

Impact-Cubed

Portfolio Impact Footprint for Asset Owners



YOUR ESG OBJECTIVES

MANAGER SELECTION & MONITORING

Third-party assessment to inform manager selection, and for ongoing monitoring and engagement with external managers on the sustainability of your investments



TOTAL PORTFOLIO REPORTING

Measure the net sustainability profile of the totality of your direct and fund investments across environmental, social, governance, and SDG-alignment dimensions.



Includes a complete set of impact metrics across **environmental, social, governance, and SDG aligned products & services** at the level of individual securities, funds, and total portfolios



DATA & GRAPHS for clear comparison

Easily rank and compare funds on overall performance and individual metrics with transparent and verifiable data on outcomes independent from the manager's own views and marketing

KEY METRICS COVERED

Monitor and easily report on objective, quantitative metrics such as carbon / waste / water efficiency, tax gap, or executive pay ratios

CUSTOM DATA & REPORTING

Ask us to custom-fit our model and data to your exact needs

- drill down into specific issues e.g. more detail on revenue streams from environmental and social good
- custom weightings applied to indicators in the model relevant to a specific mandate's objectives or your organization's focus
- modify, add or remove impact measures



Impact-Cubed links your portfolio's sustainability and impact to the **UN Sustainable Development Goals** to help with SDG-specific goal setting and reporting.

Our products & services SDG alignment measures cover both helpful and harmful categories broken out separately, and take into account the geographic exposure of investments in the spirit of SDGs.



WASTE EFFICIENCY, WATER EFFICIENCY, AVOIDING WATER SCARCITY



CARBON EFFICIENCY, ENVIRONMENTAL GOOD, AVOIDING ENVIRONMENTAL HARM, AVOIDING WATER SCARCITY, TAX GAP

MANAGING SUSTAINABILITY WITH



The status quo of sustainability reporting for Asset Owners:



As an Asset Owner you likely meet some challenges in obtaining meaningful insights into the sustainability and impact characteristics of your investments. Perhaps you receive reporting from external managers each using different providers' research and ratings combined with the manager's own narrative.



These insights and ratings are wholly or in part qualitative in nature and require a large time investment to produce. **Data availability and resource constraints** limit the viability of applying this approach to an entire investment universe.

As a result you only have sustainability information on part of your investments, often **leaving out small cap and emerging markets holdings that carry a lot of importance in sustainability and impact terms.**



For the investments that are covered, reporting may be based on different providers' methodologies that work on different criteria, making it **impossible to compare** the outcomes across managers. The **complexity and lack of transparency** of proprietary ratings methodologies further impair the asset owner's ability to evaluate and verify such reporting.

Impact-Cubed REDRESSES THE INFORMATION BALANCE IN FAVOUR OF ASSET OWNERS by:



- producing **data-driven impact metrics for all public assets**, including small caps and even frontier markets, so that you get a complete picture of your portfolio impact



- providing you with a **clear and concise** assessment of any portfolio that is comparable across managers and easily integrated into an Asset Owner total portfolio report

- Maintaining the **highest standards of objectivity and transparency**, meaning that you don't have to buy and study any proprietary research methodology to understand our analysis



Email us at am@impact-cubed.com to find out more. We will be happy to hear from you



If you'd rather try it out by yourself first, register at www.impact-cubed.com for access to a free version of the Impact-Cubed model

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