related activities. Additional Scope 3 emissions are captured in categories such as purchased goods and services, operational waste, and upstream leased assets.

Breakdown of SCOPE 3 Emissions
[305-3] Our Scope 3 emissions play a crucial role in our total carbon footprint, largely resulting from employee commuting, i.e. 68.2% and 17.7% from business travel.

Additional Scope 3 emissions are captured in categories such as purchased goods and services, operational waste, and upstream leased assets.

Category 3.1 - Purchased Goods and Services
GHG emissions associated with our supply chain associated with our cloud data storage.

Category 3.3 - Fuel and energy related activities
Emissions associated with transmission and distribution losses and production, processing and delivery of fuels or energy (well to tank). These emissions are directly corelated to other scope 1 and scope 2.

Category 3.5 - Waste
[306-1] [306-3] Operational waste from SitusAMC leased offices. For major sites, total waste data is used; for others, it's estimated based on average annual waste per office mainly split between recycling and landfill, including paper, cardboard, glass, food, and organics.

Category 3.6 - Business Travel
Flight data (short, medium, long haul) comes from travel partners, while employee-expensed travel emissions are estimated using spend-based proxies. Uses both distance- and spend-based methods.

Category 3.7 - Employee Commuting
Emissions resulting from our employees getting to and from their place of work.

This category makes the most of our total scope 3 emissions majorly accounting from the introduction of the Cab service for our India workforce in 2024. Emissions are calculated using Full Time Employee and commute data, with extrapolations where needed.

Category 3.8 - Upstream Leased Assets
Upstream Leased Assets is comprised of operational emissions associated with SitusAMC's share of common areas in buildings that we are a tenant.

Total Scope 3 breakdown (in %)

Pie chart values: 3.2, 9.9, 17.7, 68.2, .04, .06

CATEGORIES

- Scope 3.1: Purchased goods and services
- Scope 3.3: Fuel & energy related activities
- Scope 3.5: Waste generated in operations
- Scope 3.6: Business Travel
- Scope 3.7: Employee commuting
- Scope 3.8: Upstream leased assets
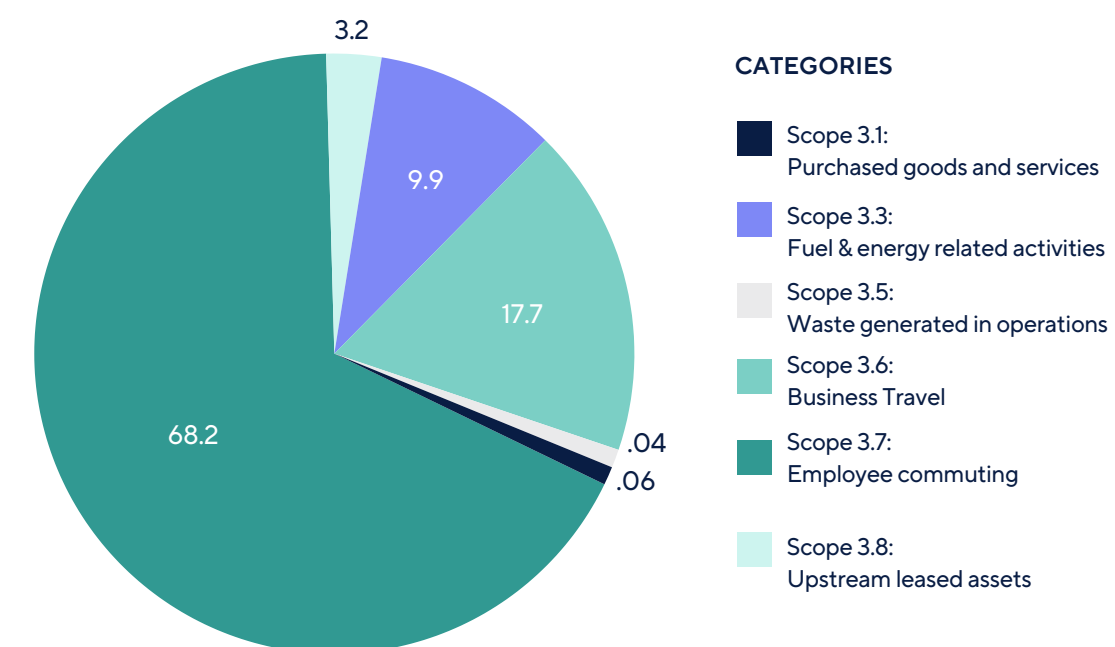
GHG Emission (cont.)

GHG Inventory in Metric Tons of Carbon Dioxide Equivalent (MTCO2e)

Emissions (mtCO2 e)	2022	2023	2024
[305-1] Scope 1		133.76	93
[305-2] Scope 2 (Location Based)			1,493
[305-2] Scope 2 (Market Based)		1,142.92	1,218
[305-3] Scope 3: Total	806.51	524.67	5,806
Scope 3.1: Purchased goods & services	64	9.71	34
Scope 3.3: Fuel & energy related activities	11.42	6.66	577
Scope 3.5: Waste	342.09	296.3	21
Scope 3.6: Business Travel	389	212	1028
Scope 3.7: Employee Commuting			3,963
Scope 3.8 Upstream leased assets			184
Total Emission (Scope 1+Scope 2 (Location Based)+Scope 3.	806.51		7,392
Total Emission (Scope 1+Scope 2 (Market Based) +Scope 3.		1,801.35	7,117

Scope 1 emissions decreased due to the implementation of energy-efficient technologies and the relocation from non-green to more sustainable office spaces, leading to reduced fuel use and direct emissions from combustion and refrigerants in our leased offices and data centers.

Emission Intensity

Our emission intensity, based on the Full-Time Workforce (FTW) metric, has decreased from 0.27 to 0.266. This reduction, despite a growing employee base, reflects our sustained focus on operational efficiency across global offices. Key contributors include the deployment of energy-efficient technologies, ongoing waste reduction efforts, and the introduction of an employee cab service in India, which are majorly shared cabs to reduce our employee footprint.

[305-4] Emissions Intensity (Scopes 1 & 2) tCO2e	2023	2024
Emissions intensity per full-time employee	0.272	0.266

GHG Emission (cont.)

Emission Reduction Efforts

In 2024, we advanced our climate strategy by initiating a thorough carbon footprint assessment across our major global locations, leveraging Novata— our sustainability data management platform. This initiative has enabled us to identify key areas for reducing greenhouse gas emissions and prioritize targeted action.

With 85.9% of our scope 3 emissions coming from employee travel and business travel, we focused in 2024 on building a robust system to engage, manage and reduce our Scope 3 emissions in the coming years.

The cab service in India is a key focus area, and we are monitoring feasibility of low emission services for our employees.

[305-5] We continue our collaboration with landlords to advocate for energy-efficient building improvements and, where necessary, transitioning to more sustainable leased spaces. These efforts are part of our broader commitment to responsible energy use, which is embedded in our workspace design, site selection, and resource management practices.

We have also made significant efforts to reduce our operational footprint. By maintaining a cloud-based work model, we are committed to a no paper usage policy in most of our offices, which reduces the carbon impact of digital communications promoting the use of shared links instead of email attachments.

Sustainable procurement remains a key focus. Wherever feasible, we source reusable or recycled materials for office, kitchen, and restroom use. These initiatives are part of our ongoing "Going Green" campaign, which continues in 2024 with a renewed emphasis on expanding recycling programs and phasing out single-use plastics.

We continue to strengthen our emissions reporting capabilities. While we've made significant progress since our initial assessments in 2022, our data collection framework is still evolving and not yet comprehensive across all sites. This is partly due to the complexities associated with shared spaces and smaller institutional landlords. As such, we have established 2023 as our baseline year for emissions tracking.

Energy Management

In 2024, our reporting focused on electricity consumption, which was available for approximately 60.7% of our occupied offices. For an additional 28.6%, we applied CBECS benchmarking estimates, enabling us to account for a combined total of 89% of our office space. Our energy consumption is majorly based on data provided by landlords for sites in USA, UK and India. Our independently leased office buildings where SitusAMC is the sole occupant, electricity usage is calculated based on actual consumption data. In multi-tenant buildings, where direct data may not be available, we estimate energy use using a combination of submetering (where available) and industry benchmarks such as the Commercial Buildings Energy Consumption Survey (CBECS). These estimates are guided by our space utilization (Square Footage) model and building-level end-use benchmarks.

[302-1] Our total recorded fuel consumption for 2024 includes electricity and heating data from locations where such information is available. However, detailed breakdowns especially for heating and cooling are difficult to obtain. Many of our offices, are in share or multi-tenant buildings, with centrally managed energy systems, making it difficult to isolate SitusAMC specific usage. Utility bills rarely separate figures for heating, cooling, and general electricity use.

Where direct data is unavailable, we rely on estimates based on space utilization and industry benchmarks. We continue to work toward improving data granularity and expanding our reporting coverage across all locations.

[302-4] 2023 will serve as the baseline year for future targets as we plan our net zero roadmap and expand our reporting capability.

Fuel Consumption within the Organization (KJ)	2022	2023	2024
Renewable sources	185,846,674	691,784,392	1,704,184,056
Non-renewable sources	16,794,616,353	11,430,020,282	10,048,400,640
Total	16,980,463,027	12,121,804,674	11,752,584,696

Fuel Consumption by Type (KJ)	2023	2024
Electricity consumption	9,421,314,422	10,029,357,004
Heating consumption	2,700,490,253	1,723,227,692

[302-3] Energy intensity (KJ)	2023	2024
Fuel consumption per full-time equivalent employee Heating consumption	2,590,129	2,391,166.77
Fuel consumption KJ per million (USD) revenue	16.98	16.35

Energy Efficiency Efforts

We are dedicated to enhancing our understanding of energy consumption and adopting a strategic, long-term approach to responsible energy use. This commitment is embedded in our workspace design, site selection, and resource management practices.

Access to accurate energy data is critical to inform decision making and monitoring energy conservative measures.

Our office layouts are designed to maximize natural light and ventilation through open-plan configurations, with minimally enclosed offices. We are modernizing our lighting infrastructure by replacing conventional bulbs with energy-efficient alternatives and installing motion sensors in low-traffic areas to reduce unnecessary energy use. To promote sustainable commuting, many of our locations are equipped with bicycle storage and shower facilities.

When selecting new office locations, we prioritize buildings that meet high sustainability standards. As of now, 48% of our global office space is housed in facilities certified by LEED, BREEAM, or equivalent green building standards. We are targeting an increase to 50% by 2030. In India, which hosts nearly half of our global workforce, over 50% of our offices are already LEED-certified. We are actively working to expand renewable energy adoption across our U.S. operations. But it is worth noting, however, that thanks to our flexible working practices, we anticipate our energy consumption to be lower than the average for these locations.

[303-5] Our global water consumption[1] throughout the year was 4,601 Megaliters. This year, the increase in our reported water consumption is primarily attributed to the expansion of our data collection efforts. We have broadened the scope to include more office locations across India, enabling a more comprehensive and accurate representation of our environmental footprint. This enhanced data coverage reflects our commitment to transparency and continuous improvement in sustainability reporting.

