1 May 2024

Freedom of Information Request: 049/2024 University Investments

Dear Ms. Sullivan,

With reference to your request made under the Freedom of Information Act 2000, dated 5 April 2024, I can confirm the University holds the information requested and I am able to provide you with that information.

Your request, set out in full below, was for information relating to university investments.

Your request and our response:

In the below request, the phrase ‘arms trade companies’ relates to, but not limited to:

1.BAE systems
2. Babcock
3. QinetiQ
4. Rolls-Royce
5. Serco
6. Cobham
7. Raytheon
8. Airbus
9. General Dynamics
10. Leonardo MW
11. Lockheed Martin
12. Thales
13. MBDA
14. Elbit Systems

15. Caterpillar
16. MOD
17. DSTL
18. Atomic Weapons establishment
19. GKN
20. Boeing

Please may you provide:

1) Any investment made into an arms trade company, detailing the name of the arms trade company/organisation, amount invested, and type of investment (e.g. bonds, stocks and shares, capital etc.) of that financial year, for the past five financial years.

None. The University does not invest in arms trade companies, in accordance with our Investment Strategy and Policy

2) Any investment made into an arms trade company by the university endowment fund organised by name of company/organisation, amount invested of that financial year, for the past five financial years

None. University Endowment Funds do not invest in arms trade companies, in accordance with our Investment Strategy and Policy

3.) The name of any investment management firm or bank the university uses to make investments, and the amount given to them annually. If they do provide a list of the names of companies/organisations/investments they make on the university's behalf, please include any investments in arms trade companies provided by this information.

In the 2022/23 financial year the following investment firms were used:

Investment management firm	**Amount**
Kingswood	£25,406
Investec	£3,148

Neither made investments in arms trade companies on the University's behalf; this in accordance with our Investment Strategy and Policy.

If you are dissatisfied with how we have dealt with your request in the first instance, you may request an internal review within 40 working days of our response. Please make this request in writing, using the contact details below and explaining what you would like us to review.

By email to:
foi@roehampton.ac.uk
For the attention of: Rachel Tyler, Senior University Lawyer

Should you remain dissatisfied with the outcome you have a right under s50 of the Freedom of Information Act to appeal against the decision by contacting the Information Commissioner, Wycliffe House, Water Lane, Wilmslow SK9 5AF, or enquiries@ico.gsi.gov.uk

Any other future correspondence you may have with the University in relation to this matter should be sent to the Freedom of Information Officer at foi@roehampton.ac.uk

Yours sincerely,

Frank Jarman

Frank Jarman
Information Governance Manager
Governance & Legal Office

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