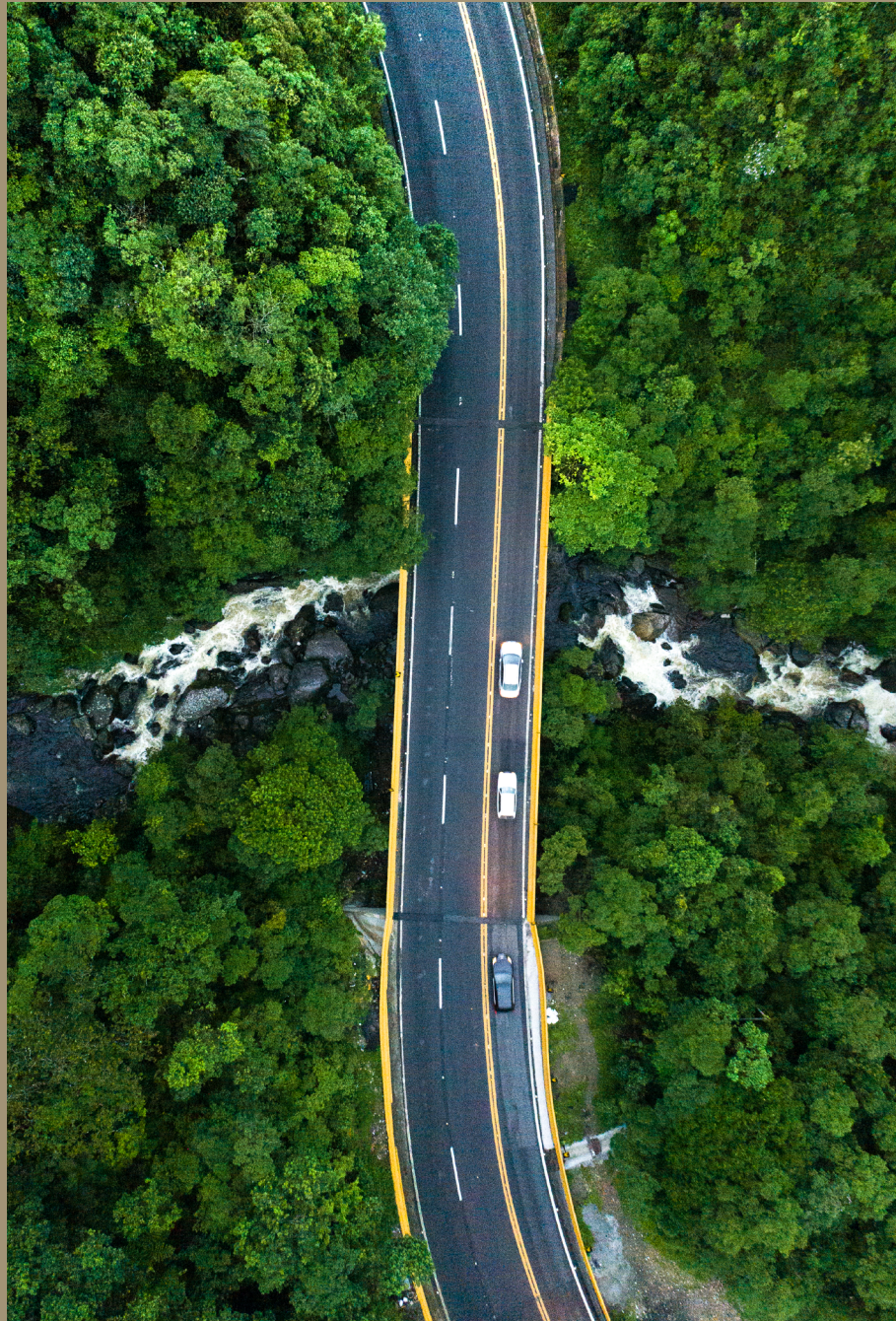# ESG Data Management as a Service

Accelerate your sustainability strategy by outsourcing the ingestion, matching, processing, validation, and management of ESG data, across public and private assets, to our global team of experts.

Market participants are under increasing pressure from regulators and investors to track and deliver transparency into the ESG credentials of their portfolios. However, they face significant challenges due to the high volumes of disparate data that are required from multiple sources, with many firms relying heavily on unscalable manual processes.

