ESG Data Analytics

Growing Sustainable Investments with Clarity

BNY MELLON

Consider Everything

Solve the data challenge. *Seize the ESG opportunity.*

The ever-increasing demand for greater customization of ESG portfolios combined with the growing number of regulatory standards are resulting in a data challenge for the investment industry.
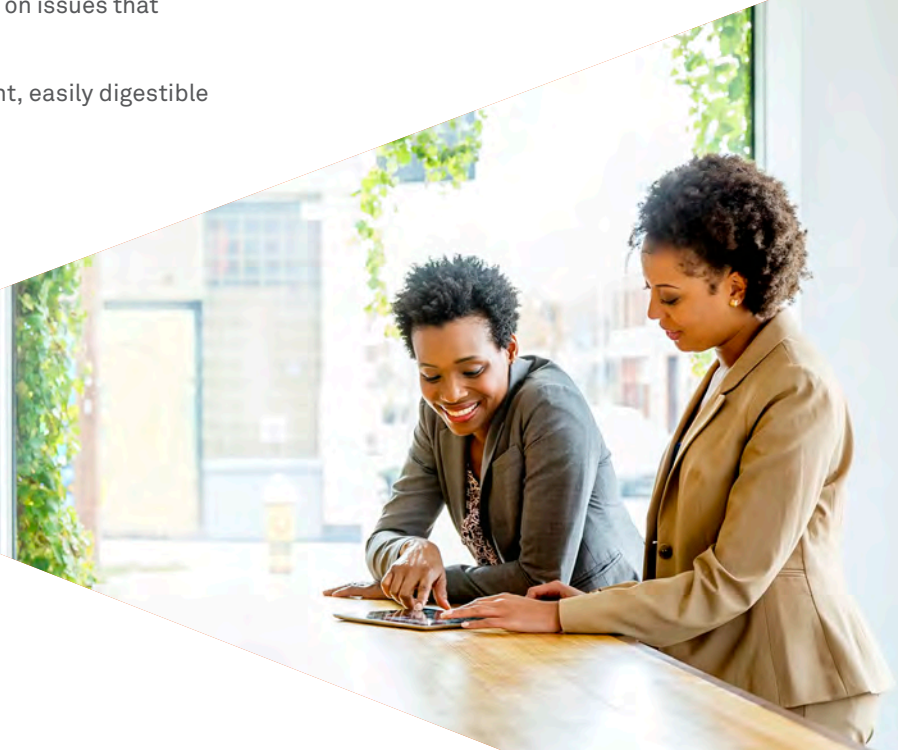
Despite the massive amount of ESG data now available, investors are struggling to align portfolios with specific and varied sustainability and performance goals and to fulfill the reporting requirements of multiple stakeholders. Generated by a multitude of sources, much of this data is conflicting and difficult to compare. These challenges are only intensifying as investors continue to look for more granular, timely and forward-looking data to generate alpha.

Increase data's transparency.
Extract its value.

From investment policy development and portfolio management to monitoring and reporting, BNY Mellon ESG Data Analytics enables you to extract value from the data to meet your specific needs.

A dynamic, cloud-based application, ESG Data Analytics enables you to:

- **Access a unified view** of cleansed and normalized traditional and alternative ESG data from public, private and vendor sources, along with your own research, to help make better investment decisions

- **Explore, customize and validate portfolios** based on specific and varied sustainability and performance goals by using its dynamic mapping tools and what-if analysis

- **Compare and evaluate data across vendors and taxonomies** to manage, measure and monitor sustainable investments and their impact on portfolios

- **Obtain a deeper understanding of industry practices and your peers' views and preferences** regarding data across sources by using our crowdsourcing metrics

- **Measure and report on ESG investment outcomes** to stakeholders and regulators, such as those for meeting the requirements of the Task Force on Climate-Related Financial Disclosures (TCFD) and Sustainable Finance Disclosure Regulation (SFDR).

- **Monitor and report on engagement** with companies on issues that matter to you

- **Drive operational efficiency** by delivering consistent, easily digestible ESG data across your organization.

Transform data into insight.
Customize and optimize portfolios.

Our patent-pending dynamic mapping engine, crowdsourcing metrics, and what-if analyses with natural language programming connect the data in ways that enrich your decision-making process. From marking what is on trend to determining whether you're tracking the correct metrics, you can align investments across multiple asset classes and construct portfolios that support specific sustainability goals and investment preferences.

DYNAMIC MAPPING WITH NATURAL LANGUAGE PROGRAMMING
With just a few clicks, mix and match data using combinations of exclusion, inclusion and impact priorities to customize portfolios that align best with specific goals, risk tolerances and preferences.

