

Ticker	Company	Date of engagement	Method of engagement	Key concerns/questions	Date of company response	Notes & responses	Follow-ups (if applicable)
ATP	Atlas Pearls	3-Jul-23	VC	Asked on community and environment	3-Jul-23	Community Community service programs Fed properly Wages that they should get paid in line with statutory obligations CSR / ESG obligations - frontrunning potential requirements Get some real kudos and value Other farms don't pay what they should Environment Boats have aged Need to clean up Efficient, leaner boats Old nets - pulverised and broken down to go into road base Pyrolysis machine / plant - solar, drive it to make biodiesel Oysters are natural water filterers	
COS	Cosol	6-Jul-23	VC	Asked about focus on sustainability	6-Jul-23	Strong in water and critical infra Moving away from centralised assets to de-centralised Strategic focus on decarbonisation projects	
EMN	Euro Manganese	7-Jul-23	VC	Any issues with the Environmental & Social Impact Assessment? Commercial arrangements linked to carbon	7-Jul-23	Limited - noise for nearby residents a sticking point but managing Operating in a brownfields area so further environmental disturbance is limited Offtakers requesting that pricing linked to CO2 intensity Majority of offtakers will be battery makers / OEMs Environmental Historical tailings Power plant has been dumping waste into the mine Derelict industrial space with a few small businesses Some soil samples taken Aside from where a petrol pump was it's very clean Reclamation project Lifetime benefit to water and soil Bring to Euro standards	
SHP	South Harz Potash	11-Jul-23	Face to face	Focus on ESG	11-Jul-23	Have made environmental hire in Germany to manage on behalf of the company Key focus in mining in European nations, particularly Germany	

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SBM	St Barbara	17-Jul-23	VC	Focus on diversity First nations engagement Carbon credits	17-Jul-23	Diversity has been a historical focus and SBM has performed well; diversity will continue to be strong post WA asset sale PNG workforce is 90%+ local community and nationals Generating carbon credits is something they are looking at but SBM has not actioned yet	
1AE	Aurora Energy	21-Jul-23	Face to face	Environmental management	21-Jul-23	Carrying out environmental studies for permitting now Need 12 months of biological information to ensure seasonality taken into account	
CG1	CarbonXT	27-Jul-23	VC	Uses of products	27-Jul-23	Removal of harmful chemicals (like Mercury) from dirty industrial processes Walter filtration is a big further opportunity and potential area for impact - potable water through low energy filtering	
NA	Envirada	28-Jul-23	Face to face	Impact of services	28-Jul-23	Company set up with goal and making a positive difference to the environment; particular focus on water management and conservation Flood management and warning systems a key focus area Water scarcity and increased flood risks make their work very important	
RXM	Rex Minerals	31-Jul-23	VC	Holistic ESG considerations in development of project	31-Jul-23	Soil is delapidated No issues with flow-off No flora and fauna in area Carbon intensity is low 40MW solar farm potential SA already has 70% renewables Could be a good hydro pump storage at end of mine life Strong community hiring and engagement School visits and other education potential	
AW1	American West	9-Feb-24	VC	Environmental and community impact of exploration activities	9-Feb-24	Confirmed no inhabitants, animals, vegetation etc. - frozen desert	

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WGX	Westgold	5-Mar-24	Face to face	Diversity in the mining industry and at WGX Approach to carbon	5-Mar-24	Capture new part of workspace Family comes first Health & wellness allowance, family/medical leave 12% female participation, 25% is aim Females are better underground – safer, always been known to be better UG New to industry, train them the right way Turnover has dropped 10% Diesel consumption under 3ML/mth, used to be 8.5ML/mth Hybrid UG gear 140 pieces of electronic gear for UG 5 hybrid loaders 2.5ML/mth is where they will end up Solar and gas potential at Fingal Not full electric gear at WGX's scale Large kit for UG is hybrid only, small can get full electric, medium getting there Clean Energy Transition Project Culture and staff retention Staff have strong motivation to stay with the launch of a new remuneration and benefits package. Believe this is a key pillar to the companies continued success and has the capability to give it an edge over competitors Attracted to the clean tech aspect	
SXE	Southern Cross Electrical Engineering	18-Mar-24	Face to face	Interest in the exposure to the electrification thematic and how they are positioning themselves and furthering the cause	18-Mar-24	Confirmation that there is a strong tailwind for the company through electrification, renewables/decarbonisation and digitisation Battery installations a key focus area	
WR1	Winsome Resources	27-Mar-24	VC	Environmental impact	27-Mar-24	3 classes Class 1, effectively untouchable Class 2, can get permission, but onerous Class 3 - most relevant to WR1 - don't technically need permits but you seek it anyhow	
SDV	Scidev	10-Jun-24	Face to face	Confirming that O&G exposure helps to make the sector cleaner Check in on PFAS (forever chemical) business	26-Jun-24	Re O&G exposure Solutions driver that is underpinned by technology Decontamination and less water used Less seismic events Less community impact Common thread across verticals - improvement to dirty industries; solving complex water issues Re PFAS Regulations dictate what and where they focus Cultural elements how they service Drinking water is a real issue Strong results on detection TAM for PFAS is massive	

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LGP	Little Green Pharma	3-Jul-24	VC	Blurry lines between medicinal cannabis and leisure-based	3-Jul-24	Discussed at Board level regularly Transition from oil (medical) to flower (more leisure) Some other competitors push boundaries and see themselves as recreational Doctor's decision in the end Recommend vaporisation, lowest risk Illicit recreational cannabis can be heavy on pesticides and other additives Whereas LGP is organic	
MEK	Meeka Metals	2-Sep-24	Email	Plans for minimising carbon emissions Reporting on carbon intensity Acknowledgement and some moves towards greater personnel diversity	2-Sep-24	•Plans for minimising carbon emissions This is principally driven by a focus on efficiency. As the business matures and balance sheet permits we will assess alternative opportunities to improve environmental outcomes. •Acknowledgement and some moves towards greater personnel diversity This is important to and recognised by the Company, please see attached Company policy document specific to this point, also available on our website	These responses were deemed unacceptable We divested all holdings
SXE	Southern Cross Electrical Engineering	10-Sep-24	Face to face	Check in on focus on electrification and decarbonisation	10-Sep-24	Looking at hydrogen; though small electrically in pilot plants - bigger contracts will come if green hydrogen gets off the ground Winning work through increased energy efficiency, rejuvenation and higher sustainability for buildings 3 battery projects	Continue to monitor as a key portfolio holding Electrification and data centre work increasing as % of revenue mix and focus