Percentage of Office Footprint in Green Certified Buildings

Year	Percentage
2024	48%
2023	43%
2022	34%
2021	26%
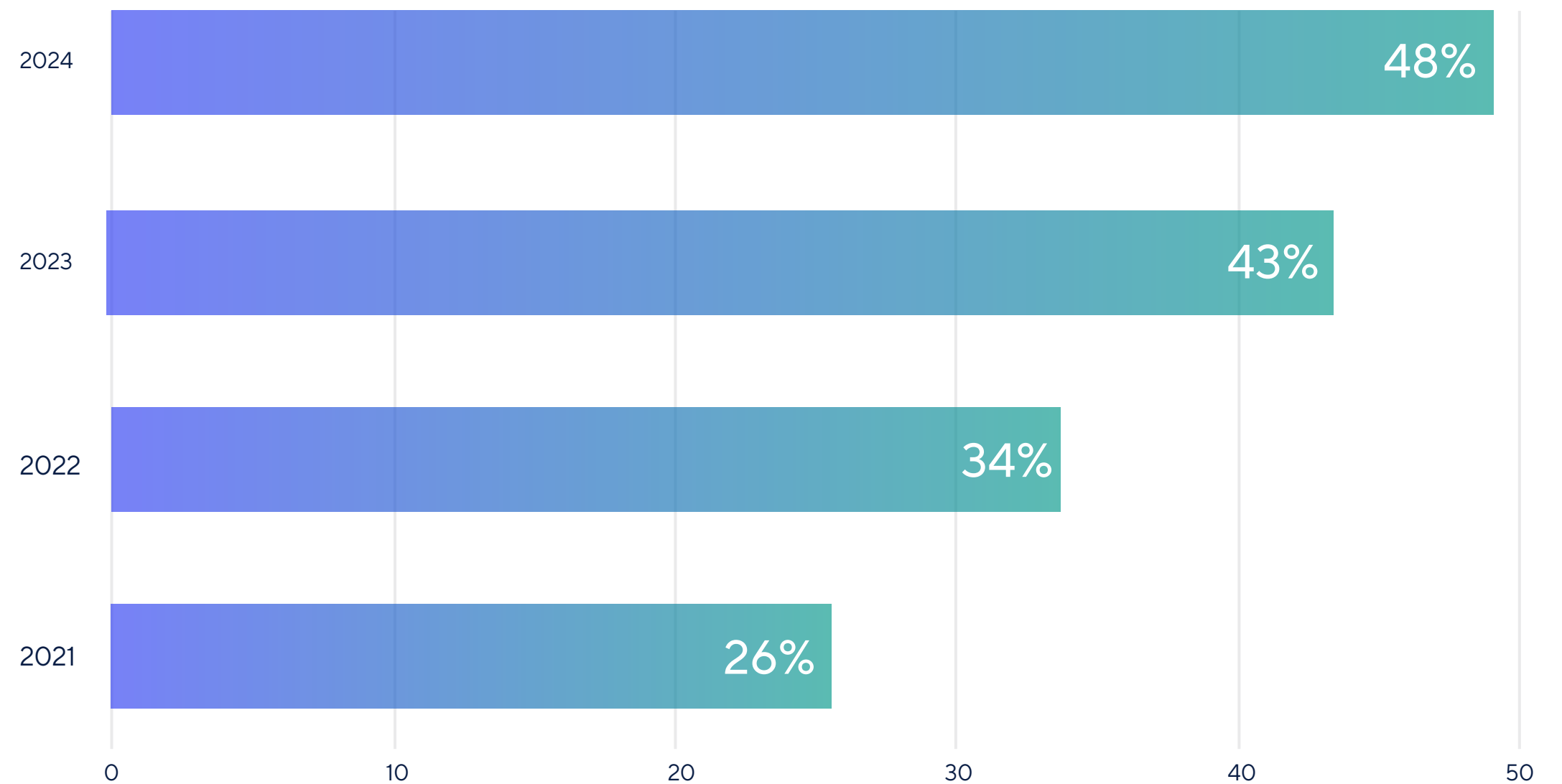
[1] For London and India locations

SitusAMC

Our Going Green Journey

Going Green Initiative

Launched in 2024, SitusAMC's Going Green initiative represents a bold step toward becoming an environmental and climate-conscious leader. Rooted in our mission to support the United Nations Sustainable Development Goals, the initiative focuses on educating our corporate citizens and fostering transparent communication with stakeholders on climate issues. By embedding sustainability into our culture through training, engagement, and operational improvements, we are not only reducing our environmental footprint but also aligning our actions with a broader vision to lead as a responsible, environmental and climate-conscious company committed to long-term impact.

As a direct result of education and communication, we have seen a marked increase in employee engagement, across our various platforms. With 500+ members in our Going Green community from when we started, these collective efforts not only support our internal sustainability goals but also reinforce our role as a stepping stone to climate action and transparent stakeholder communication.

"OUR GOING GREEN INITIATIVE IS BASED ON AWARENESS, DRIVEN BY PROACTIVE EFFORTS, AND SUPPORTED THROUGH ONGOING ENGAGEMENT. BY MAKING OUR WORKFORCE AWARE, EMPOWERED, AND EMBEDDING SUSTAINABILITY INTO EVERY LAYER OF OUR OPERATIONS, WE'RE NOT JUST MEETING TODAY'S ENVIRONMENTAL CHALLENGES—WE'RE BUILDING MOMENTUM FOR A GREENER, SMARTER FUTURE."

Meghna Tyagi
Assistant Manager,
Corporate Sustainability

2025 Sustainability Champions - Mumbai

SitusAMC Green Advocates - Episode2: John Buckles

Going Green Initiatives (cont.)

INITIATIVES	ABOUT INITIATIVE	IMPACT
CORPORATE		
MANDATORY ANNUAL TRAINING ON ENVIRONMENTAL MANAGEMENT	SitusAMC promotes mandatory annual training on Sustainability and Environmental management.	1) Increasing Awareness of our Corporate Citizens. 2) Communicating and enhancing sustainability practices in workforce.
UPDATES IN MONTHLY NEWSLETTERS & COMMUNITY PLATFORM	To foster engagement, we feature a monthly "ESG Insights" column in our internal newsletter, sharing sustainability updates across the organization. Additionally, our dedicated "Move the Chain" community—now with over 500 active members—serves as a collaborative space for employees to engage on environmental and sustainability initiatives.	Highlighting and updating our workforce on sustainability Initiatives being taken across the organization.
GREEN COMPETITIONS	Each year, we host a Global Green Competition centered on key environmental themes. In 2024, the focus is on Upcycling. To further engage employees, we've introduced gamified events—such as polls and rapid-fire rounds—at both office and global levels.	1) Increase Employee Engagement. 2) Encouraging our workforce to share their stories and actions towards the environment.
EXTEND LIFESPAN OF EXISTING ASSETS	The Corporate Sustainability team is collaborating with IT to explore strategic reuse and responsible decommissioning of electronic devices, aiming to extend asset lifespans and minimize resource-intensive replacements.	It aims at reducing costs and carbon emissions associated with new purchases of IT equipments.
SUSTAINABLE PROCUREMENT	We collaborate closely with Facilities and Procurement team to ensure that our supplier network is aligned with our sustainability criteria where we Focus on big spend suppliers of IT equipment.	Transparency for our clients on their Tier 2 supplier sustainability.
SUSTAINABLE LEASES	Take environmental impact into consideration when leasing building. Primarily: 1) Offices that utilize energy efficient lighting/cooling/heating. (SDG7) 2) Renewable energy in total final energy consumption. (SDG 7) 3) Proximity to office to public transport. (SDG 11) 4) Employees working In Clean fuel areas and where Climate risk mitigants are in place. (SDG 13)	To ensure alignment with goals and our commitment to both internal and external stakeholders by incorporating these categories into Green Lease considerations during the procurement of premises.
OFFICES		
RECYCLING BINS	Consistent evaluation of the availability of dedicated recycling and non-recycling bins within office premises.	1) Optimize and enhance waste segregation practices. 2) To keep a track and lower our waste footprint.
RECYCLING POSTERS	Placement of unique educational posters in prominent areas throughout our global offices.	Promoting and increasing recycling culture in our workforce.
REDUCE USE OF DISPOSABLE PRODUCTS	We have taken measures to reduce the use of disposable products, promoting reusable alternatives wherever feasible.	Reduction of waste and associated emissions with dumping of the disposable prducts.

SitusAMC

Climate Action

Climate Action

In 2024, SitusAMC was awarded a 'C' rating by CDP, indicating our initial advancements in climate-related disclosure and environmental management, an improvement from our earlier rating of 'D'. While this rating indicates that we are in the awareness stage of our sustainability journey, it also provides a valuable benchmark for improvement. We recognize the importance of transparent climate reporting and are committed to enhancing our data quality, governance practices, and emissions reduction strategies.

This rating serves as a catalyst for deeper engagement and continuous improvement as we work toward aligning with global best practices in environmental stewardship. Looking ahead, our goals include setting emissions reduction targets, expanding Scope 3 emissions reporting, and increasing transparency through more robust climate-related disclosures. These efforts will support our ambition to maintaining or achieving higher CDP ratings in future assessments and align more closely with global sustainability standards.

Climate Risks & Opportunities

[201-2] As the frequency and intensity of natural disasters continue to escalate globally, our organization acknowledges that climate change poses significant operational challenges.

Our organization identifies and manages both physical and transition risks associated with climate change to ensure operational continuity and business resilience.

Physical Risk

SitusAMC recognizes the potential growing physical impacts of climate change on its global operations and is proactively monitoring key environmental risks. These include rising temperatures, increased flooding, and the heightened frequency and intensity of hurricanes and cyclonic storms all of which have the potential to disrupt business continuity.

Acute Risk

Climate induced hazards such as floods, hurricanes, and wildfires can pose a significant threat to firm's offices, infrastructure and operations. These risks can lead to restricted access to office locations, endanger employee safety, and cause damage to infrastructure and equipment.

Chronic Risk

The temperature changes contribute to elevated maintenance costs and diminished operational efficiency. Given the presence of long-term leases, the organization maintains a moderate level of exposure to these chronic climate related risks.

In response, we are implementing a comprehensive set of mitigation strategies such as maintaining a robust Business Continuity Plan (BCP), including employee emergency messaging system, supported by a well-established Work-from-Home (WFH) infrastructure if required and the deployment of AWS cloud services, which collectively minimize operational disruptions and mitigate data loss risks. These also include conducting annual risk assessments, which strengthens our business continuity and disaster recovery frameworks, investing in climate-resilient infrastructure, and enabling flexible remote work arrangements during extreme weather events. These initiatives reflect our broader commitment to sustainability and enhancing the resilience of our operations in an evolving climate landscape.

Legal Risk

The physical impacts of climate change have accelerated the global transition to a low-carbon economy, bringing with it a complex landscape of evolving regulatory frameworks and mandatory climate disclosures.

