

SOC 3[®] Report

Agile Analytics Pty Ltd

Examination Information	
<i>Company name</i>	Agile Analytics Pty Ltd
<i>Trading name</i>	Agile Insights
<i>Client file no.</i>	1724
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<i>Scope of Services</i>	Data, AI, and analytics consulting and managed services, including data platform modernisation, analytics solution delivery, AI solution delivery, managed support, training and enablement.
<i>Service auditor team</i>	Gajun Ganendran, Harry Khalili
<i>Examination standard</i>	International Standard on Assurance Engagements (ISAE) No. 3000, Description Criteria section 200, Trust Services Criteria section 100
<i>Report Type</i>	☐ SOC 2 [®] -Type1 ☐ SOC 2 [®] -Type2 ☒ SOC 3 [®] – For the period of 3 months, from 01/02/2026 to 30/04/2026
<i>Applicable Trust Service Criteria</i>	☒ Security ☐ Availability ☐ Processing integrity ☐ Confidentiality ☐ Privacy
<i>Examination period</i>	Start Date: 01/02/2026 End Date: 30/04/2026
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Assertion of Agile Insights Management

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Assertion of Agile Insights Management

We have prepared the accompanying description of Agile Analytics Pty Ltd's ("Agile Insights") system titled "Agile Insights Service Organisation's Description of the Agile Insights Service Delivery Environment" throughout the period 1 February 2026 to 30 April 2026 (the description), based on the criteria for a description of a service organisation's system in DC section 200, 2018 Description Criteria for a Description of a Service Organization's System in a SOC 2® Report (AICPA, Description Criteria) (the description criteria).

The description is intended to provide report users with information about the Agile Insights Service Delivery Environment that may be useful when assessing the risks arising from interactions with Agile Insights' system, particularly information about system controls that Agile Insights has designed, implemented, and operated to provide reasonable assurance that its service commitments and system requirements were achieved based on the trust services criteria relevant to security (the applicable trust services criteria) set forth in TSP section 100, 2017 Trust Services Criteria for Security, Availability, Processing Integrity, Confidentiality, and Privacy (AICPA, Trust Services Criteria).

Agile Insights uses subservice organisations, including Microsoft Azure, Microsoft 365 (including Microsoft Entra ID, SharePoint Online and Microsoft Teams), Microsoft Defender / Microsoft Sentinel, Azure DevOps / GitHub Enterprise, and CISO Online (in its capacity as managed security service provider), to support cloud hosting, identity and access management, collaboration, security monitoring and secure development activities within the system. Management has elected to use the carve-out method for these subservice organisations. The description indicates that complementary subservice organisation controls that are suitably designed and operating effectively are necessary, along with controls at Agile Insights, to achieve Agile Insights' service commitments and system requirements based on the applicable trust services criteria. The description presents Agile Insights' controls, the applicable trust services criteria, and the types of complementary subservice organisation controls assumed in the design of Agile Insights' controls. The description does not disclose the actual controls at the subservice organisations.

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The description indicates that complementary user entity controls that are suitably designed and operating effectively are necessary, along with controls at Agile Insights, to achieve Agile Insights' service commitments and system requirements based on the applicable trust services criteria. The description presents Agile Insights' controls, the applicable trust services criteria, and the complementary user entity controls assumed in the design of Agile Insights' controls.

We confirm, to the best of our knowledge and belief, that:

a. the description presents Agile Insights' system that was designed and implemented throughout the period 1 February 2026 to 30 April 2026, in accordance with the description criteria.

b. the controls stated in the description were suitably designed throughout the period 1 February 2026 to 30 April 2026, to provide reasonable assurance that Agile Insights' service commitments and system requirements would be achieved based on the applicable trust services criteria, if its controls operated effectively throughout that period, and if the subservice organisations applied the complementary controls assumed in the design of Agile Insights' controls throughout that period, and if user entities applied the complementary user entity controls assumed in the design of Agile Insights' controls throughout that period.

c. the controls stated in the description operated effectively throughout the period 1 February 2026 to 30 April 2026, to provide reasonable assurance that Agile Insights' service commitments and system requirements were achieved based on the applicable trust services criteria, if complementary subservice organisation controls assumed in the design of Agile Insights' controls operated effectively throughout that period, and if complementary user entity controls assumed in the design of Agile Insights' controls operated effectively throughout that period.

Signed for and on behalf of Agile Analytics Pty Ltd:

DocuSigned by:
Iman Eftekhari

Iman Eftekhari

Chief Executive Officer / Founder

Agile Analytics Pty Ltd

Date: 7/17/2026

Attachment A

Agile Insights' Description of the Boundaries of the Agile Insights Service Delivery Environment

Services Provided (Company Background)

Agile Analytics Pty Ltd, trading as Agile Insights ("Agile Insights" or "the Company"), is a professional services organisation that provides data, analytics, and artificial intelligence (AI) consulting and managed services to enterprise and government customers. The Company does not operate a multi-tenant Software-as-a-Service (SaaS) platform; instead, services are delivered through project-based engagements and ongoing managed service arrangements, typically within customer-controlled or dedicated cloud environments. Agile Insights' services are designed to support clients in achieving data-driven transformation through modern data platforms, advanced analytics, and AI capabilities, primarily leveraging the Microsoft Azure ecosystem and associated technologies.

