



.....

.....

Introduction

Loughborough University is an exempt charity and follows an Investment Policy which provides income for its current purposes and enhances income and capital growth over the longer term, thereby enabling the University's Governing Body to meet its current and future objectives in respect of institutional investment. These are as follows:

- To maximise total return on investments (capital and income) whilst containing risk to an acceptable level and maintaining a suitable profile of investments with regards to the possible need to fund future developments at the University.

Other Investments

The University and its subsidiary Loughborough University Enterprises Limited may make investments in wholly owned subsidiary companies, spin-out companies and other related parties including Loughborough Students' Union. Details are provided in the relevant body's annual financial statements.

Pension Scheme Investments

The pension schemes used by the University are constituted as separate corporate bodies with their own boards of trustees. Consequently, the schemes' funds are invested entirely separately from those of the University and the University has no direct influence over the investment portfolios of those schemes.

For the Universities Superannuation Scheme ("USS") a trustee board includes representatives nominated by Universities UK.

<https://www.uss.co.uk/about-us/how-were-governed>

For the Leicestershire Local Government Pension Scheme ("LGPS") there is a pension committee which comprises 5 Leicestershire County Councillors, 2 Leicester City Councillors, 2 District Councillors, 1 university representative (currently Loughborough University) and 3 employee representatives.

<https://democracy.leics.gov.uk/mgCommitteeDetails.aspx?ID=740>

Version control

Version	Date issued	Approved by	Comments
3.1	June 2024		