SitusAMC remains committed to full compliance with all applicable environmental regulations and actively monitors developments in international climate risk frameworks to ensure alignment. To support this commitment, we have comprehensive regulatory tracker that systematically monitors changes in existing regulations and new regulations. This enables us to assess the implications of regulatory shifts on both our internal operations and our clients.

Reputational Risk

SitusAMC recognizes the growing expectations from clients, investors, and stakeholders for greater transparency in sustainability performance and climate related disclosures. In response, we have adopted a Corporate Sustainability Policy that is grounded in the principles of the United Nations Global Compact (UNGC) and aligned with the United Nations Sustainable Development Goals (UN SDGs). We regularly report on our climate risk exposure and management strategies through leading sustainability assessment platforms, including EcoVadis and the Carbon Disclosure Project (CDP), reinforcing our commitment to transparency and accountability.

Letter from the CEO

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SitusAMC

People & Culture

People & Culture

SitusAMC is deeply committed to fostering a culture in which every individual feels safe, valued, and empowered to thrive.

We prioritize safety, encouraging open communication, mutual respect, and inclusivity at all levels. Through the promotion of an atmosphere that appreciates varied opinions and supports collaboration, we enable our workforce to bring their authentic selves to work. Through continuous learning opportunities, supportive leadership, and a strong emphasis on employee well-being, we cultivate a workplace where innovation flourishes, and individuals are inspired to grow both personally and professionally.

SitusAMC is headquartered in New York, with operations in 25 locations across five countries. In 2024, we employed over 4,915 people across three regions: the USA, Europe, and India. Most of our employees are full-time and permanent.

North America
New York, NY
Amherst, NY
Atlanta, GA
Auburn, AL
Boca Raton, FL
Charleston, SC
Denver, CO
Des Moines, IA
Houston, TX
Jacksonville, FL
Overland Park, KS
Plymouth Meeting, PA
Roseville, CA
San Francisco, CA
St. Petersburg, FL

EMEA
London, UK
Frankfurt, GER
Dublin, IRE

APAC
Chennai, IND
Mumbai, IND
Gurgaon, IND
Bengaluru, IND
Hyderabad, IND
Pune, IND

People & Culture (cont.)

Employers Per Region

[401-1] We welcomed 1,258 new joiners during the reporting year, while 1,349 left the organization.

New Joiners	2023	2024
Total	661	1,258

Full-time employees, by region	2023	2024
USA	1,881	1,851
India	2,405	2,764
Europe	80	94
Total	4,366	4,709

Part-time employees, by region	2023	2024
USA	312	189
India	0	11
Europe	2	6
Total	314	206
Total Employees	**4,680**	**4,915**

Inclusion & Belonging

At SitusAMC, we are dedicated to attracting, developing, and retaining talent across all levels and areas of our organization. We recognize and value the unique qualities and perspectives everyone brings. By empowering our employees with the right opportunities, knowledge, and tools, we enable them to take charge of their success and build meaningful careers.

[202-1] We believe in paying all our employees a fair wage based on market rates, locations, skills, and experience, and are dedicated to promoting pay equity throughout all regions of operation. As part of this commitment, we pledged in 2022 to implement a living wage plan across our global locations. We are pleased to share that as of 2024, we have exceeded this promise by paying above the standard minimum rate for entry-level roles.

Our ongoing pay equity strategy includes standardization of pay across job bands, and a benchmarking review. These efforts are in line with our industry peers, ensuring that we are building a more equitable compensation system for our valued employees.

Our global teams thrive in an environment that offers career growth, recognition, and a supportive culture. We provide comprehensive training and resources to help our teams expand their business and technology skills, deepen their expertise, and foster greater awareness of unconscious bias. A strong sense of inclusion and belonging is thoughtfully embedded in our values and global learning programs.

Employee Resource Groups

We recognize that our Employee Resource Groups (ERGs) play a vital role in fostering a culture of belonging, support, and empowerment across the organization. These employee-led groups provide safe spaces for individuals to connect shared identities, experiences, and interests—whether related to general perspectives or professional development. ERGs not only help amplify employee voices but also contribute to engagement, cross-functional collaboration, and cultural awareness. By supporting ERGs, we are investing in a more inclusive workplace in which every employee feels seen, heard, and valued, ultimately driving innovation and strengthening our organizational resilience.

After the successful launch of the Women's Network in 2023, in 2024, the Working Parents & Caregivers and Rising Professionals ERGs were established.

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BEING PART OF THE ERG'S IS TRULY MEANINGFUL. IT CONNECTS COLLEAGUES ACROSS THE GLOBE AND SUPPORTS THOSE BALANCING WORK WITH CAREGIVING—LIKE ME, AS A PARENT OF A NEURODIVERGENT ADULT CHILD. IT'S A VALUABLE RESOURCE FOR SO MANY OF US.

Donna Harden
Working Parents and Caregivers,
Board Member
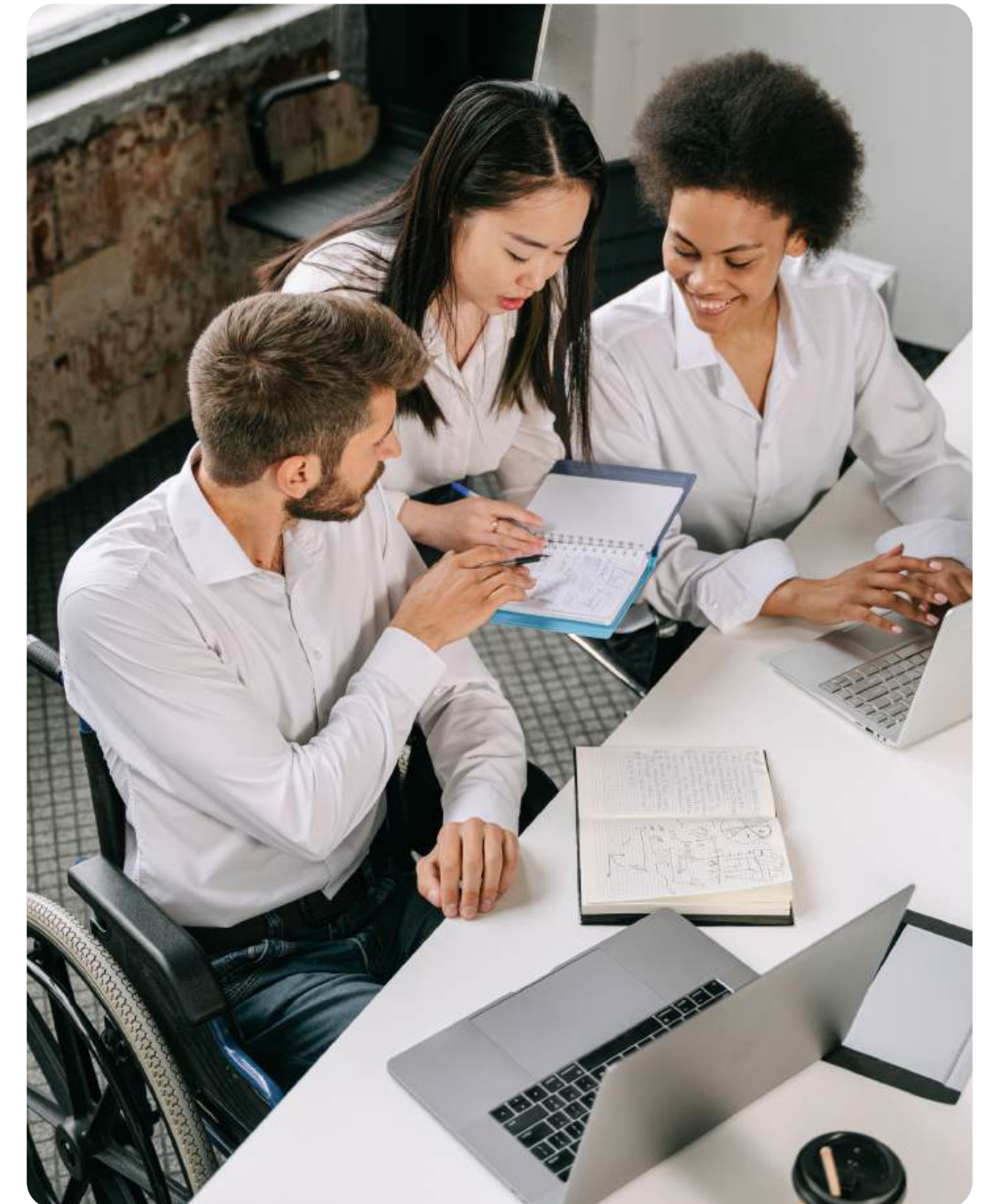
Inclusion & Belonging (cont.)

Rising Professionals

Members Since Launch 262

Rising Professionals (RP), launched in Q4 2024, is the newest Employee Resource Groups at SitusAMC, aimed at empowering early-career professionals through a community that is supportive, inclusive, and focused on growth. Rising Professional is committed to addressing the unique challenges that our workforce faces by fostering mentorship, encouraging innovation, and providing meaningful opportunities for development and collaboration across the organization. Since its inception, Rising Professional has seen rapid growth, currently engaging over 260 active members. Through its initiatives, 1,085 employees have completed a total of 11,102 non-mandatory training courses on Workday, indicating a strong culture of continuous learning. Looking ahead to 2025, the ERG seeks to expand its impact by offering more pathways for professional development, mentorship, and cross-functional engagement, helping rising professionals thrive within SitusAMC and the broader industry.

"RISING PROFESSIONALS IS MORE THAN AN ERG—IT'S A MOVEMENT. IT'S ABOUT UNLOCKING THE POTENTIAL OF EMERGING TALENT, FOSTERING A CULTURE OF MENTORSHIP AND INNOVATION, AND BUILDING THE FUTURE OF SITUSAMC THROUGH THE PASSION AND PURPOSE OF OUR NEXT GENERATION OF LEADERS. I AM PROUD OF OUR ACHIEVEMENTS WITHIN THIS BRIEF TIME AND LOOKING AHEAD OUR GOAL IS TO KEEP OFFERING MORE AVENUES FOR LEARNING, MENTORSHIP, AND COLLABORATION."

James Choi
Rising Professionals,
Executive Sponsor

Working Parents & Caregivers

Members Since Launch 376

Balancing professional responsibilities with caregiving roles presents unique challenges to employees. This ERG has provided invaluable support to its members, creating a space where employees can connect, share experiences, and exchange practical caregiving advice. By encouraging open dialogue and offering flexible resources, we aim to create a workplace where caregivers feel supported, valued, and better equipped to manage their dual roles and progress in their professional lives.

"I'M EXCITED TO HELP LAUNCH NEW SPACES FOR PARENTS AND CAREGIVERS—PLACES TO CONNECT, SHARE, AND SUPPORT ONE ANOTHER. WHEN WE SUPPORT EACH OTHER AT HOME AND AT WORK, WE STRENGTHEN OUR ENTIRE COMMUNITY."