Addressing ESG Data Challenges

We empower firms to overcome these challenges with our ESG Data Management as a Service, which brings together the capabilities of our award-winning Enterprise Data Management (EDM) software, our extensive Sustainable1 datasets, our connections to other data vendors, and the expertise of our global team.

Outsource your ESG data workflows to us. We will aggregate and manage data from multiple sources on your behalf and deliver a validated master record in the format and time required for use in your systems.

ESG Data Management as a Service includes:

- **Connectors to data providers:** We have a library of connectors to third-party ESG data providers, as well as our own Sustainable1 datasets. You can choose data fields from the providers with which you have a licence.

- **Aggregation:** Data is aggregated from third-party providers and proprietary sources, across public and private assets, at the company, fund and portfolio levels. You can compare scores and data attributes across sources.

- **Entity hierarchy management:** The service leverages our AI-powered cross-reference service (BECRS) and our classification standard (GICS) to match and master entities across data providers and surface hierarchy relationships.

- **Mapping:** Data is mapped to the fields required for regulatory disclosures (such as SFDR and TCFD) or to a taxonomy that aligns all sources.

- **Universe of interest:** You can opt to receive full datasets or subscribe to a universe-of-interest model.

- **Exception management:** Customizable exception management rules address data quality issues based on your specific workflows.

- **Dashboards:** Reporting dashboards provide visibility into the completeness of the available data for regulatory disclosures and bespoke outputs. You can also see YoY data trends for companies, funds, and portfolios across data providers.

- **Screening:** Apply both positive and negative screens to match ESG values and investment goals while also avoiding conflicting practices.

Key Benefits

Mature Data Management

Take advantage of the mature, award-winning data management capabilities of our EDM software, which has been developed and finetuned based on the requirements of 200+ clients over the past 20 years.

Domain Knowledge

Tap into our deep knowledge of the ESG space and draw on our extensive data assets, including cross-reference and private markets data.

Technology and Data Portfolio

Work with an experienced team of software and data specialists who support the 1,800+ firms that leverage our portfolio of software solutions to streamline a wide range of workflows across their operations.

Operational Freedom

Free up your internal teams to focus on driving the business forward by outsourcing commoditized data operations to our specialist team.
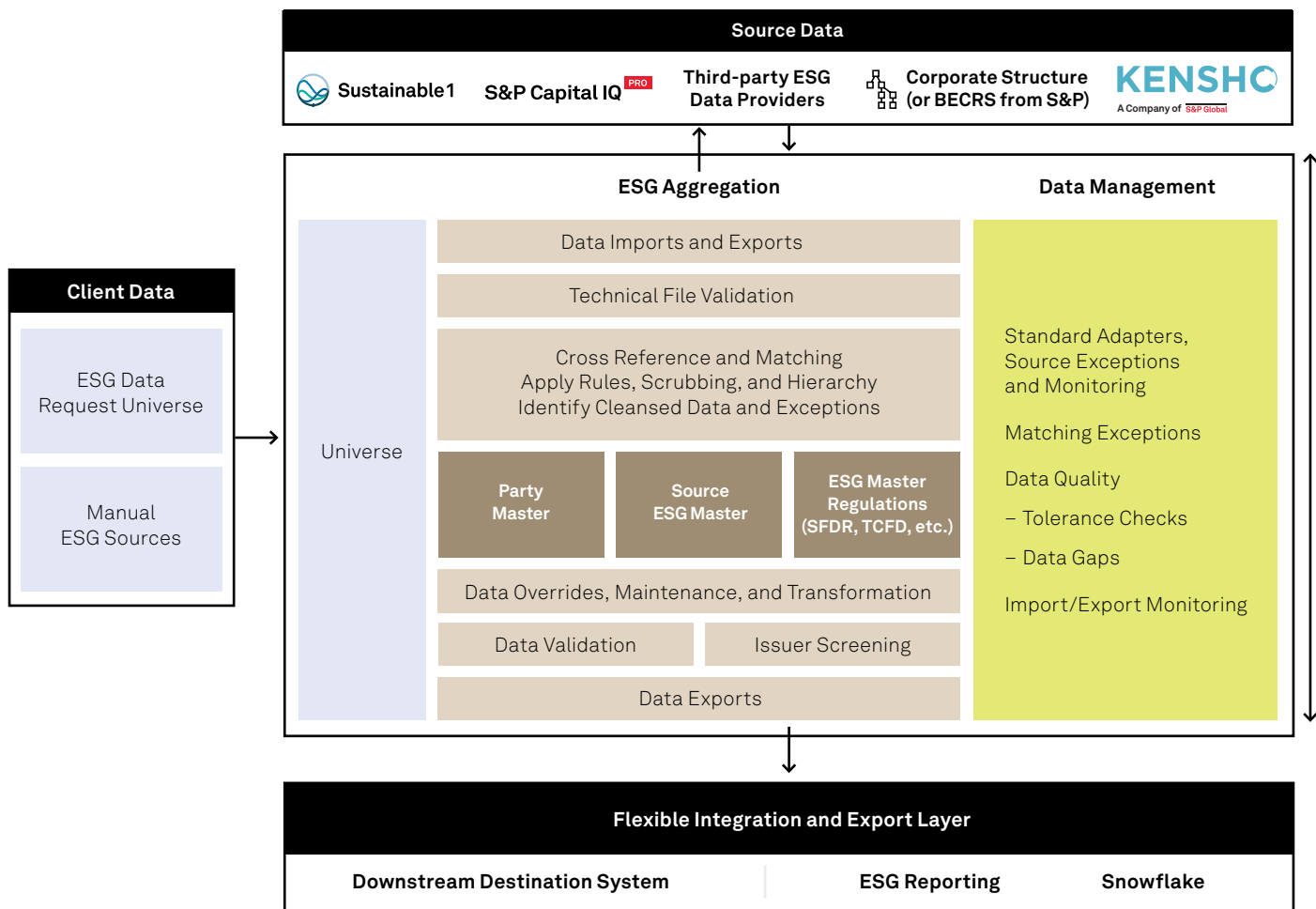
Support for Growth

