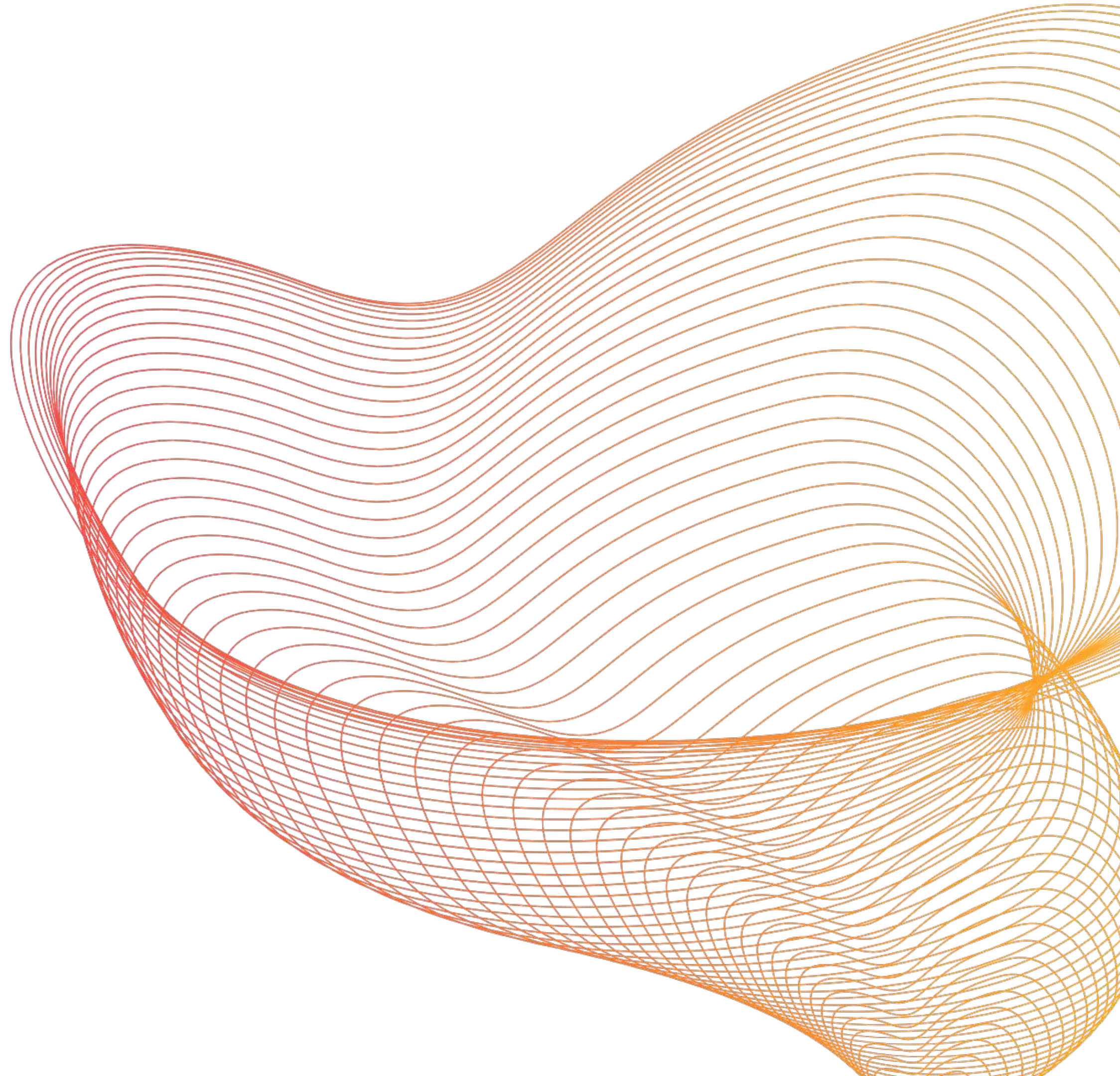


RIAA

Strategy

FY2026-29

3-year strategy



Our mission

RIAA works to promote, advocate for, and support approaches to responsible investment that align capital with achieving a healthy and sustainable society, environment and economy



Our journey so far

Formation of RIAA

by a group of investors and financial advisers keen to build an investment sector that supported ethical and sustainable finance.

Year 2000

Establishment of RI product labelling program

with the Responsible Investment Certification Program, that has grown to cover over 340 products that manage \$148,064 bill FUM as at the end of December 2023.

