

# SOLVING THE ESG DATA CHALLENGE: WHAT ARE THE OPTIONS?



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# THE ESG JOURNEY FOR OUR BUY SIDE CLIENTS

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2021

## Review ESG strategy, ESG risks and regulatory requirements

- Competitive positioning and product differentiation
- ESG risks and impacts
- Regulatory analysis, including EU fund classification
- Minimum ESG data requirements

2022

## Implement new operating model, technologies and data model

- Organisation-wide ESG data strategy
- End-to-end operating model
- New technologies
- Scalable risk and reporting solutions
- Partnership with selected providers
- Intensify engagement with clients and stakeholders

2023

## Live and breathe sustainability

- Embed ESG into company culture, and across all teams
- Employee incentives linked to ESG
- Deliver on the ambitious targets sets
- Increased external reporting and transparency required
- Increasing data complexity

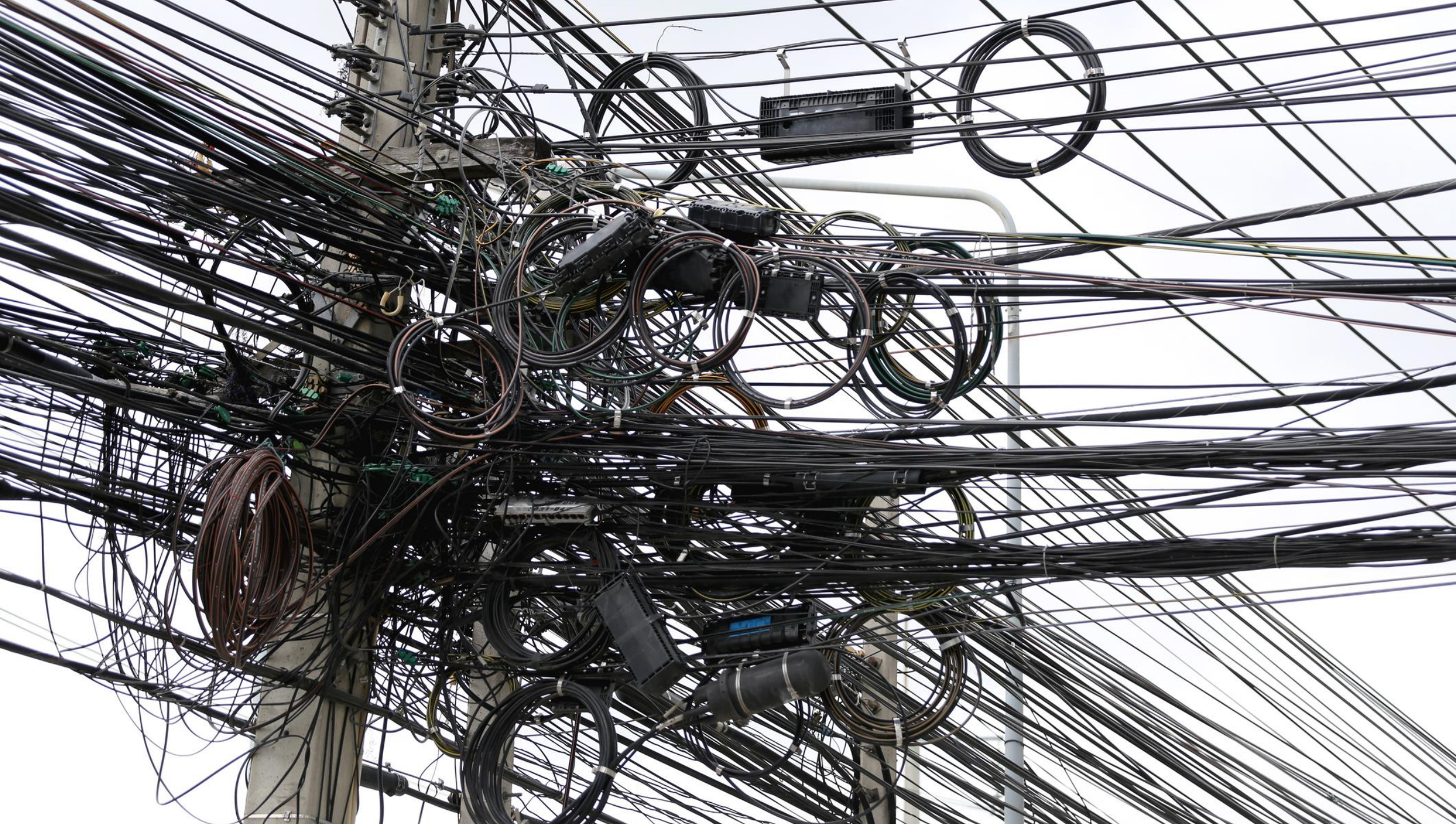


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# OPTIONS: CONNECT, BUY OR DELEGATE?



Product Managers



Chief Investment Officers



Portfolio Managers



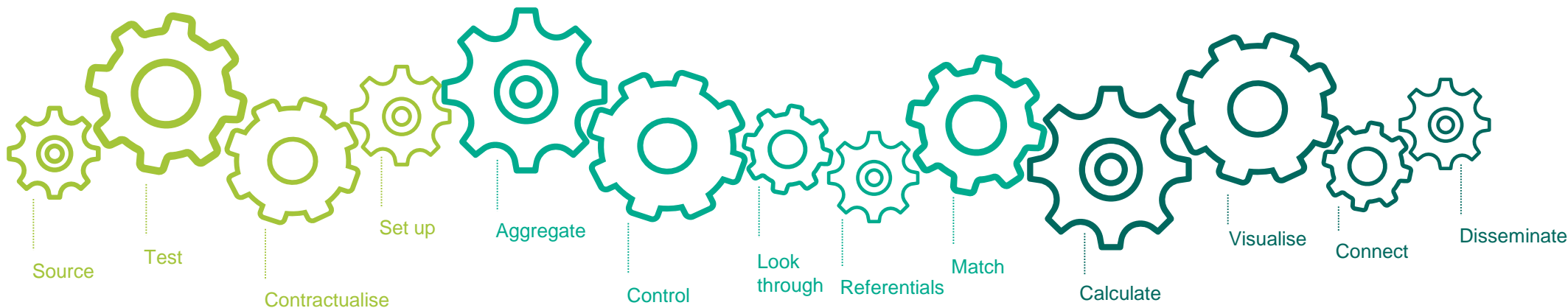
Reporting Officers



Risk Managers



Compliance Managers



DATA SOURCING

DATA MANAGEMENT

ANALYTICS & REPORTING



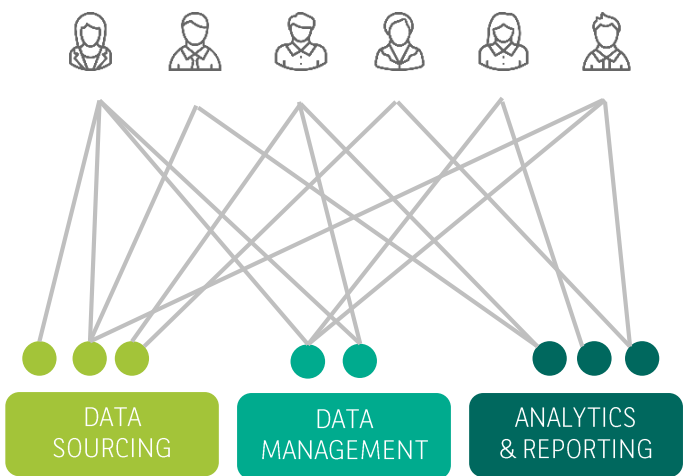
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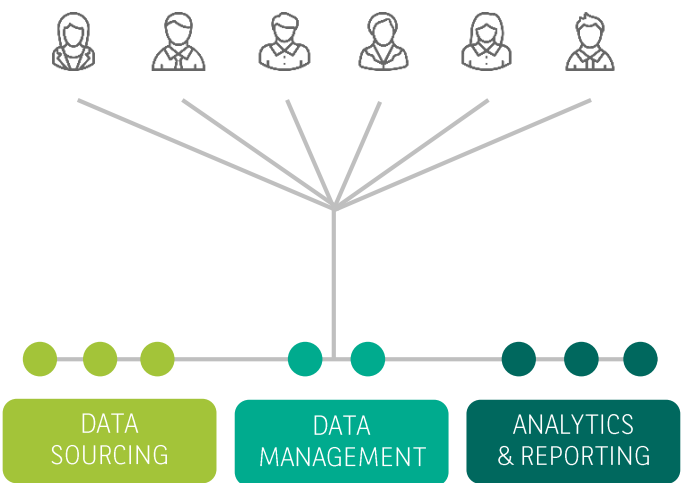
# APPROACHES TO CONNECTING TO THE ESG ECOSYSTEM

