

Impact Cubed opens market consultation on reporting portfolio impact for individuals

Investors seek new practical ways to report on impact that are friendly to individual investors and family offices, yet sufficiently robust to fend off greenwashing concerns and satisfy regulations to document customer sustainability preferences.

London, July 5, 2022- Impact Cubed today opens a market consultation on new ways of reporting on impact that are friendly to individual investors who are served by wealth managers and family offices.

According to UBS Family Office Report 2022, over half of family offices made sustainable investments in 2021 and are motivated by creating a positive impact on the environment and society. Unlike many institutional investors whose narrow focus is avoiding financially material ESG risks, family offices and individual investors are also interested in companies directly impacting real world issues, like lowering carbon emissions or providing renewable energy.

As the market has been swept by a surge of interest in sustainable investing, investors have stepped up their due diligence of funds to avoid concerns about greenwashing. In Europe, investors are also now tasked with considering and documenting customer sustainability preferences as part of new MiFID II rules that come into effect in 2022.

"Investors want to know what they are financing with their portfolios, and they want to have a positive impact with their investments," said Libby Bernick, CEO at Impact Cubed. "Impact Cubed's goal is to create practical, accessible tools for communicating impact to investors, using factual data that matches their sustainability preferences and stands up to greenwashing due diligence."

Historically, investing for positive impact was primarily limited to private equity investments. Impact Cubed pioneered impact reporting for listed portfolios with the 2017 launch of its tool for institutional investors. The factual, data-led approach won industry awards for innovative thought leadership and today is used by fund managers to substantiate ESG marketing claims, thereby avoiding greenwashing concerns. Since that initial launch, investors whose end clients are not institutional have repeatedly expressed the need for portfolio and fund impact reporting tools that are accessible and engaging in a way uniquely suited to their audience.

The consultation, done via structured one on one video calls, will run from July 5 through 15th. Space is limited to 20 investors, who will be provided with extended trial access to the tools and discounted licenses.

For more information or to participate in the consultation, please contact info@impact-cubed.com.

About Impact Cubed: Impact Cubed provides 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.

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