

Corporate Sustainability Report



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Letter from the CEO

As we navigate a transformative era for our business and the world around us, the pace, scale, and complexity of change have never been greater. Artificial intelligence is becoming embedded in how we operate and innovate, geopolitical shifts continue to shape the global landscape, and expectations of corporate responsibility are rising. In this environment, resilience is a core strategic imperative, extending beyond reactive capability.

Our continued focus on cyber security, evolving our operating models to harness the potential of AI, and our robust supply chain governance positions us not only to withstand transformative disruption but to lead through it with confidence and responsibility.

Our team remains unwavering in our commitment to a sustainable future, and via this report, I am pleased to provide a 2025 update on the commitments we made in our earlier reports, as well as additional areas of impact our company has made.

SitusAMC received EcoVadis Silver rating in 2023 and 2024 and a Bronze rating in 2025. We continue to use EcoVadis to benchmark our progress and identify improvements. While the continued recognition is rewarding, it is the meaningful contributions made for our clients, partners, employees and our communities that I am most proud of. Further details of which, are highlighted, throughout the report.

Our continuing 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.

As we look ahead, we recognize the real and evolving challenges facing meaningful progress in sustainability. Even so, I remain optimistic about the path we are forging together. It is through our collective efforts we can navigate the complexities of a changing world while remaining committed to making steady, credible progress, and doing so in a way that supports resilience, responsibility, and long-term value.

Thank you for your continued support as we work together to shape a more sustainable, resilient, and inclusive future.



Michael Franco
Chief Executive Officer



Welcome

Welcome to SitusAMC's 2025 Corporate Sustainability Report.

I am pleased to present the fourth year of sustainability reporting for SitusAMC. This year's report reflects both the progress we have made and the areas where we continue to challenge ourselves as we strengthen our approach to sustainability across the business.

Supporting the Sustainable Development Goals (SDGs) remains a key ongoing priority for SitusAMC, and we have been making steady progress, some of which are highlighted below:

- SDG 8 – Decent Work and Economic Growth, supported by the growth of our employee resource groups, expansion of our learning and development programs.
- SDG 10 – Reduced Inequalities, through initiatives that support local communities with educational programs, bring more women into the workforce, and contribute to the provision of free healthcare.
- SDG 12 – Responsible Consumption and Production, demonstrated by our transition to renewable energy consumption in some of our largest offices.

Against a backdrop of rapid change, we remain focused on building a sustainable business while upholding our responsibilities to our people, our environment and the communities we serve.

Reporting and Governance

Our ethics training completion and pass rate remained at 100% in 2025, with new modules related to Artificial Intelligence included into the training program. Our third CDP submission showed improvements in several critical areas, including Scope 1&2 emissions, policy and engagement, context and verification. Whilst progress has been made, further attention is required to strengthen our energy strategy.

Our sustainability performance also continued to be recognized externally, in 2025 we achieved a Bronze rating from EcoVadis.

We continued to enhance third-party due diligence and review process for suppliers assessed as having elevated environmental and human rights risks.

People and Environment

Our Going Green community continued to gain momentum. We aim to improve our climate performance against our 2023 baseline by increasing green-certified office footprint to 50% by 2030 and by setting interim emission reduction targets once our net-zero pathway is defined. The Green Advocate series highlighted amazing stories of green initiatives run by our employees. We continue to explore opportunities to increase our use of renewable energy and are pleased to report that recently the Mumbai sourced 100% of its electricity from a utility renewable energy tariff. This applies to grid electricity consumption at that site.

Our employee resource groups remain an important platform for connection, professional development, and knowledge sharing with a mentoring program embedded across the ERGs globally. Our Health and Safety program expanded during the year to incorporate clean air monitoring in our India offices.

Recognizing that leadership must evolve alongside a changing world, we have invested in developing modern leadership capabilities, providing our leaders with insights and tools to support both essential and emerging skills.

Communities

Community investment continues to be driven by employee engagement and local relevance. In 2025, we established a Corporate Social Responsibility committee in India, empowering employees to direct our charitable funds

towards causes aligned with local needs. Feedback from employees and partner organizations demonstrated strong engagement and positive social impact.

Challenges and the Future

The sustainability landscape in 2025 was shared by geopolitical uncertainty, regulatory divergence, and shifting priorities across global markets. While policy and regulatory frameworks increasingly varied by region, the broader direction of travel towards greater accountability remained clear.

Looking ahead, 2026 represents a continuation and intensification of these trends. The defining challenge is not the absence of progress but navigating a changing and uneven global environment. As a company with both a global footprint and a global client base, our focus will be on adapting to fragmentation while remaining aligned to our values and long-term sustainability objectives.



Sehr Aziz
Corporate Sustainability Head



2025 At A Glance

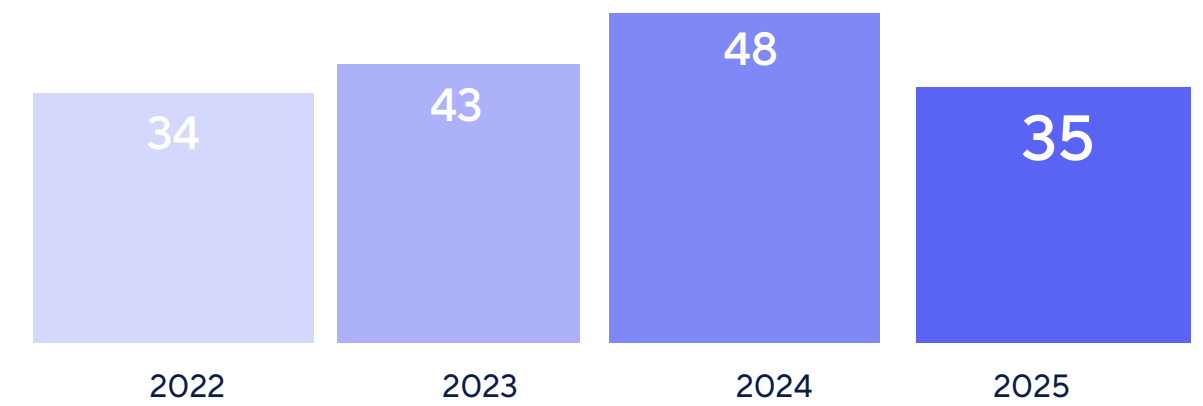
EcoVadis



Emission Intensity in tCO2e (Per full-time employee)



Office Footprint in Green Certified Buildings (in %)

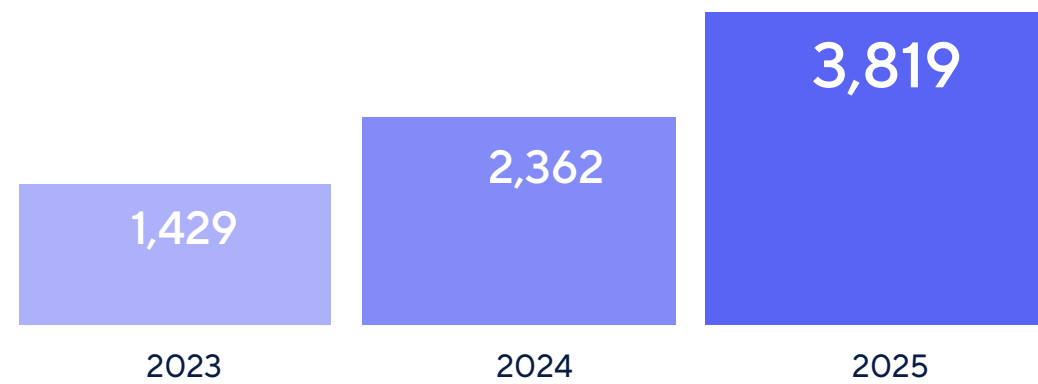


CDP

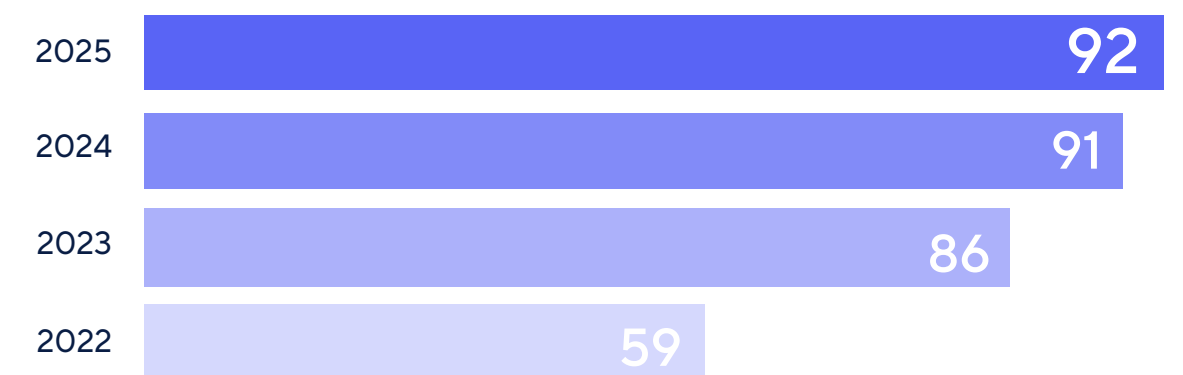


D 2023 C 2024 C 2025

Volunteering (in hours)



Voice of Employee Survey Participation (in %)



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

1,500+ Clients

Our Values

At SitusAMC, our values serve as the foundation for how we engage with colleagues, clients and Partners. They are:

Be Yourself

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

Advocate For Others

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

Dream Big

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

Stay Nimble

Things change. Be open and ready to adapt.