## PLUG IT YOURSELF



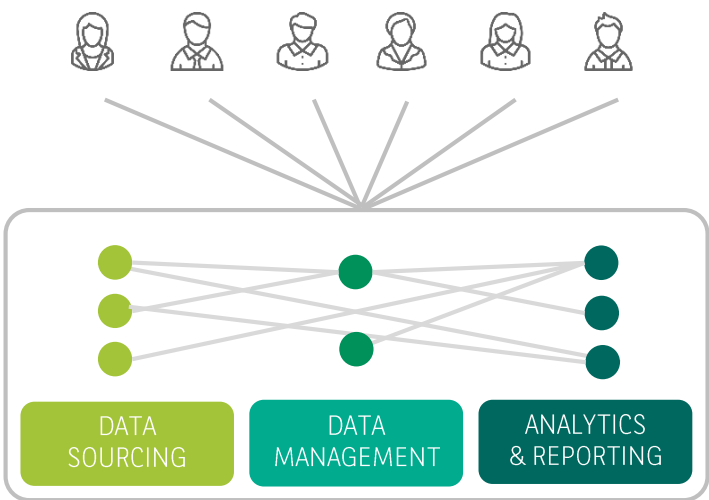
FLEXIBILITY	✓
SCALABILITY	✗
COST EFFICIENCY	✗
BANKING-LEVEL SECURITY	✗

## MARKETPLACE PLATFORMS



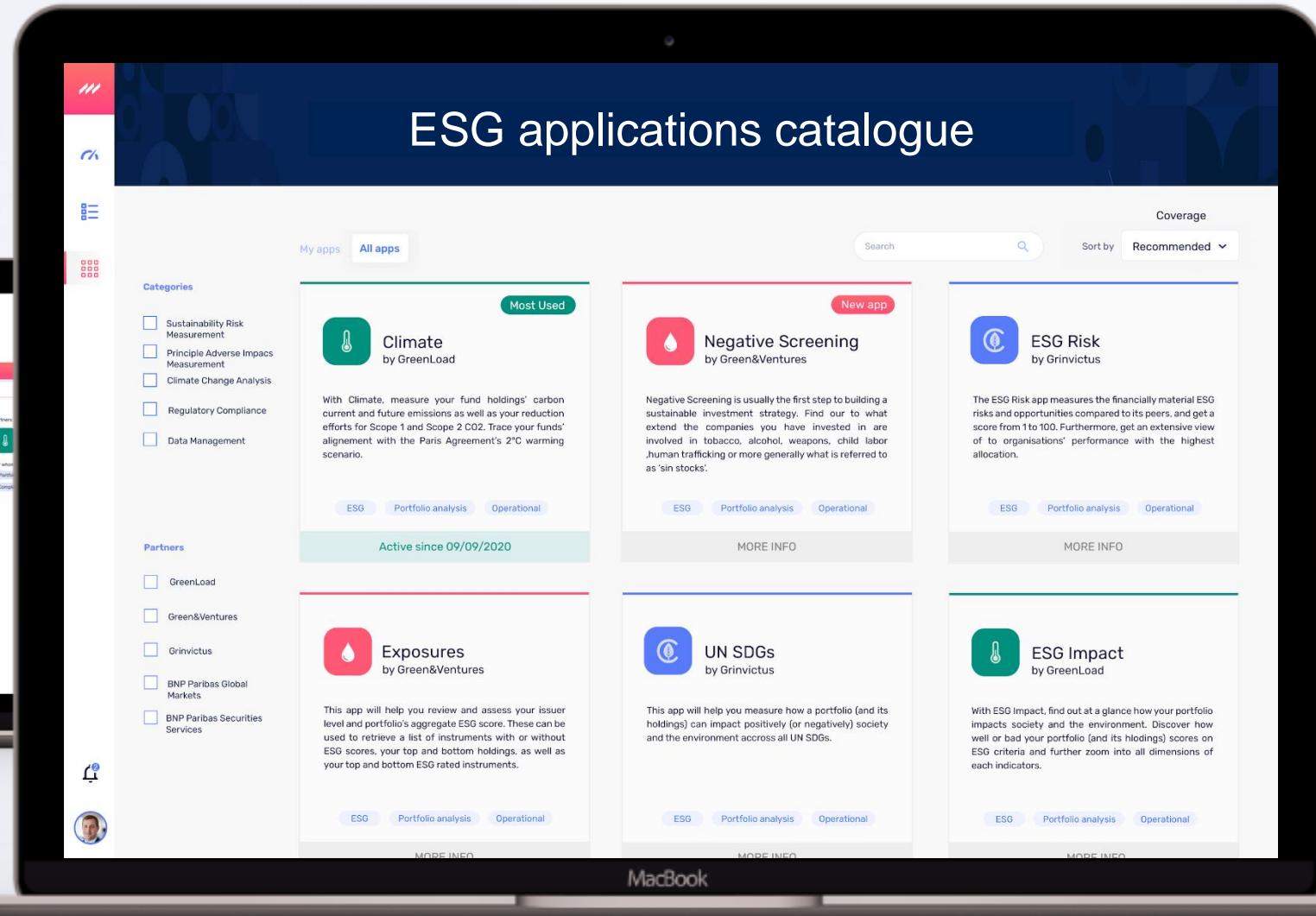
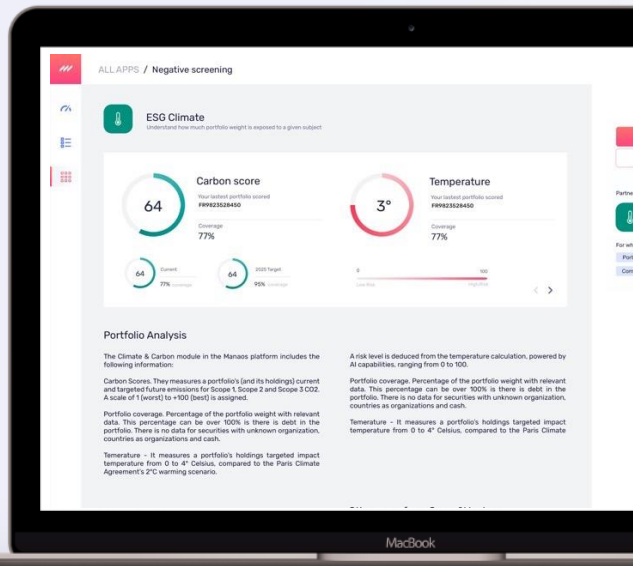
FLEXIBILITY	✓
SCALABILITY	✓
COST EFFICIENCY	✓
BANKING-LEVEL SECURITY	✓

## FULLY OUTSOURCED MODEL



FLEXIBILITY	✗
SCALABILITY	✓
COST EFFICIENCY	?
BANKING-LEVEL SECURITY	✓

# The “app store-like” approach for an ever evolving ESG offer



# BEFORE YOU GO: FOUR KEY TAKEAWAYS

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## DON'T WAIT

The regulations are already applicable and every ESG strategy will be different. The earlier you test, the earlier you know what works for you.



## ADAPT

You don't know where you're going. No one does, because the market is not yet in place. So keep things flexible.



## THINK GLOBAL

Effective ESG strategies irrigate the whole value chain, from pre to post trade. Find robust solutions that can do that.



## BUILD FOR THE FUTURE

Beware of security flaws and cost expenditure as you develop. Ensure your ESG solutions are scalable.



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## FIND OUT MORE AND CONTACT US

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