Teddy Nordlund
Working Parents & Caregivers,
Board Member

Women's Network

Members Since Launch 711

"AS THE EXECUTIVE SPONSOR OF THE WOMEN'S NETWORK, LAUNCHING THE FIRST MENTORSHIP PROGRAM FOR SITUSAMC WAS A HUGE ACHIEVEMENT FOR OUR ERGS AND A NEEDED BENEFIT TO OUR MEMBERS. WE BELIEVE IN CULTIVATING A SUPPORTIVE ENVIRONMENT WHERE MENTEES CAN TAKE RISKS, LEARN FROM SETBACKS, AND ULTIMATELY THRIVE. MENTORSHIP IS AN INVALUABLE INVESTMENT, NOT JUST FOR THE MENTEE, BUT FOR THE ENTIRE ORGANIZATION AND COMMUNITY."

Kathleen Collins
Women's Network,
Executive Sponsor

Learning and Development

We take an inclusive approach to learning, and our aspiration is for employees and leaders to continue to be accountable for their own performance, development, and career. We help all employees understand the learning programs and resources available to enable skill development that maximizes performance in their current roles and prepare them for future roles.

Our teams benefit from on-the-job exposure to a wide range of clients, areas of business, and processes, allowing them to build the skills and confidence for their roles. We pride ourselves on the accessibility to lean on one another, share ideas, and develop solutions – together.

Each of our employees also receives ongoing training, including annual compliance requirements such as insider trading, ethics, anti-bribery and corruption topics, among other issues relevant to being employed by a registered investment adviser. All employees must also complete a Sustainability training module during the year.

"THE LEARNING & DEVELOPMENT TRAININGS HAVE SIGNIFICANTLY HELPED ME ENHANCE MY PROFESSIONAL CAPABILITIES, EQUIPPING ME WITH THE SKILLS AND CONFIDENCE TO EXCEL IN MY ROLE AND CONTRIBUTE MORE EFFECTIVELY TO THE ORGANIZATION."

Dharmendra Kumar
Senior Analyst

[404-1][404-2] We offer a robust digital learning ecosystem through Workday Learning, featuring 567 open-enrollment courses accessible to all employees and contingent workers. In addition, 167 targeted digital courses are available for assignment by our Training team to support specific development needs. We actively promote a culture of continuous learning by encouraging employees to identify skill gaps and seek support from their managers. This initiative ensures equitable access to learning resources and empowers our workforce to grow in alignment with our sustainability and organizational goals. Courses available include:

- MBA Commercial Mortgage Servicer: Level I Certification
- MBA Courses
- CRE Loan Basics & Fundamentals
- CRE Due Diligence UW Training
- RRE Due Diligence UW Training
- Income training for RRE Due Diligence Audits
- RRE Mortgage Basics & Fundamentals
- Excel Training
- Aurora Training – self-paced modules for Human Resources

Further courses cover personal development, leadership, health and wellness, financial wellness, inclusion and belonging, and industry-specific learning.

In-person training sessions are available to help employees upskill or transition to new roles. These courses are typically based around demonstration, e-learning, practice, and assessments.

Regular full-time employees are also eligible to participate in our Education Allowance Program. This benefit enables employees to access funding for job-specific training, certifications, or personal development.

We also offer the Guide to Leaving for transitioning employees to help them in their next career or life stage.

[404-1] Average hours of training by employee type	2023	2024
Senior Management	10.3 hours	7.82 hours
Middle Management	11.7 hours	13.49 hours
Individual Contributor	13.6 hours	11.01 hours
Sales & Marketing	8.6 hours	6.77 hours
Legal & Regulatory	11.8 hours	9.57 hours
Support Functions	12.2 hours	9.54 hours

Reduction in Average Training Hours

Change in Training Provider
The new training provider introduced more efficient delivery methods and streamlined content. This transition led to shorter course duration without compromising the quality of learning.

Streamlining of Compliance Training
The compliance training curriculum underwent a comprehensive review, resulting the removal of redundant content and a sharper focus on core requirements. The refinement significantly reduced the time required to complete mandatory compliance modules.

Increase in Training Hours for Middle Management

In contrast to the overall trend, middle management experienced an increase in training hours, due to the implementation of a targeted Leadership Development program designed to strengthen leadership capabilities and support succession planning within this key group.

Learning and Development (cont.)

Performance and Success

We are committed to fostering a workplace culture where individuals feel empowered, supported, and equipped to reach their full potential. [404-3] As part of this commitment, all employees—excluding those on parental or extended leave—participate in regular performance and career development reviews. These reviews are designed to be meaningful and forward-looking, providing employees with the opportunity to engage in one-on-one discussions with their managers. These sessions focus on tracking progress towards individual and team goals, exploring career aspirations, and receiving personalized mentoring on both strengths and areas for development.

In addition to ongoing check-ins, we conduct a comprehensive year-end performance review process. This structured evaluation assesses employee performance against predefined objectives and includes a holistic review of an employee contributions, professional growth, training requirements, and readiness for advancement. Outcomes from this process inform decisions related to promotions, compensation adjustments, and future development opportunities. Through these practices, we aim to cultivate a high-performance environment that values continuous learning, recognizes achievement, and supports long-term career progression.

Regular performance and career development review remain steady at over 99% for our employee base.

Regular performance and career development review

	2023	2024
Total regular performance and career development review completed.	99.38%	99.42%
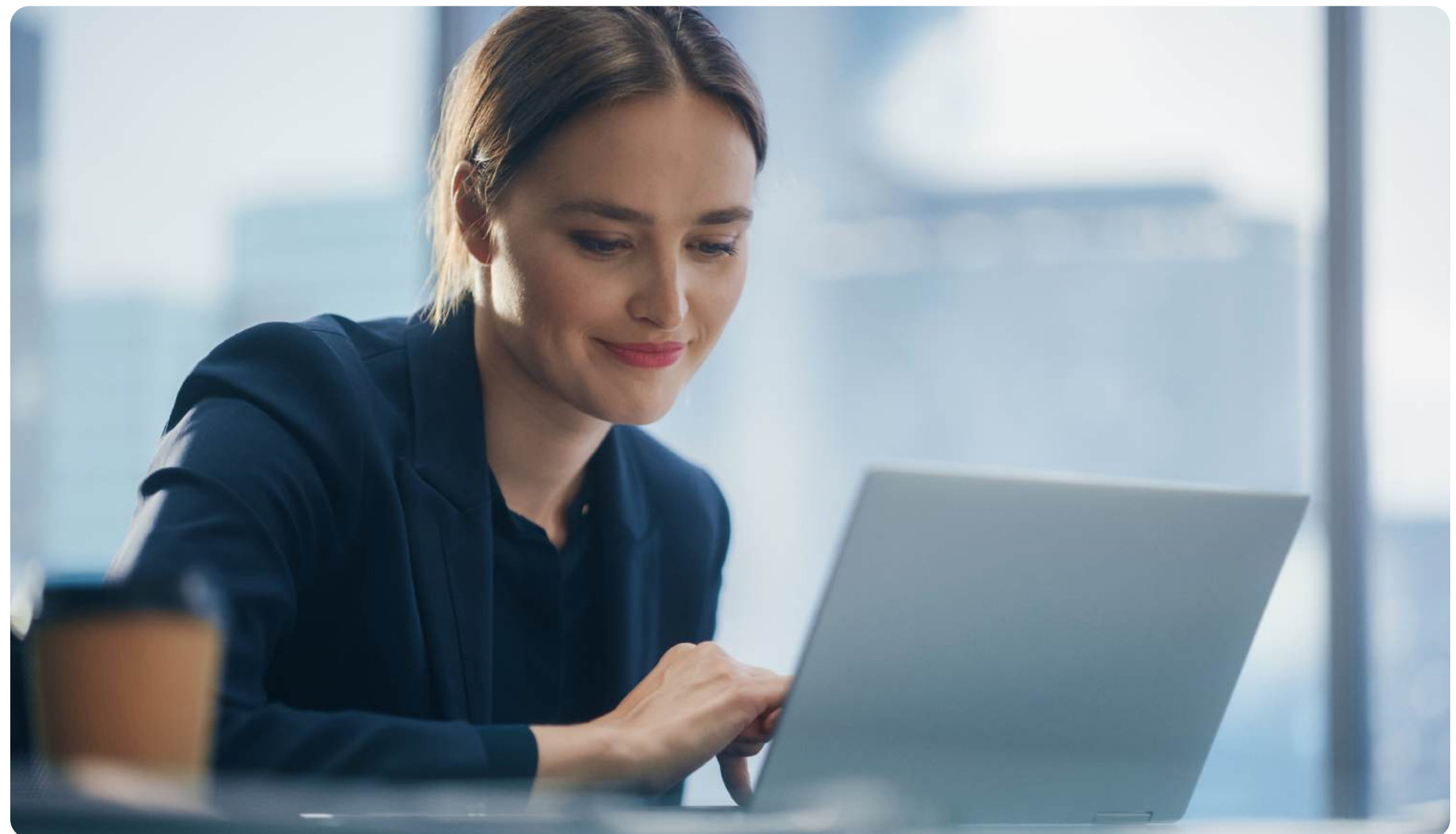
Employee Engagement

SitusAMC has continued to demonstrate our commitment to establishing a growing and engaging workplace.

We have always focused on the alignment of our employee engagement with our business objectives by prioritizing attracting and retaining talented individuals, while fostering a culture that encourages innovation, collaboration, and sustainable performance.

At the core of employee engagement are the fundamental elements that shape our identity: our organizational culture, employee experience, and recognition systems.

Feeding Tampa Bay

Connecting Colleagues

In 2023, we enhanced our internal employee engagement platform, "Move the Chain," a key tool designed to keep our people feeling connected, valued, and empowered.

Employees regularly share thought pieces, conduct polls, and invite feedback, cultivating a culture of openness and inclusion. Expanded community features enable employees to connect through interest-based groups, local office networks, and employee resource groups.

The platform also serves as a central hub for event updates, helping employees stay informed and involved in company activities. As a result, Move the Chain has significantly strengthened internal communication, increased employee involvement, and reinforced our commitment to a connected and collaborative workplace.

MOVE THE CHAIN - BY THE NUMBERS

69% of Employees were on MTC Generating >	28 Employee Initiated Communities	2,108 Posts
	1,711 Comments	60,868 Reactions

Ping Pong Night at Spin - NYC

Employee Engagement (cont.)

Voice of the Employee Survey

Evaluating employee engagement continues to be an important priority that allows us to identify new ways to help our employees succeed and chart their own course.

In 2024, we significantly enhanced our Voice of the Employee (VoE) program to further strengthen our commitment to listening to and acting on employee feedback. The program continues to provide a formalized, global, and anonymous feedback mechanism, empowering our teams to share their perspectives openly. The continued increase in participation demonstrates the value our employees place in sharing their views.

Our Positive Net Promoter Score (NPS) rose to 91, a 12 point improvement over 2023, positioning us four points above the true benchmark and one point above the commercial and professional services benchmark.