Year 2005

Benchmark report launch

since 2002 in Australia and 2008 in New Zealand to measure the sector's growth, dynamics, and performance.

Year 2002

RI Academy launched

the first online training course globally for responsible investment.

Year 2010

Global Sustainable Investment Alliance

was chaired by RIAA, convening global leading bodies to align global standards and definitions.

RIAA also played a key role in the NZ Sustainable Finance Forum Roadmap for Action

Year 2020

RIAA today

comprises over 500 members, including investment organisations and individuals. A\$76 trillion / NZ\$83 trillion in AUM.

RIAA membership represents 75% of all professionally managed funds in Australia and 73% in New Zealand.

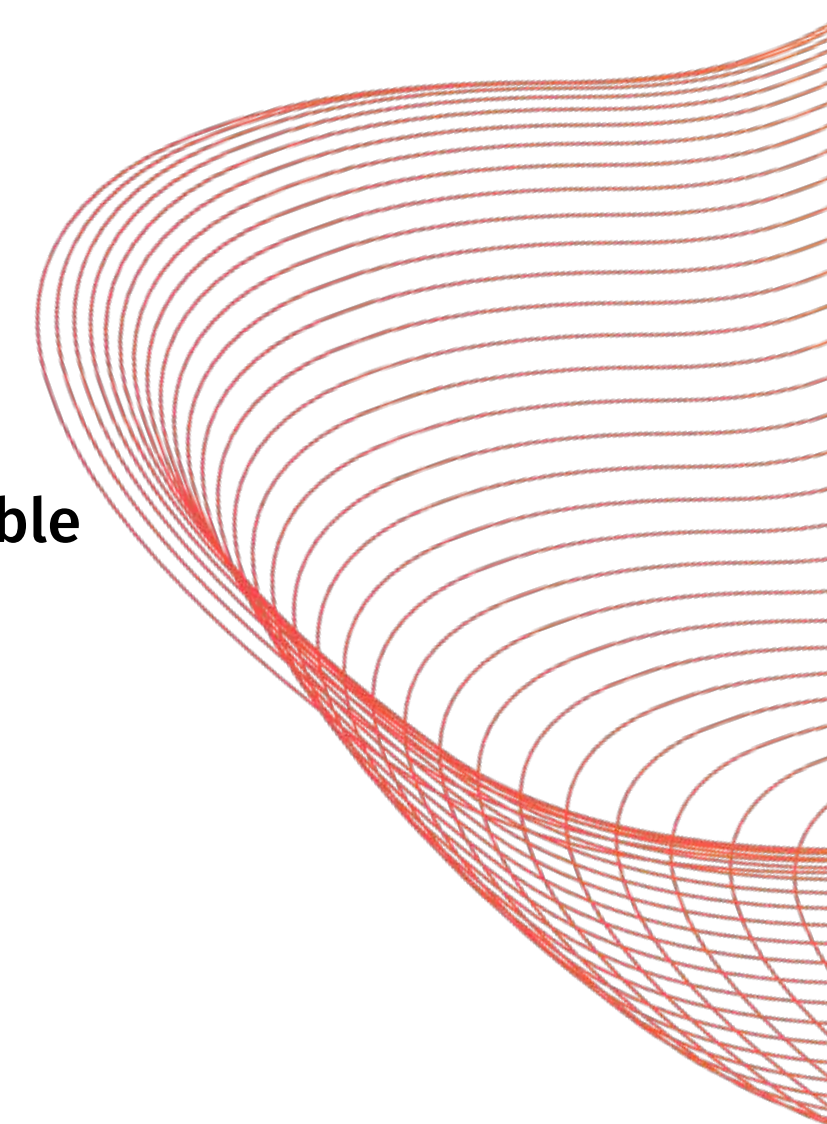
RIAA is made up of a professional and passionate team of 20 people across Australia and New Zealand.

Year 2024

Australian Sustainable Finance Institute established

RIAA CEO co-chaired the Australian Sustainable Finance Roadmap and established the Australian Sustainable Finance Institute (ASFI).

