

# Broadridge Launches New End-to-End Solution for SFDR Reporting

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Solution helps funds streamline ESG reporting and meet SFDR requirements

NEW YORK and LONDON, Oct. 31, 2022 /PRNewswire/ -- To better support European asset managers in meeting their compliance obligations for the upcoming Sustainable Finance Disclosure Regulation (SFDR), global Fintech leader **Broadridge Financial Solutions** (NYSE:BR) today announced the launch of its new end-to-end managed service solution.

Starting January 1, 2023, SFDR requires asset managers to consider and disclose in a consistent manner how ESG factors are adopted in their decision-making processes. For Articles 8 and 9 funds, this includes a Pre-contractual Disclosure (PCD), Periodic Disclosure (PD) and Website Disclosure (WD).

Additionally, starting June 30, 2023, asset managers will also be required to produce a Principal Adverse Impact (PAI) statement to determine the impact of their investment decisions on sustainability factors.

"Asset managers continue to navigate a very complex and changing regulatory landscape and are under increasing pressure to disclose more ESG data to investors," said Afzal Amijee, Commercial Director at Broadridge Fund Communication Solutions. "We are excited to be bringing to market a fully managed end-to-end ESG solution comprising SFDR and the European ESG Template (EET) reporting requirements. This will enable asset managers to efficiently provide data by leveraging automation and existing network links amongst fund distribution channels to ensure they have data and regulatory documents at the right time for their end clients."

Designed for asset managers looking after EU-domiciled funds, and UK funds being marketed to EU investors, Broadridge's new managed service solution offers comprehensive support for all aspects of the composition,

production, translation, and hosting of required disclosures under SFDR — including PCD, PD, WD and PAI — as well as maintenance and distribution of the European ESG templates.

Documents can be translated into 35 different languages in line with requirements, and distributed across a variety of channels, including embedded URLs or a document library, for dissemination to platforms or additional end points.

Broadridge Fund Communication Solutions provides a comprehensive digital platform and has a proven track record of supporting the life cycle of fund data, documents, and regulatory reporting for the global asset management industry. It manages and distributes data for over 1,000 global fund groups and supports over 200 million fund data requests each year, in over 35 languages.

## About Broadridge

Broadridge Financial Solutions (NYSE: BR), a global Fintech leader with more than \$5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance and communications to enable better financial lives. We deliver technology-driven solutions that drive business transformation for banks, broker-dealers, asset and wealth managers and public companies. Broadridge's infrastructure serves as a global communications hub enabling corporate governance by linking thousands of public companies and mutual funds to tens of millions of individual and institutional investors around the world. Our technology and operations platforms underpin the daily trading of more than U.S. \$9 trillion of equities, fixed income, and other securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 14,000 associates in 21 countries.

For more information about us and what we can do for you, please visit [www.broadridge.com](http://www.broadridge.com).

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