We continue to leverage the Workday Peakon Employee Voice platform, ensuring transparency and accessibility. All employees can view survey results, while leaders have access to team-specific insights based on defined thresholds. Global and divisional results are promptly shared with the Executive Leadership Team (ELT), and key highlights are communicated to all employees during town hall sessions.

These enhancements reflect our ongoing dedication to fostering a culture of continuous improvement, transparency, and employee empowerment.

Promoting a Culture of Recognition & Appreciation

In 2024, we continued to strengthen our commitment to recognizing the contributions of our employees, who consistently go above and beyond in delivering value to our clients and advancing our industry.

Aligned with our core values of integrity, collaboration, and excellence, we believe that meaningful recognition not only reinforces positive behaviors but also supports talent retention and cultivates a workplace where individuals feel respected and empowered.

Our Global Rewards and Recognition Program plays a central role in this effort, offering employees multiple avenues to acknowledge and celebrate achievements. Through our digital platform, Move the Chain team members can publicly recognize colleagues' contributions, while managers are notified to amplify visibility and celebrate success across teams.

Our iPower awards recognize and celebrate those employees who go above their day to day to deliver excellence for SitusAMC and their colleagues.

In 2024, 36 employees were recognized via the iPower awards.

Voice of the Employee Participationin Rate

Year	Participation Rate
2022	59%
2023	86%
2024	91%
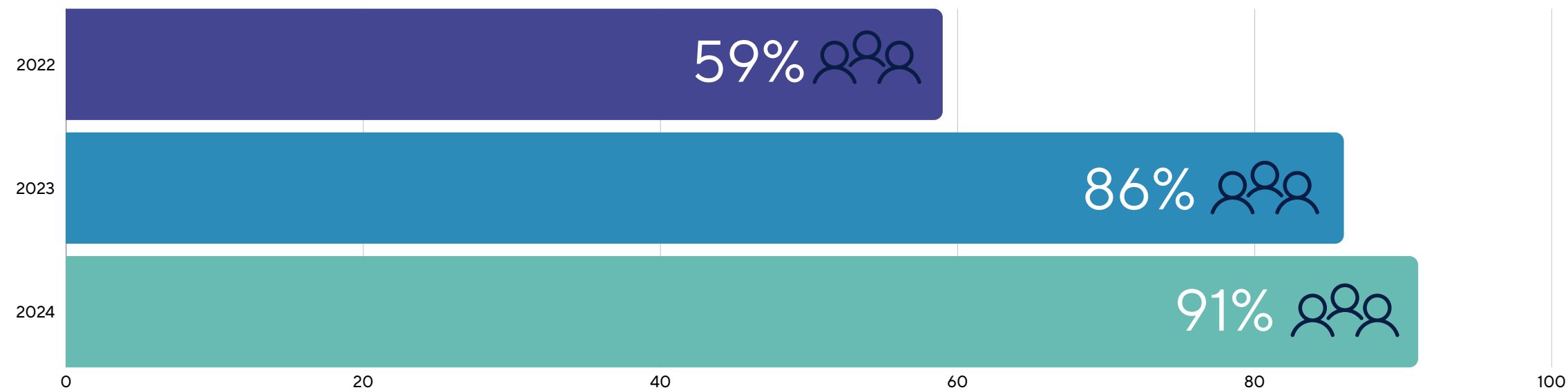
Employee Engagement (cont.)

Great Place to Work® Certification in India

In 2024, our commitment to employee experience was further validated by earning the Great Place to Work® Certification in India, a recognition based entirely on employee feedback. This achievement reflects the strength of our workplace culture and the impact of our ongoing efforts to create a positive and rewarding environment. With an impressive 89% participation rate in the certification survey, our employees voiced strong confidence in the safety, inclusivity, and excellence of our workplace. Notably:

- 89% of employees affirmed that SitusAMC India is a physically safe place to work.
- 84% of our customers would rate the service we deliver as "excellent".
- 81% of our employees feel good about the ways they contribute to the community.

We ranked in the top 25% of Professional Services companies in the areas of Recognition and Performance and Change and Transformation.

These results are a testament to our strategic focus on employee well-being, inclusion, and continuous improvement—pillars that align closely with our broader sustainability and organizational goals.

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"WE ARE DEEPLY GRATEFUL TO OUR INDIA EMPLOYEES AND LEADERS FOR THEIR TRUST AND SUPPORT IN GETTING US CERTIFIED BY GREAT PLACE TO WORK. WE WILL CONTINUE TO FOSTER A POSITIVE AND ENRICHING ENVIRONMENT WHERE OUR EMPLOYEES FEEL VALUED AND RESPECTED. THE GREAT PLACE TO WORK CERTIFICATION MOTIVATES US TO CONTINUE ENHANCING OUR PEOPLE AND CULTURE CENTRIC EFFORTS, AIMED AT IMPROVING EMPLOYEE WELL-BEING, EQUITY, AND ENGAGEMENT.."

Priyankar Ghosh
Managing Director,
Head of Shared Services.

Embedding Recognition & Well-being Into Our Culture

We believe that a great workplace is built and shaped by daily actions, shared values, and a collective commitment to growth and care. In 2024, we launched several impactful initiatives to enhance employee experience and foster a culture of wellness and sustainability.

Employees across our offices regularly participate in environmental and social volunteering initiatives, for which they are recognized with compensatory time off. In support of holistic health, comprehensive health and wellness camps offering essential screenings and checks were organized. To further enhance well-being of our employees, we conducted a series of engaging wellness programs, including the high-energy "Move & Groove with Zumba" session to foster fitness and team spirit, a guided mindfulness session led by Loop Health, our insurance partner in India, to promote health and stress management, and a spirited Fitness Challenge aimed at inspiring healthier lifestyles among our colleagues.

Looking Ahead

Achieving the Great Place to Work® Certification is not just a recognition—it is a responsibility. It reinforces our commitment to fostering a work environment in which each person feels secure, acknowledged, and motivated to succeed. As we progress, we stay devoted to integrating sustainability, equity, and well-being into the foundation of our employee experience.

SitusAMC will continue to invest in initiatives that support our people and the planet, ensuring that our workplace remains not only great—but truly exceptional.

Employee Well-Being

We are committed to fostering a workplace environment that supports the holistic well-being of our employees. In 2024, we continued to invest in programs and initiatives that promote all sort of wellness, including and not limiting to physical, financial, and social wellness, recognizing that a healthy and supported workforce is essential to long-term organizational success.

Our well-being framework is designed to be inclusive and adaptable, offering a range of voluntary programs and services tailored to meet the needs of our global workforce. These include health rewards initiatives, stress management resources, family support services, and financial wellness sessions hosted by our Senior Management, including our Chief Financial Officer (CFO).

Taking Care of Our People

Our approach ensures that employees across all regions feel valued and empowered to thrive.

[401-3] One of the key pillars of our well-being strategy is our commitment to supporting employees through life transitions. Our comprehensive parental leave policies, which vary by country, are designed to enable employees to prioritize their families without compromising their professional growth. In the United States, for example, employees are eligible for eight weeks of parental leave at full base pay, with an average of 7.5 weeks taken to bond with a newborn or newly placed child.

[403-6] The organization offers all employees voluntary medical benefits, access to regional health events, and an Employee Assistance Program (EAP). We make all information accessible via the company intranet site, open enrollment, vendor websites, and written communications.

[401-2] [403-6] Benefits available to all employees at all locations include the following:

- Life insurance
- Health care
- Disability and invalidity coverage
- Parental leave
- Retirement provision
- Disaster relief program

Further benefits such as counselling services, critical illness cover, and employee discounts are available.

Health & Safety

We prioritize the integration of Health, Safety, and Environmental (HS&E) principles into our core business practices. Throughout 2024, we advanced this commitment by embedding HS&E considerations across our operations to promote employee well-being and support high-quality outcomes.

We recognize that a safe, inclusive, and empowering work environment enables our people to thrive both professionally and personally. This, in turn, enhances employee satisfaction and strengthens our ability to deliver exceptional results for our clients. By aligning our HS&E initiatives with our broader sustainability goals, we reaffirm our dedication to responsible corporate practices and the long-term success of our workforce and organization.

[403-1] [403-5] [403-7] SitusAMC is committed to maintaining a safe and healthy work environment by adopting a proactive and preventive approach to occupational health and safety. In 2024, we continued to strengthen our safety culture through comprehensive training, clear communication, and regular oversight.

All employees are required to complete mandatory health and safety training during onboarding, with annual refresher courses to ensure continued awareness and compliance. The training curriculum includes modules such as Healthy Working, Workplace Safety, fostering a Culture of Support, and Remote Working: Creating the Right Environment. These programs are designed to equip employees with the knowledge and tools necessary to maintain a safe and productive work environment, regardless of location.

Employee Well Being(cont.)

All employees are required to complete mandatory health and safety training during onboarding, with annual refresher courses to ensure continued awareness and compliance. The training curriculum includes modules such as Healthy Working, Workplace Safety, fostering a Culture of Support, and Remote Working: Creating the Right Environment. These programs are designed to equip employees with the knowledge and tools necessary to maintain a safe and productive work environment, regardless of location.

Employees are also provided with clear guidance on how to raise health and safety concerns, ensuring transparency and responsiveness in addressing potential risks. The Employee Handbook serves as a central resource, offering both company-wide and location-specific health and safety information.

To further support our safety infrastructure, all large office locations are staffed with fire marshals and undergo regular health and safety audits to ensure compliance with internal standards and local regulations. And, as part of our broader framework, we are increasing our network of dedicated first aid responders. These individuals will undergo certified training from qualified external agencies, equipping them with the skills necessary to respond swiftly and effectively to medical emergencies. This initiative not only enhances our emergency preparedness but also reinforces our commitment to safeguarding our employees in every situation.

Beyond safety, we are equally focused on enhancing the overall workplace experience. In December 2024, we transitioned into a new, state-of-the-art office space in Pune. This reflects our dedication to providing employees with a modern, comfortable, and collaborative environment. The new facility offers improved amenities, increased space, and a thoughtfully designed layout that supports both individual productivity and team collaboration.

By investing in both physical safety and workplace quality, we aim to foster a culture of care, trust, and engagement—one where employees feel valued, motivated, and empowered to do their best work.

Through these measures, SitusAMC reinforces its commitment to safeguarding the well-being of its workforce and upholding the highest standards of occupational health and safety across all operations.

[403-2] [403-9] [403-10] SitusAMC is primarily an in-office and remote office workforce with no high-risk hazards. We have evaluated potential hazards and identified the most likely type of injury to be related to repetitive use, poor ergonomics, or a slip and fall as employees walk to and from workstations. We provide ergonomic workstation evaluations and related equipment.

[403-3] [403-4] The training, HR, and facilities department heads evaluate and develop occupational health and safety management, consultation, training, protocols, communications, and reporting for the organization.

Habitat for Humanity

[403-8] Our health and safety management system follow the country's requirements where it is operational and covers our global workforce.