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.

Own Every Outcome

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

These guiding principles shape our actions and decisions, ensuring that we create a positive impact together.



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



EcoVadis



GlobeSt.



HousingWire



Oktopost



Honorable Mention

Our Sustainability Priorities



Our Sustainability Priorities

Advancing the Sustainable Development Goals (SDGs) remains a core priority for us, and we continue to make steady, measurable progress. At the same time, ongoing engagement with our stakeholders via their regular assessments enables us to understand their material issues and align our efforts closely with what matters most to them.

SUSTAINABLE DEVELOPMENT GOAL	OUR ACTIVITY	OUR AMBITION	PROGRESS
SDG 7 Affordable and Clean Energy	Disclose % of electricity from renewable sources across our offices and publish time-bound targets once procurement options and baselines finalized.	50% of our total office footprint to be residing in green certified buildings by 2030	In Progress
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 supports our integrity, accountability, and long-term value creation. Our governance framework is underpinned by robust policies, controls, and oversight mechanisms that promote ethical conduct, transparency, and compliance across the organization.

Our governance posture is actively reviewed and enhanced to remain responsive to a rapidly evolving operating environment. This includes addressing emerging risks associated with technological developments such as artificial intelligence, data management, and business continuity, ensuring risks are appropriately identified, managed, and controlled.

The SitusAMC Board and Executive Leadership Team provide effective 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 organizations' 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 who play a key role in applying controls and upholding our standards of integrity. Through ongoing training, and clear accountability, our people help ensure governance principles are constantly translated into day-to-day actions that support resilience, trust and sustainable growth.



Lisa Wallace
Executive Managing Director,
General Counsel

[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 organization's strategic direction.

The Board comprises 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 in topics related to corporate sustainability through activities such as client audits, surveys, resource groups, town hall meetings, and the employee engagement app.

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 to the company wide. 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 GP Board	7	15
Executive Leadership Team	6	100
Risk Committee	12	50
Compensation Committee	5	40
Artificial Intelligence (AI) Committee	17	35



Ownership & Accountability

[2-13] [2-14] The Board oversees sustainability governance and delegates operational responsibility to the Executive Leadership Team (ELT) through the CEO. The sustainability strategy is implemented by the Head of Corporate Sustainability, working in collaboration with functional leaders and reporting to the Chief Administration Officer (CAO). This role provides regular updates and recommendations to support Board decision-making, including the allocation of resources for sustainable initiatives.

The Board reviews the progress of sustainability-related activities on a quarterly basis through the Board pack. Performance is assessed using internal audit outcomes and external sustainability assessments, including EcoVadis and CDP ratings. The ELT reviews and approves the organization's annual alignment with the Sustainable Development Goals (SDGs). Sustainability disclosures are subject to internal review to ensure consistency and accuracy, with oversight provided by the Head of Corporate Sustainability and validation by relevant functional leaders.

[2-18] The performance of the ELT is evaluated annually as part of the organization's overall performance review. This evaluation is based on a corporate scorecard covering strategic delivery, governance and controls, people, and technology. Progress against the scorecard is reviewed quarterly, supported by independent audits and assessments. Identified improvement actions are tracked, discussed by the ELT, and reported to the Board.



Environment



Environment

At SitusAMC, we embed sustainability considerations across our activities, systems, and partnerships to responsibly manage environmental impacts while delivering value to our stakeholders. Our approach emphasizes the practical integration of environmental principles into everyday operations, governance, and the broader value chain.

Our environmental sustainability strategy focuses on optimizing resource use, improving energy efficiency, increasing the adoption of renewable energy where feasible, and supporting sustainable building design and operations. We work collaboratively with internal teams and external partners to implement effective, scalable solutions that reduce environmental impacts and enhance resilience across the assets and services we support.

These efforts contribute directly to global sustainability priorities and align with the United Nations Sustainable Development Goals (SDGs), including [Affordable and Clean Energy \(SDG 7\)](#); [Sustainable Cities and Communities \(SDG 11\)](#); [Responsible Consumption and Production \(SDG 12\)](#); and [Climate Action \(SDG 13\)](#).



“Our environmental approach is focused on **strengthening operational efficiency, improving data quality, and reducing environmental impacts across our activities.** During the reporting period, we advanced targeted initiatives related to energy management, emissions monitoring, and resource use, in line with evolving regulatory expectations and our long-term sustainability objectives. While progress is ongoing, these efforts reflect our commitment to integrating environmental considerations into decision-making and establishing a robust foundation for continuous improvement in our environmental performance.”



Maghna Tyagi
Assistant Manager,
Corporate Sustainability



GHG Emission

In 2025, we prioritized strengthening the accuracy, completeness, and reliability of our greenhouse gas (GHG) emissions data. Our efforts focused on enhancing data collection methodologies, improving internal controls, and expanding the scope of emissions included within our reporting boundaries. These actions have enabled more consistent, transparent, and useful insights compared to prior years.

Building a robust emissions data foundation is a critical step in advancing our long-term environmental strategy. Looking ahead, we will continue to refine our data management processes, deepen visibility into our indirect (Scope 3) emissions, and enhance alignment with recognized reporting frameworks and best practices. Improved data quality will support more informed assessment of material emissions sources across our value chain and enable the identification of targeted, data driven opportunities to manage and, over time, reduce emissions. These efforts aim to support ongoing performance improvement, greater transparency, and future goalsetting as our sustainability program continues to mature.

Organizational Boundaries

SitusAMC organizational boundaries for emission reporting are 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.

SCOPE 1

Combustion and Refrigerant emissions tied to our leased offices and data centres.

SCOPE 2

Electricity and natural gas consumed by us in leased office spaces, Shared building utilities managed by our landlords.

SCOPE 3

Business travel 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 accounting to 78.4% of our total scope emissions play a crucial role in our total carbon footprint, largely resulting from employee commuting, i.e. 53.6% and 12.9% 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 correlated 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.

GHG Inventory in Metric Tons of Carbon Dioxide Equivalent (MT CO2e)

Emissions (mtCO2 e)	2023	2024*	2025
[305-1] Scope 1	133.76	47.7	42
[305-2] Scope 2 (Location Based)		1,575.6	1,518.2
[305-2] Scope 2 (Market Based)	1,142.92	1,315	1,356.9
[305-3] Scope 3: Total	524.67	5,711.9	5,067.6
Scope 3.1: Purchased goods and services	9.71	33.5	197.5
Scope 3.3: Fuel and energy related activities	6.66	490.8	473.6
Scope 3.5: Waste	296.3	21.3	8.2
Scope 3.6: Business Travel	212	1,027.8	837.1
Scope 3.7: Employee Commuting		3,952.6	3,468.4
Scope 3.8 Upstream leased assets		185.8	82.8
Total Emission (Scope 1+Scope 2 (Location Based)+Scope 3.		7,335.2	6,627.7
Total Emission (Scope 1+Scope 2 (Market Based) +Scope 3.	1,801.35	7,074.6	6,466.4

*Emissions for year 2024 were recalculated following a methodology update to improve data accuracy and consistency; this change reflects methodological refinement rather than a material change in underlying emissions.



GHG Emission (cont.)

Emission Intensity

Our emission intensity, based on the Full-Time Workforce (FTW) metric, has increased to 0.301 tCO₂e/FTE. The increase in emissions intensity per full-time equivalent employee during the reporting period is primarily attributable to a reduction in employee headcount, while absolute emissions remained largely stable. As emissions from relatively fixed operational activities, such as office energy consumption, did not decrease proportionally with changes in workforce size, emissions intensity per FTE increased. The increase reflects changes in the calculation denominator rather than higher underlying emissions.

In 2025, we continued to advance our climate strategy through the execution of a comprehensive carbon footprint assessment across our major global locations, leveraging Novata, our sustainability data management platform. This work builds on our earlier assessments and has strengthened our ability to consistently measure, manage, and interpret greenhouse gas (GHG) emissions data. The enhanced visibility has allowed us to identify material emissions sources and integrate emissions considerations into decision-making and prioritization of action.

Emission Reduction Efforts

Our emissions profile confirms that 52.3% of Scope 3 emissions are attributable to employee commuting and 12.6% business travel. In response, we have already taken steps to establish systems and processes to manage Scope 3 impacts more effectively over time. Employee transportation in India, particularly contracted cab services, has been identified as a priority focus area for emissions reduction. We assessed the feasibility of integrating electric vehicles into our employee commute services, based on current office locations and typical travel distances, implementation is not presently viable. We continue to actively monitor and evaluate lower emission transportation solutions as part of our ongoing efforts to reduce transportation related to greenhouse gas emissions. In parallel, we have taken practical steps to reduce emissions within our existing transportation framework. This includes increased use of shared cab services, maximizing vehicle occupancy, and optimizing routes to reduce per-employee emissions. We continue to monitor advancements in lower emission transportation solutions and engage with service providers to assess feasible options over time, as part of our ongoing commitment to reducing our transportation related environmental footprint.

