

## ESG

### Sustainability technology kit powered by artificial intelligence



**Ensures regulatory compliance:** It incorporates all the information needed to ensure compliance with the relevant regulatory frameworks (SFDR, European Union taxonomy and MiFID II).



**Adapts the product offering to sustainability preferences:** Thanks to SFDR and EU taxonomy, the advice flows incorporate all the controls needed to automatically ensure your customers' preferences.



**Incorporates all the ESG information into the reports and proposal:** The generated portfolio reports and investment proposals include complete analysis of ESG risks, climate impacts and compliance with the UN Sustainable Development Goals (SDGs).



**Offers up to 13 times the coverage of the competitors:** It includes up to 50,000 companies, more than 360,000 funds, 198 countries, 199 local governments and 46 principal adverse impact (PAI) indicators.

## Functions of the solution



### IT INCORPORATES SUSTAINABILITY INTO MANAGER WORK FLOWS

It covers everything from generating reports and portfolio analysis to the suitability test and preparing investment proposals in line with their customers' preferences.



### ASSESSES ESG RISKS OF INVESTMENTS

It has internal methodologies for measuring risk based on international standards (SASB) with the ability to incorporate the vision of each entity.



### ANALYSES INVESTMENTS BASED ON CLIMATE REGULATIONS

It offers 25 climate metrics for more than 30,000 companies, which allows investors to make investment decisions in line with internationally recognised climate regulations and frameworks (Paris Agreement, TCFD, SBTi, Net Zero).



### RATES THE IMPACT OF INVESTMENTS ON UN SDGS

It offers 60 impact metrics to measure their contribution to these goals and specific targets.



### SIMPLIFIES REGULATORY COMPLIANCE PROCESSES

It allows ESG reports to be generated based on SFDR requirements. It also evaluates activities based on their environmental contribution, significant harm (DNSH) and minimum social guarantees. It facilitates the integration of sustainability criteria into the new suitability tests outlined by MiFID II.



### DIRECTS CAPITAL TO PROJECTS WITH A POSITIVE IMPACT

It allows clients to be informed of how they contribute to the most important ESG challenges for the company and to recommend products with a positive impact.

## Advantages for business

- 1 It increases advisor experience and specialisation in sustainability:** The sustainability information provided at the fund and company level empowers advisors to offer a higher quality service with greater global satisfaction.
- 2 It helps to maximise the social impact of their investments and the risk/return ratio:** The quantified impact assessment capacities allow the risk/return ratio to be balanced with social impact.
- 3 It provides a robust technology kit:** Even though the information provided is complex, it is presented in a visual format that allows all audiences to access and understand it.
- 4 It implements scientific, evidence-based methodologies:** It has a global team of experts in sustainability, research and data science that work on innovating, creating, implementing and maintaining the solution.
- 5 Driven by powerful and scalable AI:** It uses automatic learning to assess over 2 million sources of data and perform reliability cross-checks.
- 6 It offers the greatest coverage and quality of data:** Thanks to the technology and methodologies implemented by Clarity AI, it is able to provide the most complete, reliable and transparent information in the market with the widest scope.

## Our solution