- USA – Occupational Safety and Health Administration standards
- UK – Health and Safety at Work Act
- Europe – European Agency for Safety and Health at Work EU
- OSHA India – Occupational Safety Health and Working Conditions Code

An injury and incident log are maintained and tracked for all reported injuries or incidents throughout the year. Each region tracks and reports their incidents in accordance with local Health and Safety regulations.

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"AT SITUSAMC INDIA, THE HEALTH, SAFETY, AND OVERALL WORKPLACE EXPERIENCE OF OUR EMPLOYEES REMAIN A TOP PRIORITY. THROUGH REGULAR HEALTH AND SAFETY AUDITS AND PROACTIVE INITIATIVES, WE FOSTER A SECURE AND SUPPORTIVE ENVIRONMENT THAT ENHANCES BOTH MORALE AND PRODUCTIVITY. OUR RECENT MOVE TO A NEW, MODERN OFFICE IN PUNE—WITH IMPROVED AMENITIES AND A MORE SPACIOUS LAYOUT—REFLECTS OUR ONGOING COMMITMENT TO CREATING A WORKPLACE WHERE OUR TEAMS CAN COLLABORATE, INNOVATE, AND THRIVE."

Gokul Venkat
Senior Director,
Facilities – India

SitusAMC

Supporting Our Communities

Supporting Our Communities

At SitusAMC, we believe in giving back. Through volunteering and donations, we're building stronger, more connected communities.

Wish For Wheels – Denver, CO

SitusAMC takes a holistic approach to meet the evolving needs of our communities through our philanthropy and volunteerism program. Through direct contribution from the company and our employees including volunteer time-we make a difference in communities where we live and work.

[413-1] Our continued partnerships with Habitat for Humanity in the United States enabled employees to contribute to local housing projects through organized build days. In India, our collaboration with the Vrikshit Foundation supported initiatives including the donation of educational kits to underprivileged children and community clean-up drives, reinforcing our commitment to education and environmental stewardship. In the U.K. our employees supported a local Youth Centre designed as a safe space for school-aged children to attend after school.

We encourage our employees to contribute their time and expertise to causes that matter to them. Many have independently served on non-profit boards, volunteered in schools, and supported grassroots initiatives.

Through our Company Volunteer Program, full-time employees are granted one paid day annually to engage in volunteer activities. In 2024, this program recorded 2,362 hours of volunteer service across our global offices, and increase of 60% from 2023.

These efforts underscore our belief that empowering employees to give back not only strengthens communities but also enriches our organizational culture and aligns with our broader sustainability objectives.

2024 VOLUNTEERING RESULTS

$260,000
Corporate Charitable Contributions

$10,000
Employee Donations Matched

2,362
Hours Volunteered

70+
Beneficiary Organizations

Supporting Our Communities (cont.)

What Our Partners Have to Say

Habitat for Humanity

Situs is proud to partner with Habitat for Humanity to support affordable housing and resilient communities across the U.S. Through this partnership, Situs employees have actively contributed to Habitat's mission by volunteering on build sites, supporting fundraising efforts, and advocating for housing equity. Together, we are helping to create lasting, positive impact—providing families with safe, stable housing while reinforcing our shared commitment to corporate social responsibility and sustainable development. Our collaboration reflects a deep alignment in values and a joint investment in building a better future for all.

"Our partnership with SitusAMC reflects our shared commitment to housing equity, community resilience, and sustainable development. Through volunteerism and advocacy, SitusAMC employees are proud to help build safe, stable homes and a better future for families across the U.S."

- Garrett Heaberlin, Senior Corporate Development Officer

Future Youth Zone

Our partnership with Situs has supported young people from disadvantaged backgrounds to build aspirations and reach their potential through inspiring activities and youth work. With Situs' support, our state of the art facility in East London has offered young people somewhere safe, warm and inspiring 7 days a week, 52 weeks a year. From cooking to climbing, boxing to dance, young people can do what they love, whilst making friends and getting support for the challenges they face. We loved welcoming Situs colleagues to our Holiday Club where they surprised young people with an amazing Easter Party. Thank you Situs!

"With SitusAMC's support, we've been able to provide young people in East London with a safe, inspiring space to grow, connect, and thrive— every day of the year. Their partnership has helped turn aspirations into opportunities."

- Emma Sorrell-Roberts, Head of Fundraising

Vrikshit Foundation

Our partnership with SitusAMC has yielded meaningful community impact through initiatives such as clean-up drives, tree plantation efforts, and the donation of school kits and solar lamps. The team's strong commitment to service has significantly enhanced our collective efforts, demonstrating the strength of collaboration. We value this relationship and are committed to driving continued positive change together.

"Our partnership with SitusAMC has driven meaningful community impact — from clean-up drives and tree plantations to the donation of school kits and solar lamps. Their unwavering commitment to service exemplifies the power of collaboration in creating lasting change "

- Shankar Singh, Founder

Supporting Our Communities (cont.)

Corporate charitable contributions

In a further commitment to creating a positive impact, the company operates an annual matching program for documented employee donations to organizations that reflect our areas of focus:

- Registered charities and causes that supported by our employees – up to USD 100,000

During the year, we helped to raise over USD 260,000, with USD 150,000 donated by SitusAMC and USD 10,000 donated by employees. Organizations that benefited included:

- Fibrolamellar Cancer Foundation
- American Red Cross
- Folds of Honor
- Girls Who Code
- Ronald McDonald House
- Ghar - Sant Ishwar Foundation

We share details of our community programs on the Move the Chain website.

Fibrolamellar Cancer Foundation

American Red Cross

Folds of Honor

Girls Who Code

Ronald McDonald House

Ghar

SitusAMC

Responsible Business Practices

Responsible Business Practices

At SitusAMC, we are committed to responsible business practices that prioritize integrity, sustainability, and long-term value for our stakeholders.

SitusAMC's approach to responsible business practices is rooted in strong governance, ethical decision-making, and a steadfast dedication to environmental and social stewardship. We integrate sustainability considerations into our operations, risk management, and stakeholder engagement strategies to ensure long-term value creation. By fostering a culture of compliance, inclusivity, and continuous improvement, we aim to uphold the highest standards of corporate responsibility while contributing positively to the communities and markets we serve.

[2-23] SitusAMC is a signatory to the UNGC and is committed to upholding the 10 principles that address human rights, labor, environment, and anti-corruption.

We expect our suppliers, investments, and business partners to hold the same human rights and environmental sustainability standards as SitusAMC; sustainability due diligence is performed on new suppliers and acquisitions before engagement.

Ethics & Compliance

SitusAMC operates in full alignment with all applicable laws and regulations relevant to our global footprint and industry. We maintain a forward-looking approach by closely monitoring regulatory developments that may impact our clients and operations, enabling us to anticipate emerging trends and risks.

Our day-to-day operations are guided by a comprehensive compliance framework, anchored by the SitusAMC Code of Conduct, which upholds the highest standards of integrity in all interactions with clients, partners, and colleagues. In support of UN Sustainable Development Goal 16, we are committed to combating bribery and corruption in all forms. We actively monitor employee interactions with public officials and track any instances involving bribery requests or offers.

> "AN EFFECTIVE AND ROBUST CONFLICT OF INTEREST MANAGEMENT PROCESS ENSURES TRANSPARENCY AND FAIR TREATMENT OF ALL OUR COUNTERPARTIES, AND INCREASES CONFIDENCE OF OUR CLIENTS IN SITUSAMC'S ABILITY TO PROVIDE THEM WITH THE HIGHEST STANDARD OF SERVICE."

Simon Caille
Global Head of Compliance

The Compliance Department provides regular reports detailing incidents, complaints, and regulatory matters. [205-1] In 2024, under our Risk Management and Governance Framework, we refreshed the corruption-related risks assessment of 26 operational units—representing 42% of our business—with no significant risks identified. In 2025, we are updating our controls and adding additional operational units within the risk assessment scope.

To reinforce our ethical standards, all employees, including executive leadership, are required to complete annual anti-corruption training. In 2024, 4,696 employees, including our CEO, successfully completed this training.

Our anti-corruption policies and procedures have been communicated to 1,726 business partners to date (for example clients and suppliers)

[205-2] Business partners that the organization's anti-corruption policies and procedures have been communicated to, by type and region

	Europe	India	US	Total
Number of partners	40	45	1,641	1,726
Percent	2.32%	2.61%	95.08%	100%

Responsible Business Practices (cont.)

Internal Audit

In 2024, SitusAMC established its Global Internal Audit function to further strengthen oversight and risk management across the organization. The team adopted an Internal Audit Charter, affirming its independent reporting relationship to the Risk Committee of the Board of Directors. Foundational governance materials were developed in alignment with the Institute of Internal Auditors' Global Internal Audit Standards. The function conducted its inaugural enterprise-wide internal audit risk assessment, developed a three-year audit plan, and completed four internal audit engagements, including a review of the External Complaints Handling process. Thirteen audits are planned for 2025 as the function continues to mature and support the organization's commitment to integrity and accountability.

❝

"THE ESTABLISHMENT OF OUR GLOBAL INTERNAL AUDIT FUNCTION IN 2024 REINFORCES SITUSAMC'S COMMITMENT TO INTEGRITY, ACCOUNTABILITY, AND PROACTIVE RISK MANAGEMENT ACROSS THE ENTERPRISE."

John Reilly
Senior Director, Internal Audit

Tax

[207-1] [207-2] [207-3] As part of our broader commitment to corporate responsibility, SitusAMC ensures full compliance with all applicable tax regulations across federal, state, and international jurisdictions. To maintain the highest standards of accuracy and transparency, we engage Grant Thornton, a third-party professional services firm, to calculate our tax liabilities and file returns on our behalf.

Oversight of our tax-related activities is conducted by the Chief Accounting Officer and Chief Financial Officer, in collaboration with corporate and segment controllers. This team regularly reviews our tax exposures and obligations, and monitors for changes in our tax profile or regulatory requirements. In 2024, we further strengthened our internal controls by appointing a full-time Tax Director to enhance our internal review processes.

We maintain open and cooperative relationships with tax authorities, ensuring timely and accurate filings and addressing any clarifications as needed. In addition to preparing our tax returns, Grant Thornton also serves as our external auditor, supporting the integrity of our financial disclosures, including tax-related matters. Our tax estimates and effective tax rates are reported to investors on a regular basis, reinforcing our commitment to financial transparency and accountability.

Conflicts of Interest

[2-15] [2-16] An effective and robust conflict of interest management process ensures transparency and fair treatment of all our counterparties, and increases confidence of our client in SitusAMC's ability to provide them with the highest standard of service.

In 2024, the Compliance department has performed more than 35 assessments of risk of conflict of interests, covering over 220 transactions, none of them leading to the set up of dedicated information barriers.

Our Policies & Processes

[2-24] SitusAMC integrates its policy commitments across all business functions to ensure consistent adherence to ethical, legal, and operational standards. These policies apply to all employees as they perform their daily responsibilities and engage with suppliers, clients, and third-party partners. Key governance documents—such as our Modern Slavery Statement and Vendor Code of Conduct—are publicly accessible on our website, while our Ethics Pack is regularly shared with clients to support transparency and ongoing compliance.