[305-5] We have also continued our collaboration with landlords to support energyefficient building performance improvements and, where appropriate, transitions to more sustainable leased spaces. These actions reinforce our broader commitment to responsible energy use, which is already integrated into workspace design, site selection, and resource management practices across our portfolio.

Reducing our operational footprint remains an established practice across the organization. Our cloud-based operating model enables a paperless environment in most offices, supporting our commitment to minimal paper usage. We actively encourage digital efficiency by promoting shared links over email attachments, reducing storage demands, and associated carbon impacts from digital communications.

Sustainable procurement practices are also in place and continue to be strengthened. Wherever feasible, we source recycled materials for office, kitchen, and restroom use. These actions are supported by our “Going Green” campaign, which in 2025 continued to expand recycling programs and phase out single use plastics across locations.

In parallel, we have continued to strengthen our emissions reporting capabilities. Since initiating emissions assessments in 2022, we have made meaningful progress in improving data coverage and consistency, though challenges remain in shared facilities and locations managed by smaller institutional landlords. To ensure comparability and tracking accuracy, 2023 has been established as our baseline year for emissions measurement [305-1]. From this foundation, we are continuously refining our data collection framework to enhance transparency and support sustained emissions management.



GHG Emission (cont.)

Energy Management

In 2025, our energy reporting reflected established practices for tracking and estimating electricity consumption across our office footprint. Direct electricity consumption data was available for approximately 61.54% of our offices. For an additional 15.38%, we applied Commercial Buildings Energy Consumption Survey (CBECS) benchmarking estimates, allowing us to account for a combined total of approximately 76.92% of our occupied office space.

Our energy consumption data is primarily derived from information provided by landlords across locations in the United States, United Kingdom, and India. For independently leased offices where SitusAMC is the sole occupant, electricity consumption is calculated using actual utility data. In multi-tenant buildings, where direct utility data is not always available, we apply established estimation methodologies that combine available submetering data with recognized industry benchmarks, including CBECS. These estimates are guided by our space utilization (square footage) model and building-level end-use benchmarks, ensuring consistency across locations.

[302-1] Total recorded fuel consumption for 2025 includes electricity and heating data from locations where this information is accessible. However, detailed disaggregation, particularly for heating and cooling, remains limited in many cases due to centrally managed energy systems in shared or multitenant buildings. Utility bills issued at the building level typically do not separate from heating, cooling, and general electricity consumption, which constrains site-specific attribution. Where direct data is unavailable, we already rely on conservative estimates based on space utilization and industry standard benchmarks to ensure coverage and transparency. At the same time, we continue to strengthen our data collection processes and landlord engagement to improve data granularity and expand reporting coverage across our portfolio.

[302-4] 2023 has been established as our baseline year for energy and emissions reporting, providing a consistent foundation for future target setting as we progress along our net zero roadmap and expand our reporting capability.

Fuel Consumption Within The Organization (KJ)

	2023	2024	2025
Renewable	691,784,392	1,462,264,056	1,021,356,000
Non-Renewable	11,430,020,282	8,115,726,240	8,664,982,225.20
Total	12,121,804,674	9,577,990,296	9,686,338,225.20

*Electricity consumption figures were recalculated following a methodology update to improve data accuracy and consistency; this change reflects methodological refinement rather than a material change in underlying consumption

Fuel Consumption by Type (KJ)

	2023	2024	2025
Total Electricity	9,421,314,422	8,684,258,400	8,583,873,109
Heat	2,700,490,253	893,731,896	1,102,465,116

Energy Intensity

[302-3] Energy intensity (KJ)	2023	2024	2025
Fuel consumption per full-time equivalent employee	2,590,129	2,391,166.77	8,583,873,109
Fuel consumption KJ per million (USD) revenue	16.98	16.35	12.85

*Fuel consumption per million USD revenue decreased from 16.35 to 12.85 during the reporting period, primarily due to revenue growth outpacing fuel consumption. While absolute fuel use remained broadly stable, higher revenue generated over the period resulted in a lower intensity metric. This improvement reflects increased operational efficiency per unit of economic output and changes in business scale, rather than a significant reduction in absolute fuel consumption alone



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.

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. The share of green-certified office space decreased to 35% in 2025 due to office closures. This metric is distinct from renewable electricity sources, which we report separately.

We continue to work towards our target to increase this number to 50% by 2030. We are assessing renewable electricity options for selected U.S. offices and will disclose locations, mechanisms, and percentage coverage in future reports. It is worth noting, flexible working has reduced typical office occupancy; we will report actual kWh consumption and intensity by location as data coverage improves.

[303-5] Our global water consumption^[1] throughout the year was 13.87 Megaliters. 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.

Going Green

Launched in 2024, SitusAMC’s Going Green initiative is now embedded within our organizational culture and supports the governance structures and learning frameworks that guide our environmental and climate strategy. The initiative reinforces our alignment with the United Nations Sustainable Development Goals by strengthening climate literacy, promoting responsible decision-making, and enabling consistent, transparent communication on sustainability related topics across the organization.

Going Green plays a key role in integrating sustainability into employee training and engagement. Through structured educational content, ongoing communications, and cross functional participation, the initiative supports awareness building and capability development, reinforcing sustainability as a shared responsibility aligned with our policies, controls, and operational practices.



Going Green Advocate, John Buckles, restores neglected land by removing invasive species and planting trees native to the area.

Climate Action



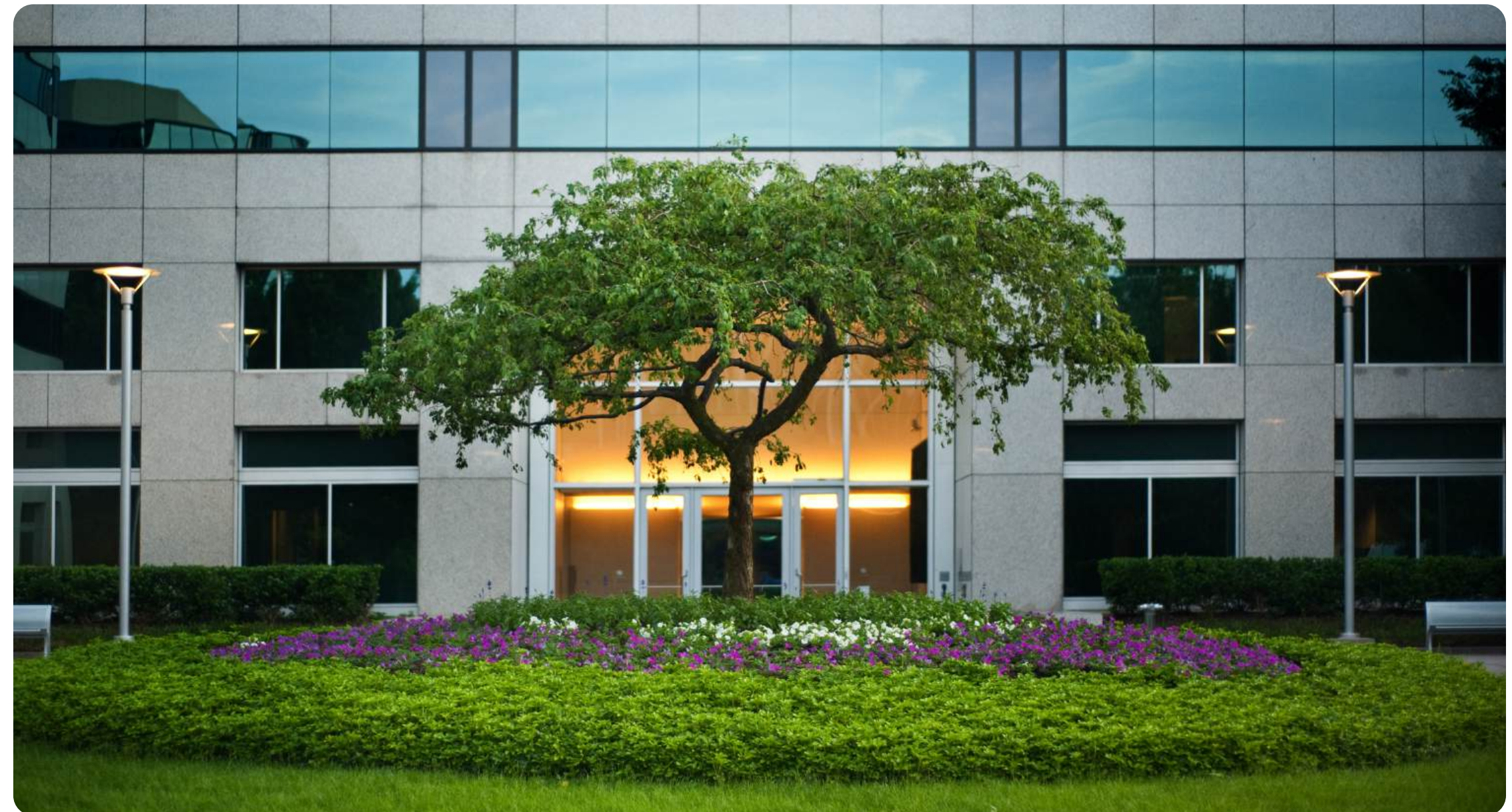
Climate Action

In 2025, SitusAMC retained a 'C' rating from CDP, demonstrating consistency in our climate-related disclosure practices and reinforcing the progress made since our improvement from a 'D' rating in prior years. Retaining this rating reflects the continued execution of our climate governance processes, data management practices, and internal accountability structures, rather than one-time or isolated efforts.