Expand your use of our service beyond ESG to include other data types required to support your growth plans. Our Data Management as a Service is data-agnostic and we have extensive experience of addressing complex data challenges of all types.

Global Reach

Work with a provider with a global reach that can help you realize your expansion plans and expedite time to market in new regions.

ESG Data Management as a Service Overview

Source Data

Sustainable1   S&P Capital IQ PRO   **Third-party ESG Data Providers**   **Corporate Structure (or BECRS from S&P)**   KENSHO *A Company of S&P Global*

ESG Aggregation

Client Data

- ESG Data Request Universe
- Manual ESG Sources

Universe

ESG Aggregation
Data Imports and Exports
Technical File Validation
Cross Reference and Matching Apply Rules, Scrubbing, and Hierarchy Identify Cleansed Data and Exceptions

Party Master	Source ESG Master	ESG Master Regulations (SFDR, TCFD, etc.)

Data Overrides, Maintenance, and Transformation

Data Validation	Issuer Screening

Data Exports

Data Management

Standard Adapters, Source Exceptions and Monitoring

Matching Exceptions

Data Quality
– Tolerance Checks
– Data Gaps

Import/Export Monitoring

Flexible Integration and Export Layer

Downstream Destination System	ESG Reporting	Snowflake

Key Stats

20 years
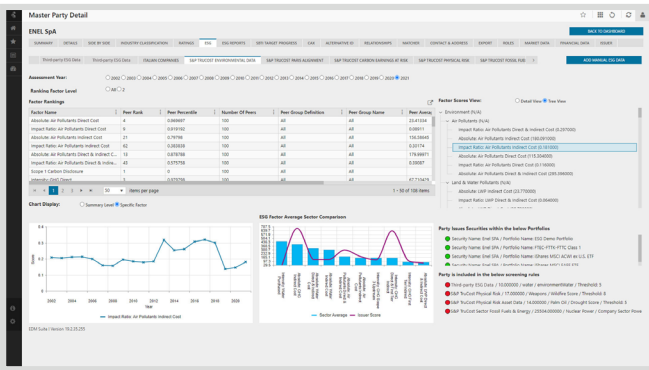of data management experience

200 +
organizations use our EDM platform to manage their data

$27 trillion
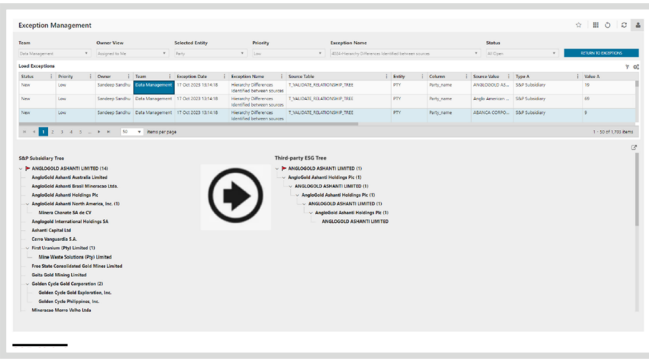combined AUM of firms that use our S&P Global ESG Scores and S&P Global Trucost climate data

