

Engagement Improvers Report



William G. Butterly, III
General Counsel, Director of
Sustainability and Engagement



Molly Clements
ESG Analyst



Jonathan Corning
ESG Analyst



Katie Zona
ESG Analyst

The Sustainability and Engagement Team identified the following issuers as having made significant ESG improvements consistent with our suggestions from previous engagement(s).

1. **Kodiak Gas Services, Inc. (ticker symbol KGS):** KGS operates contract compression infrastructure for customers in the oil and gas industry. We encouraged KGS to disclose the percentage of women and racial/ethnic minorities in the workforce and management annually following our research review in November 2023. KGS now discloses diversity data for employees and management.
2. **Chart Industries, Inc. (GTLS):** GTLS engages in the design, engineering, and manufacturing of process technologies and equipment for gas and liquid molecules. In March 2024, we encouraged GTLS to report employee training data. At the time, GTLS noted it was difficult to report this data due to the recent acquisition of Howden. However, they informed us of their intention to report training data in the future. GTLS reported employee training data in the 2024 sustainability report.
3. **Hillman Solutions Corp. (HLMN):** HLMN provides hardware-related products and related merchandising services. We have encouraged HLMN to eliminate the classified Board structure and the supermajority vote requirement since 2022. At the 2024 annual meeting, shareholders approved the management proposals to declassify the Board and eliminate the supermajority vote requirement. Additionally, we encouraged HLMN to report GHG emissions data during our 2024 engagement. In the most recent report, HLMN disclosed GHG emissions data for the first time.
4. **Carlyle Group Inc. (CG):** CG is an investment firm specializing in direct and fund of fund investments. For the past several years, we have encouraged CG to eliminate the classified Board structure. At the 2023 annual meeting, the management proposal to declassify the Board was approved.
5. **Atmus Filtration Technologies (ATMU):** ATMU makes filters and mechanical components. In 2024, we encouraged ATMU to eliminate its classified Board and to publish a sustainability report. ATMU eliminated its classified Board and published a sustainability report in 2025.
6. **Silergy Corp (6415-TW):** designs, manufactures, and sales of various integrated circuit products and related technical services. In 2024, the Team encouraged Silergy to increase the gender diversity and independence of the Board and to disclose supplier audits. Silergy did this in 2025.
7. **Prologis Property Mexico SA de CV (FIBRAPL14-MX):** FIBRAPL14-MX is a REIT in Mexico. We emailed FIBRAPL14-MX following research in September 2024 and encouraged FIBRAPL14-MX to adopt an independent Chair and describe employee development opportunities. The Board Chair is now independent and training opportunities are well described.
8. **Hammond Power Solutions Inc. (HPS.A-CA):** HPS.A-CA engages in the design, manufacture, and sale of various transformers. In September 2024, we emailed HPS.A.-CA

following research and encouraged HPS.A-CA to establish environmental targets. In the most recent report, HPS.A-CA had established and published environmental targets.

9. **Applied Materials (AMAT):** AMAT engages in the provision of manufacturing equipment, services, and software to the semiconductor, display, and related industries. We have been encouraging AMAT to disclose whistleblower line statistics since September 2022. In the most recent 2024 reprot, AMAT disclosed whistleblower statistics, specifically the total number of reports received.
10. **Cencora, Inc. (COR):** COR sources and distributes pharmaceutical products. In October 2024, we encouraged COR to adopt an independent Chair. As of 2025, COR has an independent Board Chair.

Index of Acronyms:

GHG: Greenhouse Gas

REIT: Real Estate Investment Trust

Disclosure

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