Our 2025 CDP performance underscores the stability of the foundations we have put in place to support climate awareness, reporting discipline, and decision-useful disclosures. Throughout the year, we continued to apply lessons learned from prior assessments to strengthen data quality, enhance emissions coverage, and embed climate considerations more consistently into reporting and management processes.

Maintaining this level of performance in 2025 also reflects sustained cross-functional engagement and growing internal capability in climate-related data management and disclosure. We continued to expand the depth of climate-related reporting and improve readiness for more comprehensive Scope 3 emissions coverage, aligning our practices with evolving global disclosure expectations.

Looking forward from a stronger and more consistent baseline, we will continue building on the progress demonstrated in 2025 by advancing emissions reduction planning, further strengthening Scope 3 data visibility, and enhancing the robustness and transparency of our climate disclosures. These actions are intended to support continuous improvement and position the organization for higher levels of maturity as our climate governance and management capabilities evolve.





Climate Risks & Opportunities

SitusAMC is a people-centric business that does not own or invest in physical assets beyond those required to facilitate employee-driven service delivery, such as office space, IT infrastructure, and operational equipment. This operational model limits our direct exposure to asset-level physical climate risks; however, we recognize the significance of transition risks, and physical risk impacting workforce health and productivity.

Climate Scenario Analysis

In 2025, we conducted an initial climate scenario analysis on the probability that, under the chosen scenario assumptions, the impact (exposure) of the identified risk will remain steady or elevated beyond its current level. We adopted a qualitative, multi-scenario narrative approach based on Networking for Greening the Financial System (NGFS) scenarios to explore a range of potential climate futures.

The assessment identified that there is a low to moderate impact on the heightening of the risks in any given scenario, with the impact of physical climate risk being elevated over transitional risks.

Two key risks that were elevated are Workforce health and productivity and Disruption from climate-driven events, with the mitigants of both interlinked.

Physical Risks

Chronic: Workforce health and productivity risks

Heat-related illnesses and extreme weather events may affect employee wellbeing, attendance, and productivity whether working on-site or remotely.

Acute: Disruption from Climate-Driven Events

Increased frequency and severity of climate-related disruptions (e.g., floods, storms, heatwaves) may hinder employee mobility and access to office locations, affecting business continuity.

To mitigate physical climate risks, we have operationalized a comprehensive set of resilience measures. These include a robust Business Continuity Plan (BCP) supported by an employee emergency communication system, a mature work-from-home (WFH) infrastructure, and the use of AWS-based cloud services to minimize operational disruption and data loss. Annual risk assessments continue to strengthen our disaster recovery and business continuity frameworks, enabling consistent preparation for extreme weather events.

Transition Risks

Policy & Legal Risk

In 2025, we continued to monitor evolving regulatory requirements associated with the global transition to a lower-carbon economy. The accelerating pace of climate-related regulation and mandatory disclosure frameworks introduce legal and compliance considerations for both our internal operations and the services we provide to clients.

SitusAMC maintains ongoing compliance with applicable environmental regulations and actively tracks developments in international climate risk and disclosure frameworks. A centralized regulatory tracking process is in place to identify and assess changes to existing regulations and emerging requirements. This enables timely evaluation of regulatory impacts and supports informed decision-making across the organization.

Reputational Risk and Stakeholder Expectations

We recognize that stakeholder expectations around sustainability performance and climate transparency continue to increase. In response, sustainability and climate accountability are embedded within our governance framework through a Corporate Sustainability Policy aligned with the United Nations Global Compact (UNGC) principles and the UN Sustainable Development Goals (SDGs).

In 2025, we continued to report on climate risks and management approaches through established third-party platforms, including [EcoVadis](#) and the [Carbon Disclosure Project \(CDP\)](#). These disclosures reinforce our commitment to transparency, accountability, and improvement in climate-related risk management, while supporting consistent engagement with investors, clients, and other stakeholders.

A photograph of two women in an office setting. The woman in the center is smiling and looking towards the right. She has long, dark hair and is wearing a light-colored, long-sleeved blouse. She is holding a black folder or binder. The woman on the right is partially visible, showing her long, wavy hair and glasses. The background consists of large windows with a grid pattern, suggesting a modern office environment.

People & Culture



People & Culture

In 2025, SitusAMC continued to strengthen a workplace culture based on safety and respect. We seek to provide an environment in which employees are able to perform effectively, develop professionally, and contribute in meaningful ways. A consistent focus on trust, open dialogue, and psychological safety supports positive working relationships across the organization. These principles are reflected in our leadership approach. People policies and everyday operating practices.

Our culture emphasizes collaboration and the inclusion of diverse perspectives, enabling employees to bring their individual experiences to work. Through continued investment in learning, responsible leadership practices, and a continued focus on employee well-being, we reinforce a people-centric environment that supports innovation, professional growth, supports engagement and long-term value creation.

SitusAMC is headquartered in New York and operates across 28 locations in five countries, with a workforce of more than 4525 employees as of 2025. Our employees are based across three regions the United States, Europe, and India with the majority employed in full-time, permanent roles. This global footprint is supported by consistent people's practices and governance frameworks designed to maintain alignment while responding to local workforce needs.





People & Culture (cont.)

Employees per region

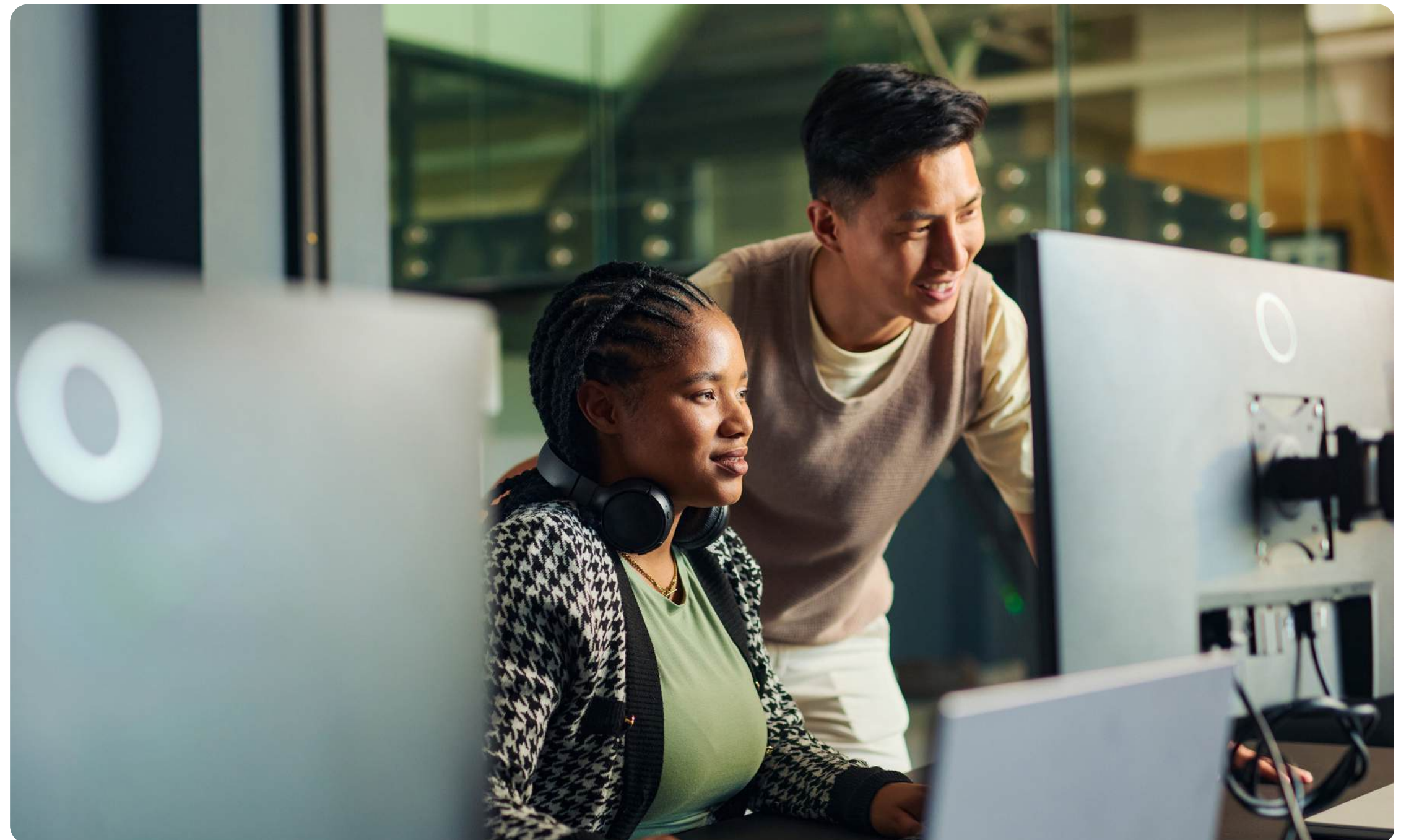
[401-1] We welcomed 566 new joiners during the reporting year, while 943 left the organization.