Our core policies address areas such as ethics and business conduct, labor and human rights, environmental responsibility, and other topics relevant to our industry. These policies are aligned with our commitment to the United Nations Sustainable Development Goals (SDGs).

Each policy is assigned a designated owner and is subject to regular review and updates. Final approval is provided by the Chief Administrative Officer (CAO) and other relevant members of the Executive Leadership Team. All material governance policies are referenced in the Employee Handbook, which employees are required to acknowledge and sign annually.

Responsible Business Practices (cont.)

Identifying & Raising Concerns

[2-25] SitusAMC has not identified any significant adverse impacts on the environment, individuals, or the communities in which it operates. As part of our due diligence process, we assess potential risks within our supply chain prior to vendor onboarding. Based on the vendor's risk profile, we determine the appropriateness of engagement to ensure alignment with our ethical and operational standards.

We maintain structured grievance mechanisms to address concerns across various domains. Depending on the nature of the issue, grievances are escalated through designated channels, including Human Resources, Compliance, or Corporate Sustainability teams. Additionally, we provide a confidential whistleblowing hotline that allows employees to report concerns anonymously.

Our grievance framework is developed collaboratively by the Compliance, Information Security, Legal, and HR departments. Its effectiveness is regularly evaluated through employee exit interviews and client feedback surveys. Any concerns raised outside of these formal reviews are promptly escalated to the Compliance team for investigation and appropriate action.

[2-26] [2-16] SitusAMC's Code of Conduct, outlined in the Employee Handbook, defines the standards of responsible business behavior expected from all employees. To support accountability and transparency, employees are encouraged to report concerns related to business conduct through multiple channels, including an anonymous whistleblowing hotline and direct access to the Compliance, Human Resources, ESG, or Legal departments. Each organizational policy clearly identifies the appropriate point of contact for raising concerns. External stakeholders may also report concerns anonymously via the

whistleblowing hotline, which is supported by a publicly available Complaints Policy on our website. A formal escalation process is in place for addressing critical concerns, which are elevated to the Board of Directors by the CEO or the Chief Administrative Officer/General Counsel, as appropriate. Notably, no critical concerns were reported during the 2024 reporting period.

Information Security

At SitusAMC, information security is a core component of our Corporate Sustainability strategy and a fundamental driver of stakeholder trust. In 2024, we continued to advance our cybersecurity framework to safeguard our systems, data, and personnel amid an increasingly complex digital landscape.

Under the leadership of our Chief Information Security Officer (CISO), we made significant progress in aligning our security initiatives with our broader sustainability objectives. Key investments were directed toward enhancing threat detection capabilities, strengthening cloud security infrastructure, and improving identity and access management protocols. We also expanded our Security Operations function, implemented real-time monitoring enhancements, and bolstered our team with experienced cybersecurity professionals to further reinforce our resilience and readiness.

[418-1] The organization has not experienced any substantiated complaints related to breach of customer privacy for the past year.

Cybersecurity Governance and Resilience

In 2024, SitusAMC enhanced its cybersecurity governance by deepening board-level engagement and embedding risk awareness across all levels of the organization. Through targeted training programs, phishing simulations, and executive-level cyber briefings, we fostered a strong, security-conscious culture throughout the company.

"IN 2024, SITUSAMC REINFORCED ITS COMMITMENT TO CYBERSECURITY AS A CORE COMPONENT OF ITS CORPORATE SUSTAINABILITY STRATEGY, ENHANCING THREAT DETECTION CONTROLS, CLOUD SECURITY, AND IDENTITY MANAGEMENT. THE COMPANY STRENGTHENED ITS SECURITY OPERATIONS, EXPANDED REAL-TIME MONITORING, AND ONBOARDED EXPERIENCED PROFESSIONALS. LOOKING AHEAD, SITUSAMC REMAINS FOCUSED ON PROACTIVE RISK MANAGEMENT, RESPONSIBLE AI USE, AND SUSTAINING A SECURITY-FIRST MINDSET TO UPHOLD STAKEHOLDER TRUST AND LONG-TERM RESILIENCE."

Kevin Patel
CISO

Responsible Business Practices (cont.)

As part of our commitment to transparency and continuous improvement, we have aligned our cybersecurity controls with updated global standards, including NIST Cybersecurity Framework (CSF) 2.0 and ISO/IEC 27001:2022. We also have strengthened oversight of third-party risks to ensure comprehensive protection across our digital ecosystem.

Looking ahead, we remain focused on proactive risk management, responsible AI adoption, and continued investment in innovative technologies. Cyber resilience is a critical pillar of our long-term sustainability strategy, and we are committed to safeguarding the trust placed in us by our employees, clients, partners, and shareholders. We recognize that maintaining a secure environment is an ongoing journey—one that demands vigilance, collaboration, and continuous advancement.

Responsible Procurement
At SitusAMC, we are committed to fostering sustainability and transparency throughout our supply chain, recognizing the long-term value this brings to our business, clients, and communities. Our publicly available Vendor Code of Conduct outlines the expectations we have for all vendors providing goods and services to our organization.

Sustainability considerations are integrated into our supplier risk assessment, due diligence, and selection processes to ensure alignment with our environmental and social objectives. Through our Vendor Risk Management Program, we prioritize oversight of outsourced services that could significantly impact our operations or clients, particularly those involving sensitive data or posing material compliance, reputational, strategic, or IT-related risks.

[308-1] [308-2] [409-1] [414-1] [414-2]We apply a risk-based approach to supplier evaluations, with heightened scrutiny for high-risk vendors. In 2024, all new vendors with annual expenditures exceeding USD 1 million underwent environmental and social screening.

The total number of vendors reviewed was 248; none were found to have significant actual or potential adverse environmental, social, or forced or compulsory labor impacts. [308-1] The only vendors who did not undergo the assessment process were vendors, where a client instructed us to hire a specific supplier.

> "A RESPONSIBLE SUPPLY CHAIN IS A FOUNDATIONAL ELEMENT OF OUR SUPPLIER CODE OF CONDUCT. WE COLLABORATE CLOSELY WITH OUR SUPPLIERS TO DRIVE COLLECTIVE IMPACT, WITH A STRONG FOCUS ON ETHICAL BUSINESS PRACTICES, HUMAN RIGHTS PROTECTION, ENVIRONMENTAL SUSTAINABILITY, AND CONTINUOUS IMPROVEMENT"

Tim Traywick
Director, Supply Chain Management

EcoVadis Sustainability Rating
The EcoVadis rating is a globally recognized approach, with ratings based on a firm's environmental impact, including carbon emissions, human rights, labor practices, ethical business conduct, and approach to sustainable procurement. To date, EcoVadis has provided ratings on more than 130,000 companies

At SitusAMC, we are proud to share the continued recognition of our sustainability efforts through our EcoVadis ratings journey. In 2022, we embarked on our first formal sustainability assessment and were awarded a Bronze rating by EcoVadis—an important milestone that marked the beginning of our structured sustainability journey
Building on that foundation, we were honored to receive a Silver Sustainability Rating in May 2023.

We are especially proud to have maintained this Silver rating in 2024, reinforcing our commitment to continuous improvement and responsible business practices. This recognition reflects the dedication of our teams across the organizations who work diligently to integrate sustainability into our operations, culture, and strategic decision-making.

SitusAMC

About the Report

About the Report

Report Scope

[2-1] This Corporate Responsibility Report covers the period from January to December 2024 for all subsidiaries of SitusAMC Holdings Corporation. It has been prepared with reference to the Global Reporting Initiative (GRI) Standards.

This report provides information about our environmental, social, and governance (ESG) performance. The scope of this report encompasses our operations, products, and services, as well as their impacts on stakeholders and the environment. We are sharing disclosures on our approach to sustainability, including our strategies, policies, and management systems. We also provide quantitative data and qualitative information to illustrate our performance and progress.

We have prepared this report with reference to the Global Reporting Initiative (GRI) Standards. Using the GRI Standards framework for reporting, we demonstrate our commitment to responsible business practices. We believe that transparent and credible reporting is essential for building trust with our stakeholders and driving continuous improvement in our sustainability efforts.

Understanding the Material Issues

[3-1] At SitusAMC, we recognize that understanding the issues most relevant to our business and stakeholders is essential to shaping an effective and responsive sustainability strategy. The assessment of our material issues approach enables us to focus on the topics that matter most—both to our stakeholders and to our long-term business performance.

Our most recent assessment review, incorporated a comprehensive evaluation of stakeholder inputs, including:

- Increasing client requests and feedback from annual service questionnaires,
- Insights from employee engagement surveys,
- Evolving regulatory requirements, and
- Emerging trends within the financial services sector.

This process engaged a broad group of internal and external stakeholders, including our Executive Leadership Team (ELT), key clients, legal advisors, and employees.

[3-2] As a result, we identified eight core focus areas across the pillars of environmental, social, and governance (ESG). These areas now form the foundation of our sustainability strategy and reporting framework. By aligning our efforts with stakeholder expectations, we ensure that our initiatives remain transparent, relevant, and impactful.

Looking ahead, we plan to conduct an updated materiality assessment in advance of the 2025 reporting cycle, further strengthening our alignment with stakeholder priorities and global sustainability standards.

	Our Customers	Our Business	Our Suppliers
Environmental			
Energy consumption	Medium	High	Medium
Emissions	High	High	High
Net Zero commitment	Medium	Medium	Medium
Social			
Employee attraction and retention	Medium	High	Low
Employee learning and development	Low	Medium	Low
Governance			
Business ethics and integrity	High	High	High
Supply chain sustainability	High	High	High
Regulatory change monitoring	High	High	Medium

About the Report (cont.)

Stakeholder Engagement

[2-29] At SitusAMC, we recognize that sustainable growth is driven by meaningful engagement with our key stakeholders. In 2024, we continue to adopt a multi-stakeholder approach, with a primary focus on two core groups: clients and employees.

To ensure we consistently deliver value to our clients, we conduct regular client satisfaction surveys. These insights help us assess our performance, identify areas for improvement, and uncover new opportunities for growth. We maintain open and transparent communication through dedicated account management, client support channels, our corporate website, marketing communications, and our expanding podcast series.

Our commitment to employee engagement is equally strong. Through our annual employee survey, we gather feedback across a range of workplace dimensions, including well-being, inclusion, and professional development. These insights inform our people strategies and help us foster a culture of continuous improvement and shared success. Findings are shared with the executive leadership, and, where needed, action plans can be implemented.

SitusAMC

Further Information

Further Information

[2-3] Questions related to this report or the ESG information it contains should contact the Senior Director, Corporate Sustainability at corporatesustainability@situsamc.com

See also www.situsamc.com.