This description details the boundaries of the Agile Insights Service Delivery Environment and the related infrastructure, software, people, procedures, and data that directly support the services provided to customers. The principal categories of services provided are: Consulting and Implementation Services (Project-Based); Managed Services (Recurring Services); Training and Enablement Services; Resource Augmentation (Staff Augmentation Services); Governance, Delivery, and Advisory Support.

Infrastructure

Agile Insights utilises a cloud-native, remote-first infrastructure model to deliver its services. The Company does not operate traditional on-premise data centre infrastructure and primarily relies on cloud-native platforms and managed endpoint technologies. Instead, services are delivered through secure cloud environments and managed endpoint devices. Key infrastructure components include:

Software

The software component consists of the applications, platforms, and tools used to design, develop, deliver, and support services. Provide its services and that directly support the services provided to customers, and the data that is processed by the system. Any infrastructure, software, people, procedures, and data that indirectly support the services provided to customers are not included within the boundaries of the system. The components that directly support the services provided to user entities are as follows:

Production Application	Business Function
Microsoft Azure (Synapse, Data Factory, Databricks, Storage, OpenAI)	Data integration, analytics, and AI solution delivery
Microsoft Fabric	Unified analytics and data platform
Power BI	Reporting, dashboards, and business intelligence
Microsoft Entra ID (Azure AD)	Identity and access management
Microsoft 365	Email, collaboration, and document management
Azure DevOps / GitHub Enterprise	Azure DevOps is the primary tool for source control, CI/CD, work item tracking and release management. GitHub Enterprise is used selectively where required by customer delivery environments.
Kantata	Project management, resourcing, time tracking and project delivery governance for internal use; does not host customer production data.
Employment Hero	Human Resource tool

Production Application	Business Function
Dynamics 365	Used for internal operational, customer relationship, engagement management and service delivery support activities. Customer production datasets are not centrally hosted within Agile Insights-managed Dynamics 365 environments.
Microsoft Defender / XDR / Microsoft Sentinel	Endpoint protection, security monitoring, SIEM logging, alerting, threat detection and security operations monitoring supported by CISO Online MSSP
Microsoft Purview Compliance Manager	SOC 2 Security assessment tracking, control mapping, improvement actions and compliance monitoring

PEOPLE

Agile Insights employs a combination of technical, operational, and corporate personnel to support service delivery. Key roles include:

Group/Role Name	Business Function
Executive Management	Strategic oversight, governance, and decision-making
Security and Compliance	Information security management, risk management, and policy enforcement
Delivery Managers	Oversight of project execution, quality, and client outcomes
Cloud Architects	Design of cloud and data platform architectures
Data Engineers	Development and maintenance of data pipelines and platforms
Analytics Consultants	Delivery of analytics, reporting, and BI solutions
AI Specialists	Development of AI solutions
IT Support	Internal IT operations and user support
Human Resources	Workforce management, onboarding, and training
Finance	Financial operations and reporting

Processes and Procedures

Agile Insights maintains documented policies and procedures to govern the operation of the system and support the achievement of service commitments. Key procedures include:

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DATA

Agile Insights processes and accesses various types of data in the course of delivering its services. However, as a professional services organisation, Agile Insights generally does not centrally host customer production datasets within internally managed corporate systems except where limited operational, support, collaboration, logging, troubleshooting, or project delivery information is required to support contracted services. Customer data remains under the control of the customer and is hosted within customer-managed systems (e.g., customer Azure tenants). Data accessed or processed by Agile Insights includes:

Production Application	Description	Data Store
Customer-managed Azure Data Platforms (e.g., Synapse, Databricks)	Client data, analytics datasets, and processed outputs accessed and processed by Agile Insights personnel	Customer-controlled Azure Storage / Data Lake
Power BI / Fabric (customer environments)	Reports, dashboards, and visualisations developed for clients	Customer Power BI Service / Fabric environments
Internal Systems (e.g., Microsoft 365)	Corporate data (HR, finance, communications, internal documentation)	SharePoint Online, Exchange Online, OneDrive, Dynamics 365

Attachment B

Principal Service Commitments and System Requirements

Agile Analytics Pty Ltd, trading as Agile Insights (“Agile Insights” or “the Company”), designs, implements, and operates its system to meet its service commitments to customers, business partners, and other stakeholders. These commitments are established through contractual agreements, including Master Service Agreements (MSAs), Statements of Work (SoWs), and, where relevant to contracted services, Service Level Agreements (SLAs), as well as through internal policies, procedures, and standards aligned with the Company’s Information Security Management System (ISMS).

