

# APPENDIX A - DEFINITIONS - RESPONSIBLE INVESTMENT

Date	Number
June 26, 2014	B 10.16
Date of Last Review/Revision	Mandated Review
November 24, 2022	November 24, 2027

Policy Authority: Vice-President, Finance and Administration

Parent Policy: Responsible Investment Policy (B.16)

## 1.0 PURPOSE

1.1 The definitions in this Appendix define the words used in the Responsible Investment Policy (B 10.16)

## 2.0 DEFINITIONS

2.1 Environmental, social and corporate governance (“ESG”) means an approach to investing that integrates ethical values and societal concerns with investment decisions.

2.2 Financial Investments means Endowment Funds and Non-Endowment Funds.

2.3 Fossil Fuel Free means screening out all Energy holdings, excepty TM766(p)10.9 (r)-4 (r)6.9 (e)-1.6n (e)- portfolio. The equity portfolios will screen out all Energy holdings as defined by the Global Investment Classifications Standards (GICS). The fixed income portfolios will screen out all Energy holdings with the exception of renewable energy, as defined by the FTSE Russell bond indices.

2.4 University means Simon Fraser University (“SFU”)