Example Dashboards
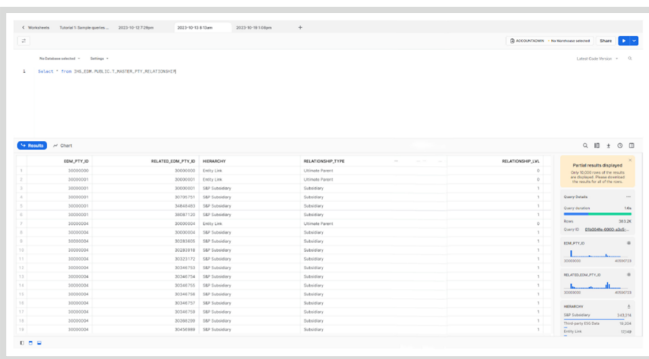
Entity Mastering/Security Alignment

EDM centralizes ESG data at the party/issuer level. The summary screen provides a snapshot of key information about the selected party.

ESG Data Dashboard

The process monitor dashboard shows which processes are currently running, completed or failed.

Comparing Hierarchies Between Third-party ESG Data Providers

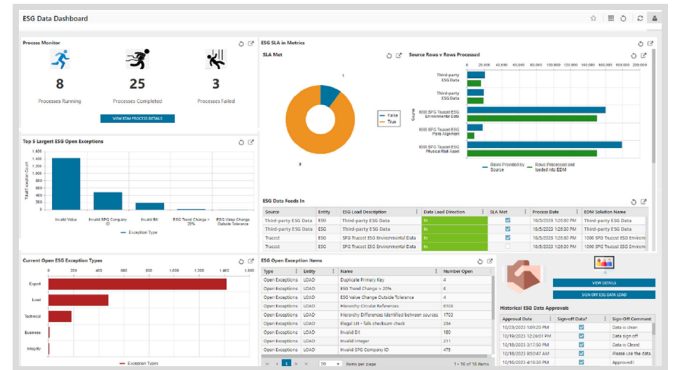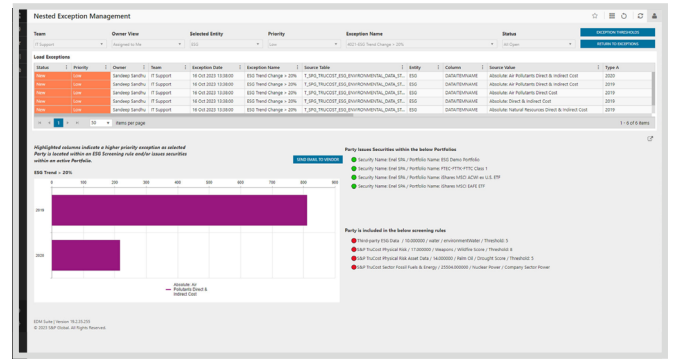Identify and compare differences between hierarchies.

ESG Trend Analysis

Track changes to ESG KPIs and add a monitoring layer.

Data Integration

Integration with widely-used industry platforms, such as Snowflake.

Implementing positive or negative ESG Screens
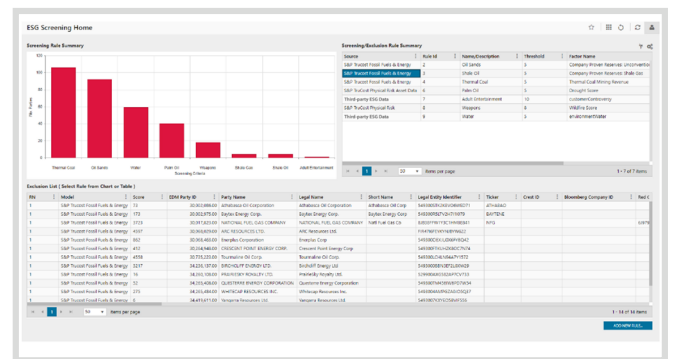
Flexible framework for defining screening rules on an ESG factor basis.

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