Year 2021

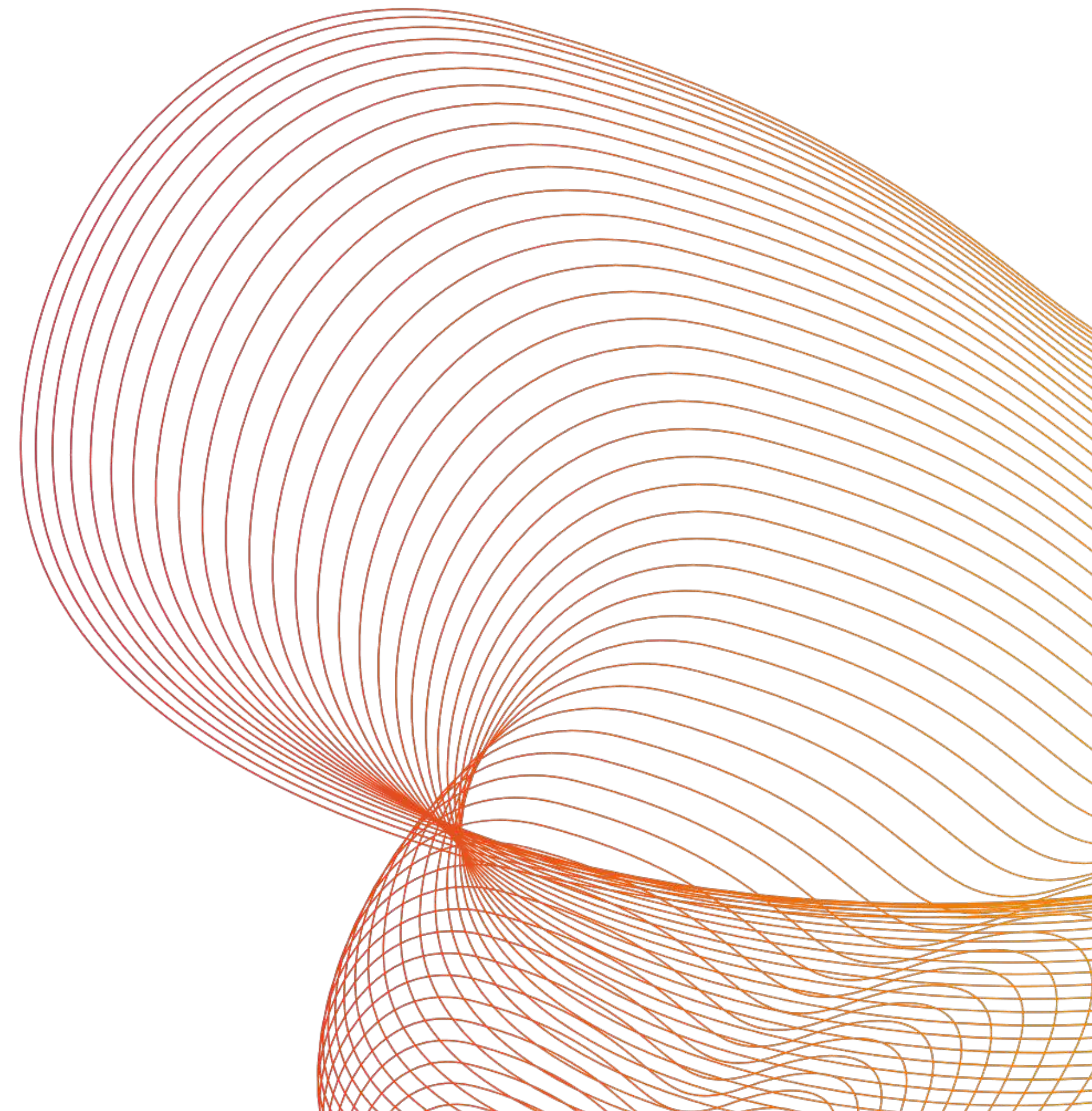


RIAA's 2026-29 strategy

We find ourselves in a period of significant evolution of the global investment landscape towards a more responsible and sustainable financial system, against the backdrop of criticisms of ESG globally, and economic and geopolitical uncertainty, that threaten to undo or undermine the significant progress that has been made.

RIAA's 25 years working to shift capital towards more sustainable practices, with membership covering 75% of managed funds in Australia and 73% in Aotearoa New Zealand positions RIAA at the forefront of harnessing momentum.

RIAA is pleased to present this 3-year strategy, an impactful roadmap to align capital with a sustainable and prosperous future.



Strategy on a Page: FY2026-29

RIAA works to promote, advocate for and support approaches to responsible investment that align capital with achieving a healthy and sustainable society, environment and economy.