Full-time employees (Including Contractors and excluding temporary employees)

	2024	2025
India	2764	2550
USA	1851	1834
Europe	94	93
Total	4709	4477

Part-time employees, by region

	2024	2025
India	11	8
USA	189	155
Europe	6	7
Total	206	170





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 2025, we have exceeded this promise by paying well 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.

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

Employee Resource Groups (ERGs) as an integral component of our inclusive workplace strategy. These employee-led groups foster belonging, support, and empowerment by providing forums for employees to connect around shared experiences, perspectives, and professional interests. ERGs help amplify employee voices, strengthen engagement, and promote cross functional collaboration and cultural awareness. Through continued support of ERGs, we reinforce a workplace culture where employees feel valued and respected, contributing to innovation, workforce resilience, and long-term organizational success.

Building on the success of our existing ERGs, we are supporting the establishment of additional ones over the coming years.



“Employee Resource Groups translate connection into meaningful impact. Serving on the Working Parents & Caregivers ERG board has been especially meaningful, providing a supportive space for employees to share experiences, exchange ideas, and navigate the realities of balancing work and life. Together, these groups foster connection, inclusion, and a culture where employees feel supported and empowered to grow. I am proud to be part of these communities and grateful to the colleagues who continue to strengthen them every day.”



Jane Maul
Managing Director,
Residential Real Estate Chief Product Officer



Inclusion & Belonging (cont.)

Rising Professionals

YoY Membership Increase **+87%**

Rising Professional aims 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. Rising Professional 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.



“The Rising Professionals ERG fosters an inclusive and supportive environment that promotes mentorship, innovation, and employee wellbeing. By connecting talent across levels from interns to senior leaders the ERG enables early-career professionals to develop personally and professionally, provides access to opportunities beyond traditional roles, and strengthens a shared sense of pride and belonging. As a young person in my first job, the ERG has pushed me to develop both personally and professionally, giving me opportunities that I wouldn't have access to elsewhere.”



Andrew Nicolaou
Analyst,
Board Member

Working Parents & Caregivers

YoY Membership Increase **+51%**

Balancing professional responsibilities with caregiving commitments presents distinct challenges for many employees. The Working Parents & Caregivers ERG provides a supportive forum for connection, shared experiences, and practical guidance. Through open dialogue and access to relevant resources, the ERG helps foster a workplace where caregivers feel supported, valued, and empowered to succeed professionally while managing caregiving responsibilities.



“My journey with the Working Parents and Caregivers (WPC) ERG has reaffirmed that inclusion and performance go hand in hand. Personally, it has helped me navigate parenting with greater confidence. WPC is a great forum to share real insights, help shape more inclusive practices, and ensure no one feels they have to choose between their family and their career.”



Rupali Srivastava
Senior Manager, Training & Instructional Design
Board Member

Women's Network

YoY Membership Increase **+15%**



“When I first joined the Women Network, I was excited about the opportunity to connect with colleagues in different areas of the company. Having been with SitusAMC for 19 years, I've seen firsthand how exponentially we've grown, and it's incredibly rewarding to meet people across the organization and truly understand the depth and impact of the work we do. What I didn't expect was how much I would enjoy serving on the board. Being part of an ERG creates a safe space where people can practice leadership, test ideas, and learn how to manage expectations as leaders. Watching others grow, build confidence, and apply those skills back into their day-to-day roles has been one of the most fulfilling experiences. The skills developed through ERGs don't just support professional growth—they prepare individuals to take on real challenges with confidence and clarity.”



Nicole Bozich
Senior Director, CRE Technology Enablement
Business Architect



Learning and Development

In 2025, SitusAMC continued to take an inclusive and structured approach to learning and development, reinforcing shared accountability among employees and leaders for performance, skill development, and career progression. We actively help employees understand and access the learning programs and resources available to them, supporting skill development that enhances effectiveness in current roles while preparing individuals for future responsibilities.

Our learning model emphasizes experiential development. Employees gain on-the-job exposure to a broad range of clients, business areas, and operational processes, building practical skills and confidence through hands-on experience. Collaboration and knowledge sharing remain central to our culture, with teams encouraged to leverage collective expertise, exchange ideas, and develop solutions together.

Ongoing training is a standard component of employment at SitusAMC. All employees complete annual mandatory training covering key compliance topics, including insider trading, ethics, and anti-bribery and corruption, among other requirements relevant to operating as a registered investment adviser. In addition, all employees complete an annual Sustainability training module, reinforcing awareness of environmental, social, and governance responsibilities, and supporting consistent understanding of our sustainability commitments across the organization.

[404-1] [404-2] We offer a robust digital learning ecosystem through Workday Learning, featuring 637 open-enrollment courses accessible to all employees and contingent workers. In addition, 178 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:

- CRE New Hire Program for non-experienced and experienced
- CRE Intro/Terminology
- CRE Lease Concepts
- CRE Introduction into Appraisals
- CRE Intro to RE Finance
- CRE Loan Basics
- SitusAMC CRE department specific overview training
- Commercial Multifamily Fundamentals
- Commercial Multifamily Origination and Underwriting
- Commercial Multifamily Loan Documentation and Closing
- Commercial Multifamily Sale and Securitization and CMF Servicing
- Risks and Consequences of Commercial/Multifamily Loans Training Session
- RRE Mortgage Basics & Fundamentals
- RRE Due Diligence/Audit (Compliance, Credit, Income, Fees, Modifications, Title, and Servicing)
- RRE UW Training/Fulfillment
- RRE Collateral
- SitusAMC RRE department specific overview training
- Excel Training (three individual, progressive, courses)
- 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 improve their skills 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

	2024	2025
Senior Management	7.82	6.9
Middle Management	13.49	11.37
Individual Contributor	11.01	12.51
Sales & Marketing	6.77	12.51
Legal & Regulatory	9.57	12.51
Support Functions	9.54	12.51



Learning and Development (cont.)

Training Update

Streamlining of Compliance Training

As part of the comprehensive review of compliance related modules in 2024, the introduction of test-down in 2025 within some of the modules allowed for knowledge-based time efficiency to be implemented, thus reducing the time spent on certain topics.

Increase in Training Hours for Non-Leadership Roles

With the introduction of comprehensive instructor-led training including the emerging leader program, training across the core employee base significantly increased from the previous year.

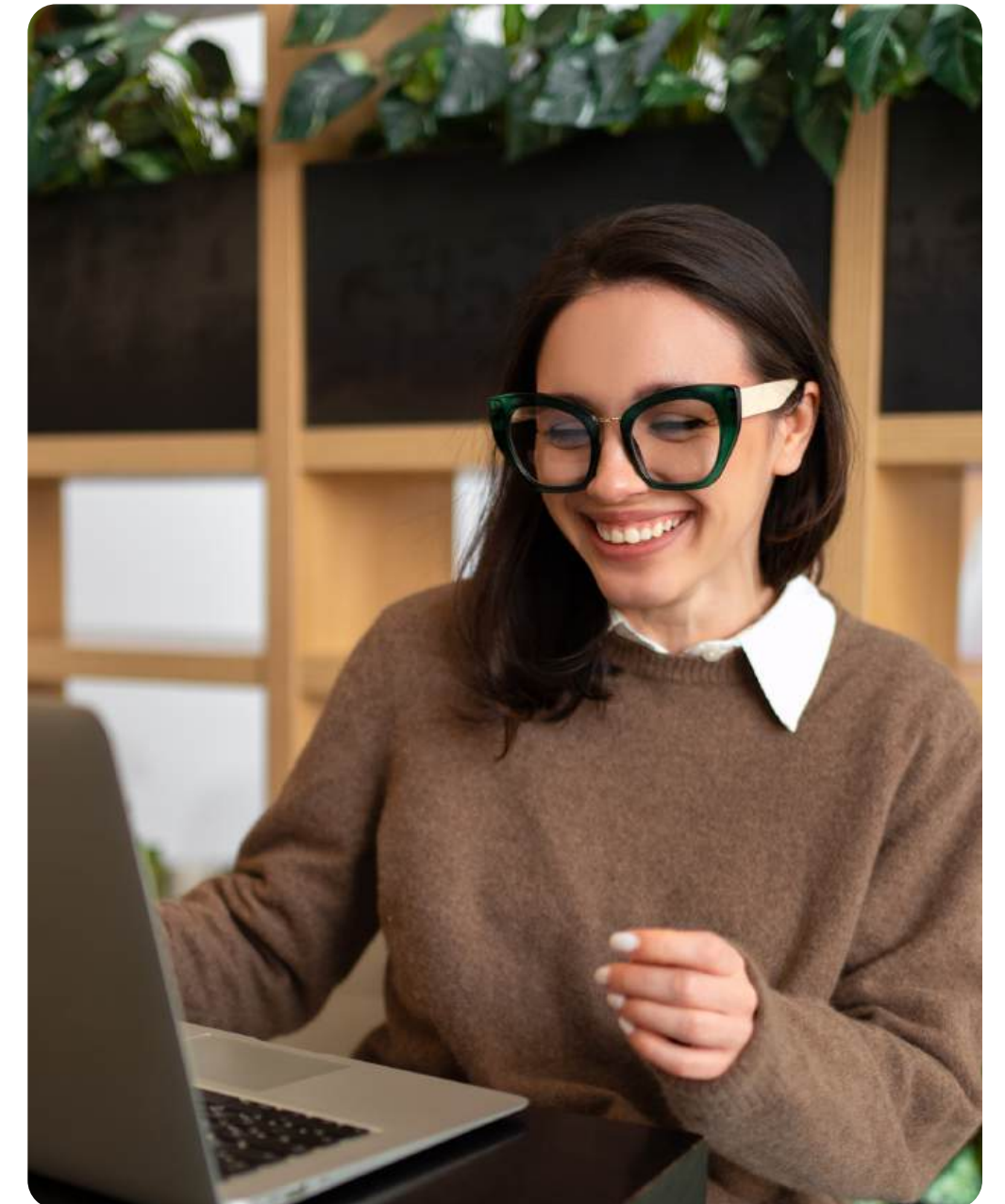
Performance and Success

In 2025, SitusAMC continued to maintain a structured and consistent approach to performance management and career development, supporting a workplace culture where employees are supported and equipped to reach their full potential [404-3]. Except for employees on parental or extended leave, all employees participate in regular performance and career development reviews as part of standard people management practices.

