

EU REGULATORY DATA SFDR REPORTING

Impact Cubed data is designed to simplify investor compliance and reporting on Principal Adverse Impact (PAI) indicators for the EU Sustainable Finance Disclosure Regulation (SFDR) and the EU Taxonomy requirements. Complete coverage for all listed equities and sovereign issuers, coupled with the analytical rigor of Impact Cubed’s quantitative factor-based models make us the ideal compliance partner for off the shelf or bespoke regulatory solutions.



PORTFOLIO REPORTS

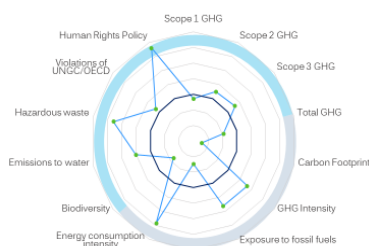
Simplify and streamline compliance reporting with ready-made PAI reports

- On-demand reports or customized solutions available through our managed service
- Portfolio data for current year and previous year
- Entity and fund level reports

Indicators applicable to investment in transition companies						
Adverse sustainability indicator	Metric	Impact (Scale 1-4)	Impact (Scale 1-4)	Exclusion	Adverse impact	
CLIMATE AND OTHER ENVIRONMENT-RELATED INDICATORS						
Greenhouse gas emissions	1. GHG emissions	Scope 1 GHG emissions				
		Scope 2 GHG emissions				
		Scope 3 GHG emissions				
		Total GHG emissions				
Carbon footprint	Carbon footprint	Carbon footprint				
Biodiversity	Biodiversity	Biodiversity				
Pollution	Pollution	Pollution				
Circular economy	Circular economy	Circular economy				
Water	Water	Water				
Waste	Waste	Waste				

Unlock performance insights with portfolio analytics

- Compare portfolio performance to benchmark or peers
- Article 8/9 fund level reporting on sustainability objectives and climate risks



DATA

Robust data on PAI indicators for integration into reporting platforms, due diligence, or investment processes

- Full transparency into underlying data and methodologies
- Disclosure flags and PAI estimations available from Impact Cubed’s industry-leading models

Comprehensive coverage of PAI indicators

- 14 mandatory corporate PAIs; 2 mandatory sovereign PAIs; 2 mandatory real estate PAIs
- Optional PAIs available

Complementary datasets available for the EU Taxonomy and “do no significant harm” provisions

Unrivalled Securities Coverage



40,000+ companies, all globally listed equities available on demand



190 countries, including all sovereign debt issuers



The SFDR, published in December 2019, imposes transparency and disclosure requirements on the way sustainability risks are considered in the investment decision-making and advisory process. In addition to qualitative disclosures in product documents and marketing materials, firms are required to periodically report on the quantitative impact of their investments. Impact Cubed’s objective, factor-based approach to ESG and impact measurement was inherently aligned with the regulatory requirements, allowing us to create scalable and customizable solutions for our clients. Developed through consultation with leading investors, **Impact Cubed’s** purpose-built solution simplifies SFDR reporting requirements and unlocks insights into sustainability performance.



REPORTING & BENCHMARKING

Entity-level and periodic product reporting for SFDR compliance as well as Article 8/9 risk or impact reporting. Benchmark performance to indexes or peers.



SECURITY SELECTION

Quantitative, factual data for identifying and managing risk or impact as part of the investment decision-making process.



PORTFOLIO SCREENING

Screen securities that do not meet standards or criteria to create compliant investment universes.



ENGAGEMENT WITH ISSUERS OR MANAGERS

Engage with issuers or evaluate fund manager strategies based on objective measures of risk and impact.

ABOUT IMPACT CUBED

Impact Cubed provides ESG analytics and investment solutions for building more sustainable portfolios with greater impact. It combines an award-winning approach to integrating impact into risk and return with technology-enhanced portfolio design and management. The outcome is a seamless approach to customized sustainable investing.

CONTACT US

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