United Nations - SDG	BNYM - ESG Common Taxonomy	Vendor A
☐ Climate Action	▼ ☐ BNYM - Common Taxonomy	▼ ☐ Integration of Environmental Issues
☐ Responsible Consumption and Production	▼ ☐ Environment	☐ Environmental Strategy
☐ Reduced Inequalities	▼ ☐ Innovation	☐ Pollution Prevention
☐ Industry, Innovation and Infrastructure	☐ Product Innovation	☐ Green Products
☐ Decent Work and Economic Growth	☐ Strategy	☐ Biodiversity
☑ Affordable and Clean Energy	▼ ☐ Climate Change	▼ ☐ Environmental Considerations
☐ Clean Water and Sanitation	☐ Pollution (Emissions)	☐ Environmental Impacts
☐ Gender Equality	☐ Pollution (Energy)	☐ Clean Tech
☐ Quality Education	☐ Pollution (General)	

The **Dynamic Mapper's Search Source Functionality** allows you to select all or a few source types, including *Taxonomies, Open Source, Vendor Research, ESG Rating/Score Providers, Carbon Metrics, and Climate Risk Metrics.*

CROWDSOURCED DATA
Gain a better understanding of industry practices and standards. Assess how other investors and clients view and use ESG data across various sources and taxonomies with our crowdsourcing metrics, which aggregate and anonymize the data.

Factor	Vendor	Crowdsource Response	Completeness	Action
Corporate Governance Domain Score	Vendor A	80/20/0		➕ ❌ ➖
Board of Directors Sub-Domain Score	Vendor B	69.31/20.79/9/9		➕ ❌ ➖
Responsible Board Organization and Practices	Vendor C	77.14/14.29/8.57	100	➕ ❌ ➖
				➕

WHAT-IF ANALYSES
Examine the impact a change in tolerance levels to specific factors—such as lack of biodiversity—would have on a portfolio's sustainability profile, risk and performance.

Factor	Threshhold		
☑ Board		64	100
☑ Human Capital Development		26	100
☑ Career Development and the Promotion ...		23	100

Overview | Analytics

Benchmark	Portfolio	My List
2.10% Responsible Equity	2.2% Active Impact	2.10% Active Impact

	Benchmark	Portfolio	My List
Security Count %	56% / 41% / 3% / Total	86% / 14% / 0% / Total	56% / 41% / 2.2% / Total
Security Count	26 / 19 / 1 / 0	40 / 7 / 0 / 0	26 / 19 / 1 / 0
Absolute Return	↑12 / ↑0.9 / -0 / -0	↑1.9 / ↑0.3 / -0 / -0	↑12 / ↑0.9 / -0 / -0
Alpha to Benchmark	↑0.5 / ↑0.4 / -0 / -0	↑0.8 / ↑0.1 / -0 / -0	↑0.5 / ↑0.4 / -0 / -0

For illustrative purposes.

Interconnected, fit-for-purpose data.
For increased confidence.

When you have a unified view of ESG data, functions across your organization can navigate the complex and ever-changing ESG landscape with more clarity and confidence.

Connecting portfolio data to systems, downstream feeds and reporting engines, ESG Data Analytics delivers data that's fit for purpose. Data to help make better decisions and meet reporting obligations with ease. Data to help drive investment alpha and operational efficiency.

STRATEGIC ASSET ALLOCATION & PRODUCT DEVELOPMENT

- Research key metrics to allocate assets and/or create new products
- Customize portfolios using specific combinations of exclusion, inclusion and impact priorities
- Mix and match data sets and taxonomies from different sources to determine the investment parameters that align best with specific goals, risk tolerances and preferences
- View industry feedback and usage of vendor data, factors and impact metrics to inform your investment priorities

PORTFOLIO CONSTRUCTION & MANAGEMENT

- Implement selected data sets to build a customized portfolio to meet a particular purpose
- Utilize what-if analysis to examine how changes to tolerance levels of ESG factors impact a portfolio's sustainability profile, performance and risk
- Compare your portfolio's ESG profile to those of peers or the market
- Identify why portfolio performance differs from those of competitors or benchmarks
- Obtain data to successfully engage with companies to effect change in their ESG practices

REGULATORY, COMPLIANCE & RISK REPORTING

- Generate customizable, consistent reporting to multiple stakeholders, including regulators
- Demonstrate adherence to ESG priorities and preferences to regulators and stakeholders
- Generate post-decision data to examine and improve upon investment process
- Use data to assess your organization's ESG-related activity

MARKETING & COMMUNICATIONS

- Demonstrate ESG integration and adherence to specified ESG priorities for use in corporate communications
- Facilitate client reporting needs to clients and stakeholders (for example, fund fact sheets and annual pension reports)
- Conduct competitive positioning

BNY Mellon ESG Data Analytics. Helping you harness the future of sustainable investing.

Helping you make better decisions, meet reporting obligations with ease, and increase operational efficiency. When you can measure, manage, monitor and report on sustainable investing with consistent data, insight and transparency, you can drive your business forward and meet the future with confidence.

At BNY Mellon, we're committed to putting the Future First^{SM} by using our global reach, influence and resources not just to power success today, but to help safeguard the future. We provide leading products and services that empower our clients to meet their own goals, accelerating the evolution of ESG – on behalf of clients, investors, communities and all stakeholders – to make a positive impact on people and the planet.

For more information about ESG Data Analytics, please contact a client representative at BNY Mellon.

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