These reviews are designed to be forward-looking and meaningful, providing employees with dedicated one-on-one discussions with their managers. Conversations focus on progress against individual and team objectives, career aspirations, and targeted development support, including mentoring related to strengths and areas for growth.

In addition to ongoing check-ins, we conduct a comprehensive year-end performance review process. This structured evaluation assesses performance against predefined objectives and considers overall contributions, professional development, training needs, and readiness for advancement. Outcomes from this process directly inform decisions related to promotions, compensation adjustments, and future development opportunities, reinforcing accountability and alignment with business goals.

Participation in regular performance and career development reviews remains consistently high, with over 99% of eligible employees completing reviews in 2025. These practices support a high-performance environment that values continuous learning, recognizes achievement, and promotes long-term career progression.





Employee Engagement

In 2025, SitusAMC continued to demonstrate a strong commitment to fostering an engaging and high performing workplace. Our approach to employee engagement remains intentionally aligned with business objectives, supporting the attraction and retention of talent while cultivating a culture that encourages innovation, collaboration, and sustainable performance.

Employee engagement is underpinned by the core elements that shape our employee value proposition: organizational culture, employee experience, and recognition. These elements guide how we connect, communicate, and collaborate across the organization.

Connecting Colleagues

Building and maintaining connection across a global workforce remains a priority. Following enhancements introduced in 2023, our internal engagement platform, Move the Chain, continues to serve as a central tool for strengthening connectivity, communication, and inclusion in 2025.

Employees actively use the platform to share perspectives, participate in polls, and provide feedback, reinforcing a culture of openness and dialogue. Expanded community features support connection through interest-based groups, local office networks, and employee resource groups (ERGs), promoting collaboration across functions and geographies. The platform also serves as a centralized hub for company news and event updates, helping employees stay informed and engaged.

Peer-to-peer recognition and work anniversary acknowledgments on the platform have enhanced employee engagement and provided broader, more visible recognition beyond email communication.

Through continued use and adoption, Move the Chain has strengthened internal communication, increased participation, and reinforced our commitment to a connected, collaborative, and inclusive workplace.

MOVE THE CHAIN - BY THE NUMBERS

80%
of employees on
MTC generating:

1,744 Posts

54,648 Reactions

3,340 Comments

Participating across 32 employee-initiated communities.



St. Petersburg office volunteering at Feeding Tampa Bay.



Houston office Habitat for Humanity



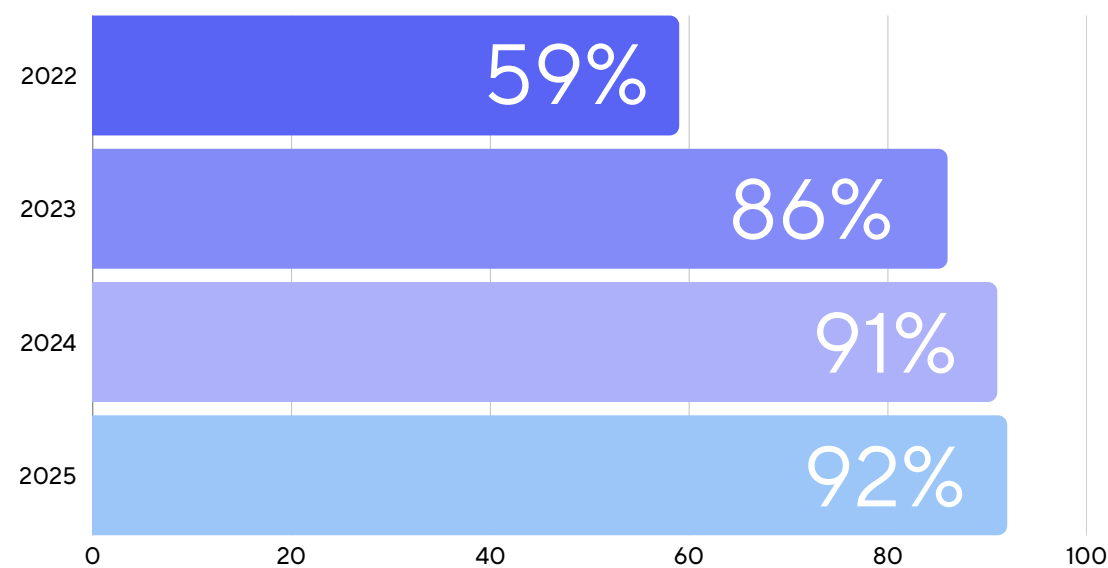
Employee Engagement (cont.)

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.

At the end of 2024, our eNPS score of 55 included responses from employees with less than three months of tenure. This group consistently scored higher than more tenured employees, which is typical given early onboarding optimism and limited exposure to ongoing challenges. Because of this, we considered our 2024 end of year score as inflated and not as realistic.

In 2025, we removed employees under three months of tenure from the calculation to ensure the score more accurately reflected the sentiment of employees with enough experience to assess the organization. As a result of this change, the eNPS score adjusted to 48.



Our Positive Net Promoter Score (NPS) for 2025 is 48 (11pt improvement April 2025 to September 2025)- We're also in the top 10% Commercial & Professional Services Industry.

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 continuous improvement, transparency, and employee empowerment.



2025 CEO Excellence Awards Ceremony.

Promoting a Culture of Recognition & Appreciation

In 2025, SitusAMC continued to strengthen its commitment to recognizing employees who go above and beyond in delivering value to clients and contributing to the advancement of our business. Employee recognition remains a core component of our people's strategy, reinforcing behaviors aligned with our values of [integrity](#), [collaboration](#), and [excellence](#), while supporting engagement, retention, and a positive workplace culture.

Our [Global Rewards and Recognition Program](#) plays a central role in acknowledging employee contributions across the organization. The program offers multiple pathways for recognition, enabling both peer-to-peer and leader-driven acknowledgment. Through our digital platform, [Move the Chain](#), employees can publicly recognize colleagues' achievements, with managers notified to amplify visibility and celebrate success across teams and functions.

Formal recognition is further supported through our [iPower Awards](#), which celebrate employees who consistently exceed expectations and demonstrate excellence in their day-to-day work for SitusAMC and their colleagues.

In 2025, 43 employees were recognized through the [iPower Awards](#) program, reflecting continued participation and impact.

Building on this foundation, we expanded our recognition framework in 2025 with the launch of the [CEO Excellence Awards](#), the highest honor within our recognition programs. These awards celebrate outstanding individual achievements that exemplify leadership, impact, and alignment with our core values.



Employee Engagement (cont.)

In 2025, 23 employees (8 US, 2 Europe, and 13 India) were recognized through the CEO Excellence Awards, further reinforcing our commitment to celebrating excellence at all levels of the organization.

Looking Ahead

Employee well-being remains a priority across our people strategy. We actively integrate well-being, equity, and sustainability considerations into how we design our workplace, support our employees, and engage our teams. Through ongoing evaluation of policies, programs, and resources, we strive to enhance physical, mental, and professional well-being, ensuring our workforce is supported in a holistic and meaningful way.

As part of this commitment, SitusAMC continues to invest in initiatives that promote a healthy, inclusive, and supportive work environment. These efforts are aimed at continuously improving employee experience and reinforcing a culture where individuals are empowered to perform at their best. By embedding well-being into our organizational practices, we aim to ensure that our workplace remains not only a great place to work, but one that continues to evolve alongside the needs of our people.



“Together, these recognition programs support a culture where contributions are visible, achievements are celebrated, and employees feel valued and empowered to perform at their best”



Casey Edwards
Director, Global Talent Management



SitusAMC Pune Shines at the Malpani Annual Cricket Tournament 2026!



Our Kansas City, MO office was #SitusAMCSpotted at Fowling Warehouse for an engaging team building outing.



Our London office team members played and won, 15-12, in a game of 5-aside with our industry peers.



Iowa office food bank volunteering



Employee Well-Being

In 2025, SitusAMC continued to strengthen its commitment to supporting the holistic well-being of our employees, recognizing that a healthy, supported workforce is essential to long-term organizational success. Building on established practices, we continue to invest in initiatives that promote physical, financial, social, and emotional well-being across our global workforce.