Service commitments are supported by defined system requirements, which specify how the system is designed and operated to achieve those commitments in accordance with the applicable Trust Services Criteria.

Agile Insights’ principal service commitments for the Security Trust Services Criteria include the following:

1. Security of systems and information

Agile Insights is committed to protecting company systems, customer information accessed during service delivery, and service delivery processes against unauthorised access, unauthorised disclosure, misuse, alteration, and disruption.

2. Secure customer environment access

Agile Insights is committed to accessing customer-controlled environments only through customer-approved access methods and for authorised project, support, monitoring or service delivery purposes.

3. Secure handling of confidential and customer information

Agile Insights is committed to protecting confidential information, including customer project information, internal business information, credentials, technical documentation and other information handled as part of contracted services.

4. Compliance with security-related legal, regulatory and contractual obligations

Agile Insights is committed to meeting applicable security-related contractual obligations and relevant legal and regulatory requirements, including requirements relating to secure handling of customer and personal information.

To achieve the above service commitments, Agile Insights has established system requirements supported by policies, procedures, and technical controls, including the following: System requirements are defined across the following domains: Access Control and Identity Management; Data Protection and Encryption; System Monitoring and Incident Response; Change Management and Secure Development; Operational Resilience Supporting Security; Risk Management; Vendor and Third-Party Management; Employee Lifecycle and Security Awareness.

Independent Service Auditor's SOC 3 Report

Management of Agile Analytics Pty Ltd trading as Agile Insights

Scope

We have examined Agile Analytics Pty Ltd's ("Agile Insights") accompanying assertion titled "Assertion of Agile Insights Management" (assertion) that the controls within the Agile Insights Service Delivery Environment (system) were effective throughout the period 1 February 2026 to 30 April 2026, to provide reasonable assurance that Agile Insights' service commitments and system requirements were achieved based on the trust services criteria relevant to **security** (applicable trust services criteria) set forth in TSP section 100, 2017 Trust Services Criteria for Security, Availability, Processing Integrity, Confidentiality, and Privacy (AICPA, Trust Services Criteria).

Service Organisation's Responsibilities

Agile Insights is responsible for its service commitments and system requirements and for designing, implementing, and operating effective controls within the system to provide reasonable assurance that Agile Insights' service commitments and system requirements were achieved. Agile Insights has also provided the accompanying assertion about the effectiveness of controls within the system. When preparing its assertion, Agile Insights is responsible for selecting, and identifying in its assertion, the applicable trust services criteria and for having a reasonable basis for its assertion by performing an assessment of the effectiveness of the controls within the system.

Our Responsibilities

Our responsibility is to express an opinion, based on our examination, on management's assertion that controls within the system were effective throughout the period to provide reasonable assurance that the service organisation's service commitments and system requirements were achieved based on the applicable trust services criteria. Our examination was conducted in accordance with International Standard on Assurance Engagements 3000 (Revised), Assurance Engagements Other Than Audits or Reviews of Historical Financial Information, issued by the International Auditing and Assurance Standards Board. Those standards require that we plan and perform our examination to obtain reasonable assurance about whether management's assertion is fairly stated, in all material respects. We believe that the evidence we obtained is sufficient and appropriate to provide a reasonable basis for our opinion.

We are required to be independent and to meet our other ethical responsibilities in accordance with relevant ethical requirements relating to the engagement.

Our examination included the following:

- Obtaining an understanding of the system and the service organisation's service commitments and system requirements
- Assessing the risks that controls were not effective to achieve Agile Insights' service commitments and system requirements based on the applicable trust services criteria.
- Performing procedures to obtain evidence about whether controls within the system were effective to achieve Agile Insights' service commitments and system requirements based on the applicable trust services criteria.

Our examination also included performing such other procedures as we considered necessary in the circumstances.

Inherent Limitations

There are inherent limitations in the effectiveness of any system of internal control, including the possibility of human error and the circumvention of controls.

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Because of their nature, controls may not always operate effectively to provide reasonable assurance that the service organisation's service commitments and system requirements were achieved based on the applicable trust services criteria. Also, the projection to the future of any conclusions about the effectiveness of controls is subject to the risk that controls may become inadequate because of changes in conditions or that the degree of compliance with the policies or procedures may deteriorate.

Opinion

In our opinion, management's assertion that the controls within the Agile Insights Service Delivery Environment were effective throughout the period 1 February 2026 to 30 April 2026, to provide reasonable assurance that Agile Insights' service commitments and system requirements were achieved based on the applicable trust services criteria is fairly stated, in all material respects.

Gajun Ganendran
Information Security Lead Auditor

Harry Khalili
CA, AICPA International Associate

Mousa Sharifi
Director, AICPA Affiliate Member

G. Ganendran

Harry Khalili

M. Sharifi

20/07/2026

22/07/2026

24/07/2026

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