



# ESG Peer performance assessment & benchmarking for a leading institutional investor

## Client

A leading institutional investor.

## Business Situation

The research required a holistic assessment of ESG integration levels in the asset management of institutional investors. The client wanted to understand their market position compared to its top sector peers by way of understanding not just the performance projected and reported by the concerned parties, but also the public sentiment that their commitment to ESG warranted.

## Engagement

A holistic peer performance assessment and benchmarking to understand levels of ESG integration in the asset management process.

## SGA Approach

- As-is analysis of public disclosure of peers to identify ESG management processes for their portfolios.
- Ensured adherence and commitment toward ESG management by assessing screening criteria, implementation plans, evaluation parameters, and engagement strategies.
- Understood the peer group's adherence to sustainable investing standards and approach toward impact investing initiatives.
- Identified ESG priorities and focus areas for each of the peer investors.
- Assessed avenues of public disclosure utilized by the peer group to showcase their commitment to ESG integration.
- Identified peers paying focused attention to mitigate and adapt to climate change factors.

- Analyzed public perception and sentiment regarding ESG management and integration for the institutionalized asset management process of peers.
- Understood public sentiment for institutional investors as a function of their engagement strategies via social media, company website, newsletters, press conferences, and webinars.
- Quantified the degree of positivity or negativity observed in the perception of the public for each of the peer group via verified media and published sources.
- Identified high-level strategies to arrive at opportunities for improvement and growth.

## Benefits and Outcomes of Our Engagement

- Enhanced ESG integration and management methods.
- Identified upcoming ESG priorities among the peer group based on changing landscapes in each of the industry portfolios.
- Monitored external collaborations through boosting, verifying, and certifying ESG performance.

## Key Takeaways

- Holistic analysis for asset managers and institutional investors, highlighting gaps in their ESG management and integration processes.
- Performance review of peers on major parameters defining ESG integration.
- Structured insights to address shortfalls and disconnect in public reporting.
- Holistic overview of best performing peers across assessment parameters used for the research.

To know more about our ESG Consulting Services  
write to us on [esg@sganalytics.com](mailto:esg@sganalytics.com) or  
contact us on **+1 315 503 4760**