Our well-being framework, including a dedicated wellness week, is designed to be inclusive, flexible, and responsive, offering a range of voluntary programs and resources that reflect the diverse needs of our employees. These include health and wellness incentives, stress management and resilience resources, family support services, and financial wellness programming.

We continuously evaluate and enhance our well-being offerings to ensure they remain relevant and effective, supporting employees at different life stages and across geographies. Working closely with our employee resource groups ensures we also deliver on specific topics around well-being.



Taking Care of Our People

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.

[403-6] The organization offers employees' who are eligible voluntary medical benefits, access to regional health events, and an Employee Assistance Program (EAP). In the United States, for example, employees who are eligible are entitled to six to eight weeks of fully paid maternity leave, based on type of delivery for the birth of a child.,

We make all information accessible via the company intranet site, open enrolment, 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

We maintain a Disaster Relief Fund to support employees who are impacted by natural disasters, including climate-related events. This fund is currently available to our employees, who are eligible, providing them with financial assistance during times of unexpected hardship. We regularly review the scope of this support and will continue to evaluate opportunities to extend assistance to employees outside the United States when appropriate.

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

Well-being In Our Culture

As part of our ongoing commitment to employee well-being, environmental stewardship, and community engagement, SitusAMC actively promotes a culture of volunteering and wellness. Employees across our offices regularly participate in environmental and social volunteering initiatives, for which they are recognized with compensatory time off, reinforcing our dedication to responsible corporate citizenship.

In 2025, we deepened our focus on holistic employee well-being through meaningful, organization-wide initiatives. For reference the launch of Care Connect, our Employee Assistance Program (EAP) in partnership with 1to1 Help, enables round-the-clock access to confidential counselling, crisis support, and digital self-care resources. We further strengthened mental resilience through targeted learning sessions on "Building Resilience" from the EAP partners, while physical well-being was actively promoted via a high-participation month-long "Step-a-thon Challenge" with Loop Health and comprehensive on-site health check camps, including dental and vision screenings—reinforcing preventive care and healthier lifestyles across the workforce.



Employee Well Being (cont.)

[401-3] At SitusAMC, we are committed to supporting our employees across all our global offices through every stage of parenthood with inclusive and regionally tailored and standard parental leave policies. These benefits are available to all active, full-time regular employees.

Health & Safety

[403-1] [403-5] [403-7] SitusAMC maintains a proactive and preventive approach to occupational health and safety, supported by clear policies, regular oversight, and consistent communication. In 2025, SitusAMC continued to integrate Health, Safety, and Environmental (HS&E) principles into core business practices, reinforcing a proactive approach to employee well-being and operational excellence. We continued to strengthen our safety culture through comprehensive training programs designed to raise awareness, reinforce accountability, and support safe working practices across all locations.

All employees' complete mandatory health and safety training as part of onboarding, with annual refresher training required to reinforce awareness and compliance. Training modules include Healthy Working, Workplace Safety, fostering a Culture of Support, and Remote Working: Creating the Right Environment. These programs equip employees with the knowledge and tools to maintain safe, productive, and healthy work environments, whether operating from office locations or remotely. Through continued implementation and enhancement of these practices, SitusAMC remains committed to protecting employee health and safety while advancing a culture of prevention, care, and continuous improvement.

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. In addition, during 2025, we conducted first aid training across our India offices,

equipping employees with essential emergency response skills and strengthening on-site preparedness. This initiative enhances employee confidence, improves workplace safety readiness, and supports our commitment to maintaining a safe and responsive working environment. Through continued implementation and enhancement of these practices, SitusAMC remains committed to protecting employee health and safety while advancing a culture of prevention, care, and continuous improvement.

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.

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.

[403-8] Our health and safety management system follows 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.



“Facilities are central to delivering an organization’s health and safety commitments ensuring compliant, resilient workplaces that protect employees and enable performance. Safe, well-maintained environments build trust, well-being, and sustainable productivity. When employees feel safe, healthy, and supported, they perform at their best-and Facilities make that possible by embedding safety and well-being into every aspect of the work environment.”



Precilla D'sa
Vice President
Facilities – India



Supporting Our Communities



Supporting Our Communities

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



SitusAMC takes a holistic approach to meet the evolving needs of our communities through our philanthropy and volunteerism program. Through the direct contribution from the company and our employees, including employee 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 - Future Youth 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 2025, this program recorded 3819 hours of volunteer service across our global offices and an increase of 61.7% from 2024.

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.

2025 VOLUNTEERING RESULTS

\$185.4K

Corporate Charitable Contributions

\$30K

Employee Donations Matched by SitusAMC

3819

Hours Volunteered

75+

Number of Beneficiary Organizations



Supporting Our Communities (cont.)

What Our Partners Have to Say



Habitat For Humanity
[habitat.org](https://www.habitat.org)



“SitusAMC is proud to partner with Habitat for Humanity to support affordable housing and resilient communities across the U.S. Through this partnership, SitusAMC 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”



Justin Ortiz
Associate,
Marketing



Future Youth UK
[thefutureyouth.org](https://www.thefutureyouth.org)



“It has been a pleasure to support Future Youth Zone over the past year through our volunteering and sponsored events. Through a combination of hands-on volunteering and donations, we have helped elevate their events and ensure the children have truly positive, memorable experiences. The warmth and excitement the children show at every event is incredibly rewarding, and it is always eye-opening to see the scale of need for a center like this within the community. As an Office Manager, I wear many hats, but supporting charities such as Future Youth Zone is one of the most fulfilling aspects of my role.”



Alexandra Stavrou
AVP,
Facilities



Vrikshit Foundation - India
[vrikshitfoundation.org](https://www.vrikshitfoundation.org)



“Being part of a volunteer initiative has been a meaningful and rewarding experience. Contributing to a positive impact and witnessing the difference collective effort can reinforces the importance of giving back and supporting our communities. I am always grateful to be part of a cause that creates lasting change.”



Sophia Fernandes
AVP,
Facilities



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 charitable organizations.

During the year, we helped to raise over USD 245,000, with USD 185,000 donated by SitusAMC and USD 30,000 donated by employees and USD 30,000 Matched by SitusAMC. Organizations that benefited included:

- Habitat for Humanity
- Northwell Foundation
- Wish for Wheels
- Fisher House Foundation, Inc.
- Guild Giving Foundation
- Special Olympics, Inc
- Feeding America
- Tunnel To Towers Foundation
- Girls who Code
- American Red Cross

In a further bid to engage employees with our employee engagement platform we are proud to donate a dollar to UNICEF for every employee that joins Move the Chain. A commitment we have held since the launch of the platform in 2023.

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



Habitat for Humanity

[habitat.org](https://www.habitat.org)



Northwell Foundation

[give.northwell.edu](https://www.give.northwell.edu)



Wish for Wheels

[wishforwheels.org](https://www.wishforwheels.org)



Fisher House Foundation, Inc.

[fisherhouse.org](https://www.fisherhouse.org)



Guild Giving Foundation

[guildgiving.org](https://www.guildgiving.org)



Special Olympics, Inc

[specialolympics.org](https://www.specialolympics.org)



Feeding America

[feedingamerica.org](https://www.feedingamerica.org)



Tunnel To Towers Foundation

[t2t.org](https://www.t2t.org)



Girls Who Code

[girlswhocode.com](https://www.girlswhocode.com)



American Red Cross

[redcross.org](https://www.redcross.org)



Corporate Social Responsibility Committee – India

In 2025, SitusAMC strengthened its social responsibility framework in India through the formation of a dedicated Corporate Social Responsibility (CSR) Committee, enhancing local governance, oversight, and accountability for community initiatives. The committee provides a structured approach to identifying, prioritizing, and managing CSR activities, ensuring alignment with organizational values and local community needs.

A key focus of the CSR Committee is to actively promote employee volunteering and strategic donations, creating meaningful opportunities for employees to engage with and support the communities in which we operate. The committee helps coordinate volunteering initiatives, guide charitable contributions, and ensure that donations are directed toward credible, high impact causes. By enabling structured volunteer participation and transparent donation governance, the committee strengthens employee engagement while amplifying positive social outcomes.

The establishment of the CSR Committee marks an important step in embedding social impact into our local operations and reinforces our commitment to responsible growth, community partnership, and long-term value creation in India.



A man with a beard and glasses, wearing a blue suit jacket and a light blue shirt, is speaking and gesturing with his hands in a meeting. He is looking towards the right. In the background, another person is partially visible, looking down. The scene is set in a modern office environment with blurred background elements.

Responsible Business Practices



Responsible Business Practices

SitusAMC’s approach to responsible business conduct is guided by established governance structures, ethical standards, and a steadfast dedication to environmental and social stewardship. Sustainability considerations are embedded within key operational processes, enterprise risk management, and stakeholder engagement activities to support long-term value creation. The organization promotes a culture of compliance, inclusivity, and continuous improvement, with the objective of maintaining high standards of corporate responsibility and contributing positively to the communities and markets in which we operate.

[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 alignment with 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.



‘As competing national interests increasingly place greater emphasis on effective sanctions management, SitusAMC upholds an adaptive and agile approach toward international risk management practices. Responsive, but robust sanctions controls enable us to minimize exposure, safeguard operations, and maintain the highest standards of integrity across the jurisdictions in which we operate.’



