



ESG management for a top institutional investor

Client

A leading institutional investor.

Business Situation

The project required a detailed assessment of the ESG profiles of 150 asset managers and a summarized commentary on each of their profiles. The research was to be defined across 6 focused profile sections, which would enable the preparation of the ESG profile commentary.

Engagement

A profile commentary for 150 asset managers highlighting and tracking key factors of ESG integration in their asset management.

SGA Approach

- Assessed asset managers on holistic ESG integration aspects sourced from various channels such as UNPRI website, annual reports, proxy statements, newsletters, investor resources, and company websites.
- Evaluated UNPRI profile on the basis of years of engagement, attributed scores, and listed equity funds.
- Highlighted key aspects of responsible investing such as ESG engagement percentages, ESG trends, and ESG rating frequency for 150 asset managers.
- Assessed a wide variety of data ratings used by asset managers such as RobecoSAM, S&P Trucost, Vigeo Eiris, etc. to identify performance of portfolio companies.

- Identified priority focus areas listed by asset managers across the environmental, social, and governance pillars.
- Alignment of asset managers to 20 globally accepted frameworks and guidelines such as CERES, SASB, Climate Action 100+, UNGC, CDP, and CII, to name a few.
- Scraped news and controversies highlighting major milestones and events reported by both self and third-part media sources for the asset managers.
- Formulated a summarized ESG profile for each asset manager based on the 6 major profile sections identified for research.

Benefits and Outcomes of Our Engagement

- Oversight into emerging ESG priorities of asset managers.
- Assessed asset manager's alignment with globally accepted frameworks and initiatives.
- Consciously monitored news headlines and controversies involving the designated asset management organization.

Key Takeaways

- Holistic overview of customized ESG profiles for 150 asset managers.
- System-digestible frameworks for allowing easy analysis and interpretation.
- Summarized analysis including inferences from reported parameters as well as news headlines and controversies collected from verified public sources.

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