

Delivering for Our Members: Key Outcomes

- Achieved positive outcomes on proposed amendments to **AIF Rulebook** and **Finance Bill reforms** – ILP DWT exemption, Anti-Reverse Hybrid rules, and Dividend Participation Exemption – **enhancing Ireland’s private asset regime.**
- Broadened our advocacy to EU Commission on **Eligible Assets Directive (EAD) Review** and influenced EFAMA positions on Delegation, Supervision, and SFDR – **protecting the UCITS brand and reinforcing Ireland’s voice** in Europe.
- Saving money for our members** through simplification of **SFDR 2.0 disclosures**, a streamlined fund authorisation process **reducing approval times for 1,000+ funds** and phased rollout of the CBI’s Daily Investment Fund Return, **halving proposed fields for 7,000+ funds** to report daily.
- Advanced implementation of **flexible portfolio transparency framework for passive and active ETFs**, and ability to have **ETF shares classes in mutual funds.**
- Driving progress on regulatory reporting simplification – **advocating for EMIR 3.0 delay** and **shaping new reporting rules to ensure proportionality**, alignment with existing regimes, and **reduced burdens for members.**
- Secured **inclusion in Programme for Government** through extensive outreach (**100+ TDs**) and strengthened engagement and advocacy through **regional and financial literacy initiatives.**
- Delivered an **AI-powered Member Portal** – providing personalised insights and streamlined access to industry knowledge.

Advocacy in Numbers: Representing Your Views



Industry Leadership & Innovation: 2026 and Beyond

Enhancing Ireland’s Competitiveness: Strengthening the funds and asset management ecosystem by delivering products and structures for evolving investor needs, simplifying regulation, driving innovation, supporting SIU leadership, and ensuring the talent base keeps pace with evolving needs.

Leading on Private Assets: Timely implementation of AIFMD II and updated AIF Rulebook, combined with ELTIF 2.0 and recent tax reforms, to strengthen Ireland’s position as a leading hub for private asset strategies and drive increased capital flows.

Savings & Investments Union (SIU): Continue to protect the delegation model and UCITS brand, and advocate for an appropriate supervision framework as part of the Market Integration Package. Advocate to remove cross-border barriers.

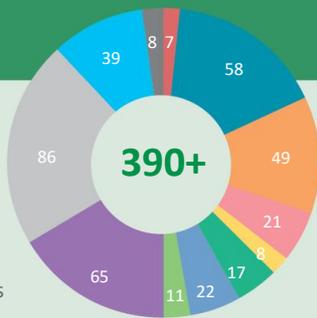
Tokenisation & Technology Innovation: Advance tokenisation readiness through thought leadership, domestic legislative and policy engagement, building on momentum from our tokenisation paper, CBI engagement and submissions to Government in 2025. Expand AI and tech insights via dedicated Emerging Tech speaker series and Member Portal.

Financial Literacy & Importance of Investing: The Irish Funds Transition Year Financial Literacy Programme has expanded and will be delivered this academic year in 30 schools across 18 counties, educating 900 students on managing money, investing, and life skills.

Fostering Inclusive Leadership Across the Industry: Champion gender balance in the industry through Ireland’s Women in Finance Charter, backed by Government, with 40+ member firms among 100+ signatories employing over 72,000 people.

Advocacy in Numbers: Stakeholder Meetings

- Central Bank of Ireland (CBI)
- Department of Finance
- European Commission
- EU & Global Policymakers
- EU Member States
- European Parliament
- National Politicians
- EFAMA
- EU / UK / Global Trade Associations
- Irish Trade Bodies
- Other Irish Gov’t Depts / Agencies
- UK Government & Policymakers



Working Group Participation: Collective Strength



41 Working Groups



770 Members Participating

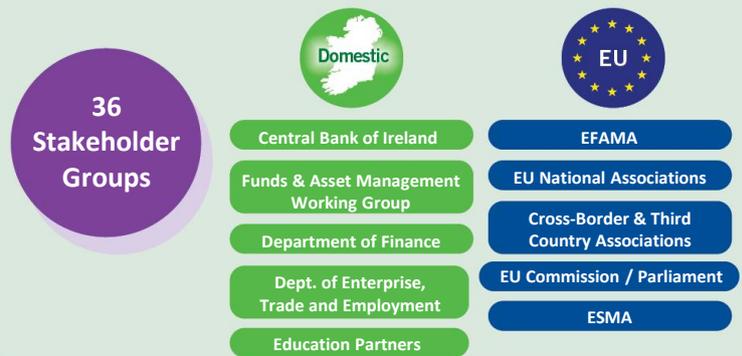


90% of Member Firms Participating



100+ Working Group Actions in Progress

Where Irish Funds Represents You: Maximising Your Reach



Professional Development, Training & Education

- 29** Training & Development Sessions
- 51** Hours of Training for Members
- 20** Podcasts & Playback Videos
- 65** Firms with 90 participants in Irish Funds Future Leaders Programme

Partnerships with IOB and IFS Skillnet

- Tech & Innovation
- Designated Persons
- Crypto Compliance
- Internal Audit
- Skills Framework Launch

Engagement, Promotion & Communication