Drive the standards of RI that deliver sustainability outcomes

RIAA strengthens the industry by articulating and driving leading practice.

RIAA's standards are incorporated into our [Responsible Investment Certification Program](#) as the preeminent labelling program in Australasia, embedded in our research program, advocacy work and Working Group resources.

RIAA's Certification Program elevates standards in responsible investing, aligns with regulatory expectations and mitigates greenwashing risks.

Key strategic activities

- Continue to strengthen and grow the Certification Program and Sustainability Classifications Initiative in our markets
- Ensure the Responsible Investment Standard is used as the basis for Australia's product labelling regime
- Review and deliver enhanced Benchmark and Super Study Reports with simplified methodology and survey



Advocate and influence the rapidly evolving policy environment

RIAA draws on our deep industry knowledge for [policy advocacy](#), seizing the opportunity to establish robust standards into law.

RIAA works across Australia and Aotearoa New Zealand to shape the rules of finance consistent with our mission.

RIAA collaborates to ensure consistency and quality in our local advocacy and to shape global developments that will impact our market.

Key strategic activities

- Shape the policy agenda in Australia and New Zealand
- Respond to evolving political and policy environment in support of responsible investment
- Support members to navigate criticisms of ESG
- Lead product labelling regulatory developments in our markets and partner with the Australian Government to deliver Australia's new regime



Deliver a strong, collaborative and valuable membership platform

RIAA is a hub of indispensable information, helping members to navigate this fast-evolving environment.

RIAA provides a platform for our members to actively participate and collaborate impactfully on critical sustainability issues, through our [working groups](#) and [events](#) including the RIAA conferences in Australasia.

RIAA convenes a strong and engaged community where members are profiled, inspired, learn, share, take action, build capability and stay on top of the issues that matter.

Key strategic activities

- Achieve successful integration with Impacting Investment Network NZ
- Run Working Groups with engaged members that deliver practical toolkits and lift practice
- Deliver the leading and largest responsible investment conferences in Australia and New Zealand for our sector
- Deliver events and communications that keep our members well informed and build capability
- Grow RIAA's Financial Adviser member base



Maintain a high performing, financially sustainable organisation and culture

RIAA must remain an agile and professional organisation with strong financial oversight to deliver our mission in a rapidly evolving external operating context.

RIAA focuses on ensuring we remain a strong team, an attractive place to work that rewards, recognises and retains great people, with all the requisite supportive organisational structures.

RIAA's organisational behaviour is guided by our mission and our values.

Key strategic activities

- Prudently manage our finances and human capital to best drive our mission
- Implement appropriate financial services license compliance structures and processes
- Deliver an enhancement of RIAA's digital platforms, including user experience, operational efficiency and security

Measuring impact

RIAA will deliver impact aligned to our mission, as measured by:

The building blocks of a mature and impactful responsible investment industry will land in the period of this strategy, and the role of RIAA has never been more important.

- Growth in assets managed under RIAA Certified funds
- Regulation and policy developments align with our mission and Standards
- RIAA membership remains strong with high retention
- RIAA has greater engagement and influence with financial advisers
- RIAA remains a great place to work, where staff see the impact they have on the mission
- RIAA's NZ structures are well-established and reach in NZ is amplified
- RIAA remains a financially sustainable organisation, with structures in place to effectively drive our mission

How RIAA achieves its mission

RIAA positions itself as an authority and a trusted voice and uses this to be a strong advocate for leading standards of RI to be embedded into industry standards and policy.

By shaping standards and influencing policy, this lifts the standards of RI across the wider industry, bringing RI into mainstream as the default.

As demand follows the leaders, the market is incentivised to lift standards, to gain certification and capital flows into strategies delivering sustainable outcomes in a manner aligned to our mission.

Strength comes
from our
members

Authority and
credible voice

Defining leading
practice and
shaping the market

Rising tide
lifts all boats

Drive
demand to
leaders

Race to the
top

RIAA provides a platform that keeps members connected and informed on the critical issues whilst providing forums for strong impactful collaborations.

RIAA puts our authority into practice, shaping what leading practice looks like in our certification and research programs, and advocates that in our policy work.

RIAA works to unlock and drive demand towards high quality RI strategies, helping to distinguish leaders in the market, through our Certification Program and research.

Contact us

Responsible Investment Association Australasia
Level 2, 696 Bourke St, Melbourne, VIC 3000, Australia
+61 3 7068 9456

info@responsibleinvestment.org

