



EDM and EDM Warehouse: ESG data

Empowering asset managers to centralize ESG data from multiple providers and incorporate it into portfolio reporting

In response to the changing priorities of their clients and stakeholders, businesses and governments around the world are increasingly putting environmental, social and corporate governance (ESG) considerations at the center of their investment decisions. The resulting increase in ESG metrics and providers has created a new set of data management and reporting challenges, as organizations must incorporate a large universe of data into their processes.

Data management teams must evaluate evolving reporting regimes from multiple ESG providers. They are also increasingly being asked to ensure the consistency and accuracy of this information and to provide access to both current and historical trends.

To address these demands, IHS Markit has expanded its Enterprise Data Management (EDM) platform to provide a central mechanism for the collection of ESG metrics across providers. This allows asset managers to collect data from any provider and quickly link those metrics with related investments and financial entities.

EDM is integrated with EDM Warehouse, the data warehousing solution, allowing users to include ESG factors in a simple reporting model that can then be linked to active and historical portfolio reporting use cases. EDM Warehouse maintains both a historical snapshot of metrics and a reporting model, allowing users to reconstruct or modify reporting schema on a go-forward or historical basis.

Provider-independent

By delivering the integrated EDM/EDM Warehouse solution with a pre-defined data model that has been validated by multiple providers, IHS Markit allows asset managers to model factors from multiple vendors. The flexible structure of the data model allows firms to easily incorporate new factors and metrics as they become available.

Standard templates

EDM Warehouse provides standard reporting templates designed to allow consumers to use ESG factors to compare portfolios to benchmarks and indices, as well as tracking trends in concentration over time.

Centralized data quality

The EDM data management platform gives users the ability to identify outliers and gaps in data, proactively improving the overall quality of the reporting output. The platform can enrich data and cross-reference it with other datasets. This ensures ESG factors can be consistently linked across legal entities and issuers.

Transparent audit and lineage

With EDM, users can manage the distribution of changes to a wide range of consuming systems, including EDM Warehouse. This ensures compliance, risk and portfolio modelling teams are working from the most up-to-date, accurate information and are aware of the impact of data changes.

KEY STATS

200+
EDM clients

40+
managed services clients

CUSTOMERS

Administrators

Asset managers

Banks

Broker dealers

Commodity firms

Energy companies

Hedge funds

**Insurance
companies**

Pension funds

Regulators

Vendors

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