Marco Biscontin Campos
VP, Compliance

The Compliance Department provides regular reports detailing incidents, complaints, and regulatory matters. [205-1] In 2025, under our Risk Management and Governance Framework, we refreshed the corruption-related risks assessment of 16 operational units—representing 42% of our business—with no significant risks identified.

To reinforce our ethical standards, all employees, including executive leadership, are required to complete annual anti-corruption training. In 2025, 4,647 employees, including our CEO, successfully completed this training.

[205-2] Our anti-corruption policies and procedures have been communicated to 1,704 business partners in 2025 (for example clients and suppliers).



Responsible Business Practices (cont.)

Internal Audit

In 2025, the Global Internal Audit function focused on delivering independent, risk-based assurance across the enterprise, reflecting its progression from establishment to execution. The function completed eleven internal audit engagements aligned to the approved multi-year audit plan, with emphasis on core operational, security, and governance risks.

Internal Audit continued to enhance its audit methodology, risk assessment processes, and reporting practices, strengthening consistency, transparency, and accountability. This assurance-focused approach supported effective oversight by management and the Board and reinforced the organization’s commitment to sound governance and risk management.

Looking ahead to 2026, Internal Audit plans to deliver ten audits and selectively expand advisory support on key enterprise initiatives, including emerging technology and security-related governance, while maintaining independence and objectivity.

Enterprise Risk Management

In 2025, SitusAMC established its Enterprise Risk Management (ERM) program to enhance enterprise-wide risk identification, prioritization, and oversight. The program was designed to support consistent, forward-looking risk management aligned to the organization’s strategy and objectives.

During the year, management defined the ERM framework, identified and assessed enterprise risks, and established a common risk rating methodology. Leadership aligned on the organization’s most significant risks and initiated structured plans to manage and monitor these risks into 2026.

The ERM program also emphasized leadership engagement and education. Senior leaders were oriented to the ERM framework, their roles and responsibilities, and the importance of active risk ownership, supporting a stronger risk-aware culture across the organization.

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 [Tax Director, 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 our tax profile or regulatory requirements.

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

SitusAMCs ability to provide them with the highest standard of service. In 2025, the Compliance department performed more than 46 assessments of risk of conflict of interests, covering over 1472 assets transactions, none of them leading to the requirement of a set-up of dedicated information barriers.



“Enterprise Risk Management provides a common lens for understanding risk across the organization, and 2025 marked an important step in building that shared discipline and ownership.”



John Reilly
Senior Director,
Internal Audit



Responsible Business Practices (cont.)

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 to 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.

Identifying & Raising Concerns

[2-25] Through our established processes during 2025, we identified one significant adverse impact which is further discussed in the Information Security Section. This assessment reflects current data coverage and will be reviewed as we enhance due diligence and reporting. 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 behaviour 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, corporate Sustainability, 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

SitusAMC's information security program is designed to protect the security, availability, confidentiality, and integrity of our computer systems, networks, software and information assets that support our business and our clients. Cybersecurity is a foundational element of our enterprise risk management framework, and we have a longstanding commitment to continuously strengthening our security posture as the threat landscape evolves.

Cybersecurity Governance and Resilience

Over the past twelve months, we have made substantial investments to advance our security capabilities, including strengthened identity and access management controls (including broader deployment of phishing-resistant multifactor authentication), enhanced endpoint detection and response tooling, refinements to data loss prevention and data security posture management, and hardening of perimeter defences. SitusAMC has engaged leading third-party security advisors to support the design, deployment, and independent validation of these enhancements. We also have a robust third-party risk management program to ensure comprehensive protection across our digital ecosystem.

As part of our commitment to transparency and continuous improvement, we align our cybersecurity controls with updated global standards, including NIST Cybersecurity Framework (CSF) 2.0 and ISO/IEC 27001:2022.

In parallel, SitusAMC continues to mature its cybersecurity governance through deeper board-level engagement and further embedding cyber risk across the organization and our enterprise risk management processes.



Responsible Business Practices (cont.)

[418-1] In late 2025, SitusAMC identified and responded to a cybersecurity incident affecting a limited portion of its internal environment. Leveraging our established incident response protocols and the support of leading external advisors, we promptly contained the incident while maintaining continuity of critical business operations. Our response was coordinated across cybersecurity, legal, compliance, and executive leadership functions.

We view robust cybersecurity as a fundamental aspect of our enterprise risk management strategy and essential to operational resilience, client trust, and the long-term value we deliver to our clients, employees, and other stakeholders. As the cyber threat landscape continues to evolve, SitusAMC remains committed to ongoing investment in our people, processes, and technology.

Responsible Procurement

At SitusAMC, we are committed to fostering sustainability, transparency, and accountability throughout our supply chain, recognizing the long-term value this creates for our business, clients, and the communities we serve. Our expectations for responsible business conduct are clearly articulated in our publicly available [Vendor Code of Conduct](#), which applies to all third parties providing goods and services to our organization.

Sustainability considerations are embedded within our supplier risk assessment, due diligence, and vendor selection processes to support alignment with our environmental and social objectives. Through our

[Vendor Risk Management Program](#), we maintain oversight of outsourced services that may pose heightened operational, compliance, reputational, strategic, data protection, or information technology risks, particularly where services involve sensitive data or are critical to client delivery.

[308-1] [308-2] [409-1] [414-1] [414-2] We apply a risk-based approach to vendor evaluations with enhanced due diligence for higher-risk vendors. In 2025, all vendors with annual expenditures exceeding USD 1 million were subject to environmental and social screening as part of our onboarding process. During the reporting period we screened 165 vendors using our risk-based process; none met our threshold for significant adverse impacts. [308-1]. The only exceptions to this assessment process were cases where clients required the engagement of a specific supplier.

Building on these established practices, in 2025 we initiated a sustainability vendor risk assessment project to further strengthen supplier due diligence and oversight. This initiative expands our review of vendors to incorporate those we identified as have elevated risk of environmental impact or labor and human rights practices. The project enhances our ability to identify, assess, and manage sustainability-related risks within our supply chain and reflects our continued commitment to responsible sourcing and continuous improvement in vendor governance. Through the ongoing evolution of our supplier risk management framework, we aim to strengthen resilience across our value chain and promote responsible, sustainable business practices among our vendor and supply chain.



“Enhancing our vendor due diligence process has been fundamental as services and technologies continue to evolve rapidly. By modernizing our vendor questionnaires, we are able to better identify emerging risks from new technologies which allows us to proactively address potential cybersecurity and regulatory compliance challenges.”



Misty Roscoe
Associate,
Vendor Management



Responsible Business Practices (cont.)

EcoVadis Sustainability Rating

SitusAMC has continued to leverage EcoVadis as an external benchmark to measure and guide the evolution of our sustainability program. In 2022, we completed our first formal EcoVadis assessment and received a Bronze rating, marking an important milestone in establishing a structured and measurable approach to sustainability.

Building on this foundation, we advanced our practices and were awarded a Silver rating in 2023, which we successfully maintained in 2024. This achievement reflected meaningful progress across multiple sustainability dimensions and the collective efforts of teams across the organization to embed responsible business practices into operations, governance, and decision-making.

In 2025, SitusAMC received a Bronze rating, reflecting a recalibration period as our sustainability program continues to mature alongside evolving assessment criteria and expanded internal data standards. During the year, we focused on strengthening foundational elements such as data quality, governance processes, and supplier due diligence, positioning the organization for more scalable and consistent performance in future assessments.

The EcoVadis assessment remains a valuable tool for identifying gaps, prioritizing actions, and reinforcing accountability. As our sustainability framework continues to evolve, we remain committed to enhancing transparency, strengthening performance across assessment categories, and continuing progress toward higher maturity sustainability practices in future rating cycles.



About This Report



About the Report

Report Scope

[2-1] This Corporate Responsibility Report covers the period from January to December 2025 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 have shared 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.

Understanding the Material Issues

[3-1] Our last 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] Through the assessment, we identified eight core focus areas across the pillars of environmental, social, and governance (ESG) which formed the foundation of our sustainability strategy and reporting framework. By aligning our efforts with stakeholder expectations, we ensured that our initiatives remain transparent, relevant, and impactful.

We did not conduct a materiality assessment in 2025 due to significant shifts in the geopolitical landscape. Instead, we prioritised monitoring these developments and assessing evolving client responses to ensure that future materiality analyses are grounded in a stable well-informed context. Hence, we continued focusing on the material issues identified previously, evolving them real time as per our stakeholder needs and requirements.

	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	Medium	High	Medium
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 2025, we continued 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.

Further Information



Further Information

[2-3] Questions related to this report or the Sustainability information it contains should contact the Senior Director, Corporate Sustainability at (corporatesustainability1@situsamc.com)

See also www.situsamc.com.

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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	<p>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%.</p> <p>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.</p> <p>India: A state-funded pension plan exists for employees who earn less than INR 15,000. There is no employer contribution.</p>	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	<p>None were found to be at significant risk.</p> <p>The company operates in professional offices in the professional financial services sector in the United States, India, the UK, and the EU.</p> <p>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.</p> <p>The company does not limit employee's right to exercise their freedom of association and collective bargaining.</p>	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		



Powering
opportunity
everywhere.

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



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