SitusAMC

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 2: General Disclosures	2-1 Organizational details	SitusAMC Holdings Corporation The company operates as a corporation, with ownership structured through shares issued to shareholders.	Index		
	2-2 Entities included in the organization's sustainability reporting	No adjustments have been made for minority interests. SitusAMC conducts due diligence, taking environmental and social factors into consideration before an acquisition. The suppliers of the incoming entities are also reviewed as part of the due diligence on the incoming entity. Material topics remain consistent for acquisitions/disposals as they are in the same industry.	About this report		
	2-3 Reporting period, frequency and contact point		About this report		
	2-4 Restatements of information	There are no restatements of information.	Index		
	2-5 External assurance	This report has not undergone external assurance.	Index		
	2-6 Activities, value chain, and other business relationships	SitusAMC is active in commercial and residential real estate in the US and commercial real estate in Europe. Within our supply chain, technology providers represent our largest proposition of vendors. There are no significant changes compared to the previous reporting period.	Our business		

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 2: General Disclosures (continued)	2-7 Employees		Our people		SDG 8 SDG 10
	2-8 Workers who are not employees	We do not currently have any workers who are not employees.	Index		
	2-9 Governance structure and composition		Governance		
	2-10 Nomination and selection of the highest governance body		Governance		
	2-11 Chair of the highest governance body	The partnership agreement governing the management of the highest governance body does not foresee the position of chairman among the designated managers.	Governance		
	2-12 Role of the highest governance body in overseeing the management of impacts		Governance		
	2-13 Delegation of responsibility for managing impacts		Governance		
	2-14 Role of the highest governance body in sustainability reporting		Governance		
	2-15 Conflicts of interest		Responsible business practices		
	2-16 Communication of critical concerns		Responsible business practices		
	2-17 Collective knowledge of the highest governance body		Governance		
	2-18 Evaluation of the performance of the highest governance body		Governance		

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 2: General Disclosures (continued)	2-19 Remuneration policies		Governance		
	2-20 Process to determine remuneration		Governance		
	2-21 Annual total compensation ratio	As a privately owned organization, we believe this information to be confidential. Also given the countries we operate in; we believe the total compensation ratio to be fair.	Index		
	2-22 Statement on sustainable development strategy		CEO welcome		
	2-23 Policy commitments		Responsible business practices		
	2-24 Embedding policy commitments		Responsible business practices		
	2-25 Processes to remediate negative impacts		Responsible business practices		
	2-26 Mechanisms for seeking advice and raising concerns		Responsible business practices		
	2-27 Compliance with laws and regulations	We have not experienced significant non-compliance with laws during the reporting year.	Index		
	2-28 Membership associations		Our business		
	2-29 Approach to stakeholder engagement		About this report		
	2-30 Collective bargaining agreements	No employees are covered by collective bargaining agreements.	Index	Principle 3	SDG 8
GRI 3: Material Topics	3-1 Process to determine material topics		About this report		
	3-2 List of material topics	Make the changes and add the table.	About this report		
	3-3 Management of material topics	SitusAMC has not reported any negative impacts through its activities or as a result of its business relationships.	Index		

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 201: Economic Performance	201-1 Direct economic value generated and distributed				
	201-2 Financial implications and other risks and opportunities due to climate change		Environmental performance	Principle 7	
	201-3 Defined benefit plan obligations and other retirement plans	US: No pension plan benefit is offered; therefore, no pension liability exists. The 401(k) plan offers a discretionary match of 100% on the first 2% plus 50% on the next 2%. Europe: pension plan is a defined contribution plan, therefore there are no liabilities to the company. As an employer, we contribute 10% of the gross salary for UK and Ireland employees. All employees in the UK and Ireland are in the pension scheme. No pension scheme is offered by the company in Germany. India: A state-funded pension plan exists for employees who earn less than INR 15,000. There is no employer contribution.	Index		
	201-4 Financial assistance received from government	None.	Index		
GRI 202: Market Presence	202-1 Ratios of standard entry level wage by gender compared to local minimum wage		Our people		SDG 8
GRI 204: Procurement Practices	204-1 Proportion of spending on local suppliers	We do not currently report on this data.	Index		SDG 10
GRI 205: Anti-corruption 2016	205-1 Operations assessed for risks related to corruption		Responsible business practices	Principle 10	SDG 16
	205-2 Communication and training about anti-corruption policies and procedures		Responsible business practices	Principle 10	SDG 16
	205-3 Confirmed incidents of corruption and actions taken	No incidents of corruption were identified in the reporting year.	Index	Principle 10	SDG 16
GRI 206: Anti-competitive Behavior 2016	206-1 Legal actions for anti-competitive behavior, anti-trust, and monopoly practices	No incidents of anti-competitive behavior were identified in the reporting year.	Index	Principle 10	SDG 16

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 207: Tax 2019	207-1 Approach to tax		Responsible business practices		
	207-2 Tax governance, control, and risk management		Responsible business practices		
	207-3 Stakeholder engagement and management of concerns related to tax		Responsible business practices		
GRI 302: Energy 2016	302-1 Energy consumption within the organization	Emissions factors applied: BEIS, IEA, EPA, GHG Protocol Additional information: CBECS 2018	Environmental performance	Principle 8	SDG 12 SDG 13
	302-2 Energy consumption outside of the organization		Environmental performance	Principle 8	SDG 12 SDG 13
	302-3 Energy intensity		Environmental performance		
	302-4 Reduction of energy consumption		Environmental performance	Principle 8	SDG 13
GRI 303: Water and Effluents 2018	303-5 Water consumption	Working with landlord/subset/don't have it all.	Environmental performance	Principle 8	SDG 12
GRI 305: Emissions 2016	305-1 Direct (Scope 1) GHG emissions	Emissions factors applied: BEIS, IEA, EPA, GHG Additional information: CBECS 2018 AR5 Global-Warming-Potential-Values (Feb 16, 2016)	Index	Principle 8	SDG 13
	305-2 Energy indirect (Scope 2) GHG emissions		Index	Principle 8	SDG 13
	305-3 Other indirect (Scope 3) GHG emissions		Index	Principle 8	SDG 13
	305-4 GHG emissions intensity		Environmental performance	Principle 8	SDG 13
	305-5 Reduction of GHG emissions		Environmental performance	Principle 8	SDG 13

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 306: Waste 2020	306-1 Waste generation and significant waste-related impacts		Environmental performance	Principle 8	SDG 12
	306-2 Management of significant waste-related impacts		Environmental performance	Principle 8	SDG 12
	306-3 Waste generated	This includes information from several of our offices located in the US, India, and London office.	Environmental performance	Principle 8	SDG 12
GRI 308: Supplier Environmental Assessment 2016	308-1 New suppliers that were screened using environmental criteria		Responsible business practices	Principle 7 Principle 8	SDG 10 SDG 12
	308-2 Negative environmental impacts in the supply chain and actions taken		Responsible business practices	Principle 7 Principle 8	SDG 10 SDG 12
GRI 401: Employment 2016	401-1 New employee hires and employee turnover		Our people		
	401-2 Benefits provided to full-time employees that are not provided to temporary or part-time employees		Our people		
	401-3 Parental leave		Our people	Principle 1	SDG 10
GRI 402: Labor/Management Relations 2016	402-1 Minimum notice periods regarding operational changes	We abide by all the regulatory requirements of the local states that we operate in.	Index	Principle 1	
GRI 403: Occupational Health and Safety 2018	403-1 Occupational health and safety management system		Our people	Principle 1	SDG 8
	403-2 Hazard identification, risk assessment, and incident investigation		Our people	Principle 1	SDG 8
	403-3 Occupational health services	The organization mitigates risk through a preventative approach, following the required Health and Safety regulations by region and with input from Facilities and Human Resources.	Index	Principle 1	SDG 8
	403-4 Worker participation, consultation, and communication on occupational health and safety		Our people	Principle 1	SDG 8

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 403: Occupational Health and Safety 2018 (continued)	403-5 Worker training on occupational health and safety		Our people	Principle 1	SDG 8
	403-6 Promotion of worker health		Our people	Principle 1	SDG 8
	403-7 Prevention and mitigation of occupational health and safety impacts directly linked by business relationships		Our people	Principle 1	SDG 8
	403-8 Workers covered by an occupational health and safety management system	We do not maintain an external audit certification for health and safety. Onsite contractors are advised of our health and safety policy, and they are also advised to work under their own policy requirements.	Index	Principle 1	SDG 8
	403-9 Work-related injuries	There were no fatalities, high-consequence work-related injuries, or recordable work-related injuries recorded during the reporting year. The US reported 4,152,181.95 working hours in 2023. Working hours data was not available for other locations.	Index	Principle 1	SDG 8
	403-10 Work-related ill health	One instance of work-related ill health was recorded during the reporting year, related to a slip or fall. No other incidents were reported.	Index	Principle 1	SDG 8
GRI 404: Training and Education 2016	404-1 Average hours of training per year per employee		Our people		SDG 8 SDG 10
	404-2 Programs for upgrading employee skills and transition assistance programs		Our people		SDG 8
	404-3 Percentage of employees receiving regular performance and career development reviews		Our people		SDG 10
GRI 406: Non-discrimination 2016	406-1 Incidents of discrimination and corrective actions taken	Zero incidents of discrimination were reported globally.	Index	Principle 6	SDG 10

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GRI Standard	Disclosure	Note	Location	UNGC linkage	SDG linkage
GRI 407: Freedom of Association and Collective Bargaining 2016	407-1 Operations and suppliers in which the right to freedom of association and collective bargaining may be at risk	None were found to be at significant risk. The company operates in professional offices in the professional financial services sector in the United States, India, the UK, and the EU. In the United States, it is a legal right to unionize; therefore, this is not identified as a high-risk area of operations. The right to form a Trade Union is guaranteed as a fundamental right under Article 19 (1) (c) of the Indian Constitution. The company does not limit employee's right to exercise their freedom of association and collective bargaining.	Index	Principle 4	SDG 10
GRI 408: Child Labor 2016	408-1 Operations and suppliers at significant risk for incidents of child labor	None.	Index	Principle 1 Principle 5	SDG 3 SDG 8 SDG 16
GRI 409: Forced or Compulsory Labor 2016	409-1 Operations and suppliers at significant risk for incidents of forced or compulsory labor	None.	Index	Principle 1 Principle 4	SDG 3 SDG 8 SDG 16
GRI 413: Local Communities 2016	413-1 Operations with local community engagement, impact assessments, and development programs		Supporting our communities		SDG 10
	413-2 Operations with significant actual and potential negative impacts on local communities	We do not currently operate in any high-risk jurisdiction where our offices potentially negatively impact local communities.	Index		
GRI 414: Supplier Social Assessment 2016	414-1 New suppliers that were screened using social criteria	100%	Responsible business practices	Principle 1 Principle 2 Principle 3 Principle 4 Principle 5 Principle 6	SDG 10 SDG 16
	414-2 Negative social impacts in the supply chain and actions taken	No negative impacts were identified.	Index		
GRI 415: Public Policy 2016	415-1 Political contributions	The organization does not make any financial or in-kind political contributions.	Index		
GRI 418: Customer Privacy 2016	418-1 Substantiated complaints concerning breaches of customer privacy and losses of customer data	None.	Index		

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For further inquiries about SitusAMC's Corporate Sustainability efforts, contact:

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