

isio.

born to be better.

Annual Results FY 2023.

Isio announces impressive annual results with acquisitions and strong organic growth.

Our financial year 2023

¹Isio's annualised revenue exceeded **£155m**



EBITDA of circa **£39m**



33% reported revenue growth to £135.3m



18% Organic revenue growth across our core business

Acquisition of Deloitte LLP UK pensions business

The acquisition strengthens Isio's core pensions advisory business enhancing capabilities in areas such as defined benefit consolidation and pensions transaction advisory services.

¹Isio group's annualised revenue of £135.3m for the year to 30 September 2023 includes only 4 months revenue from Isio Total Reward & Benefits Ltd that was acquired on 26 May 2023. On a full year basis Isio's annualised revenue is £155m.



Four years into our journey, we are perfectly placed to continue to capitalise on the scale, expertise and culture that we have built here at Isio. This is translating into clients and talented people approaching us as a fast growth challenger business they want to work with or for.

We are excited about our future and our strategy is to continue to build a market leading pension and benefits, investment and wealth planning consulting firm, known for thinking differently."

Andrew Coles, CEO, Isio

1,100 people across 10 UK offices

new **Belfast** location

200 new joiners with ITRB acquisition

In 2023, continued investment in our people

promoting **five** new partners



new **chief people officer**

Linda Johnston appointed

180

experienced hires joining the business

in addition we welcomed

70

graduate and apprentice trainees



people strategy launched

- Learning & Development
- Career paths
- Inclusion & Belonging strategy

over **1,000**

of our people completed an emergentics workshop



Delivering better outcomes for our clients through diversified, innovative offerings

Actuarial & Consulting

Pensions Administration

Investment

Reward & Benefits

Wealth Planning

Investing in initiatives

DB operational consolidation

Helping sponsors run their DB schemes efficiently, giving smaller schemes large scheme service.

Launched

isio.Private Capital

Leveraging our investment capabilities to provide an advisory service for family offices, charities and endowments.

Launched isio.Engage

Member engagement platform

i-FLO

Platform created for investors to transact on their illiquid assets, available to both Isio and non Isio clients.

Challenger brand in the market



Bold presence at the PLSA

Exhibition stand, client engagement and speaker slots at PLSA investment and annual conferences.



Thought leadership on attitudes to employee benefits

Series of papers revealing eye-opening insight into the UK workforce's attitudes towards work, finances, moving jobs and employee benefits.



Annual Fiduciary Management conference and report

At our second annual Fiduciary Management conference we shared new thought leadership on the latest trends in this market.



Recognised for Being Better by the Industry

Administration Provider of the Year 2023, Pensions Age

Investment Consultancy of the Year 2023, UK Pensions Awards

Women in Pensions Award

Professional Pensions Rising Star Award 2023

Named as one of the 2023 eprivateclient Top Investment Consultants

A commitment to being better



Diversity, Equity & Inclusion

Launched a multi-step I&B vision and strategy



Inclusive Employers Standard Bronze Accreditation 2023

Bronze status by Inclusive Employers

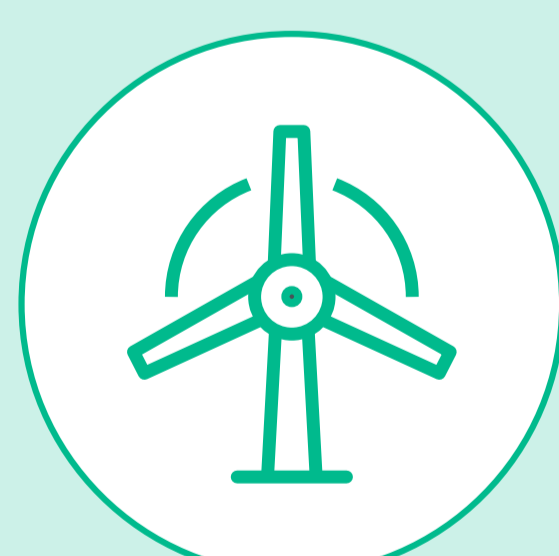


Giving back

1,600 volunteer hours

£77.3k

raised between our people and Isio matching since the start of our MyBnK partnership



Sustainability

A carbon neutral business since formation



Measure and publish our scope 1, 2 and 3 greenhouse gas emissions each year



Offices designed to operate energy-efficiently



Active promotion of the use of rail and public transport for personal and business travel

Electric car scheme for employees



Read our full press release at isio.com/news/results