

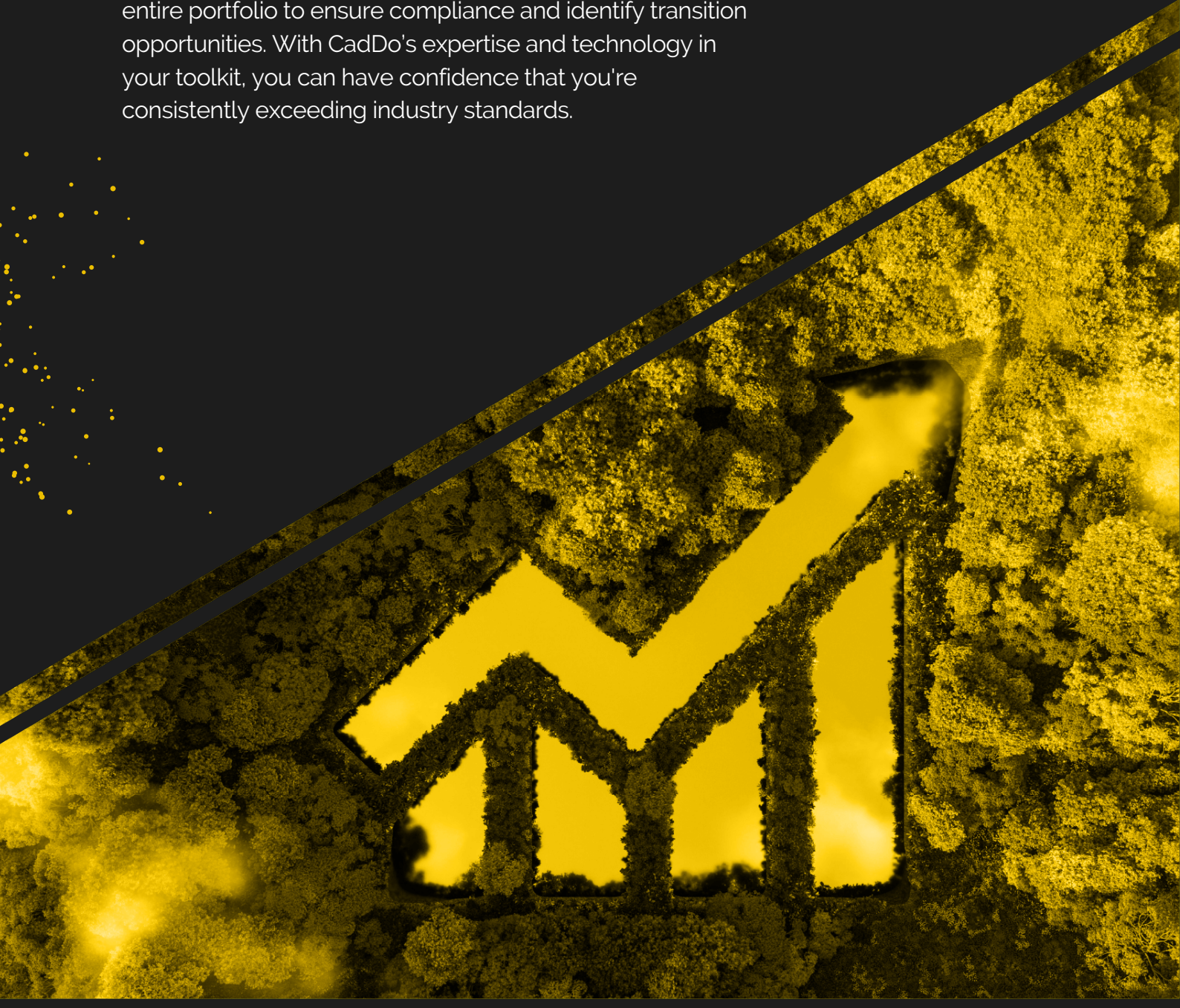


# Pre-configured ESG solution

## Designed for investors and asset managers

Our templated ESG solution is designed to gather, contextualize, and analyze internal and external ESG data. Our approach simplifies the consolidation of investment data, providing clear ESG insights and sustainability reporting through an ongoing managed service.

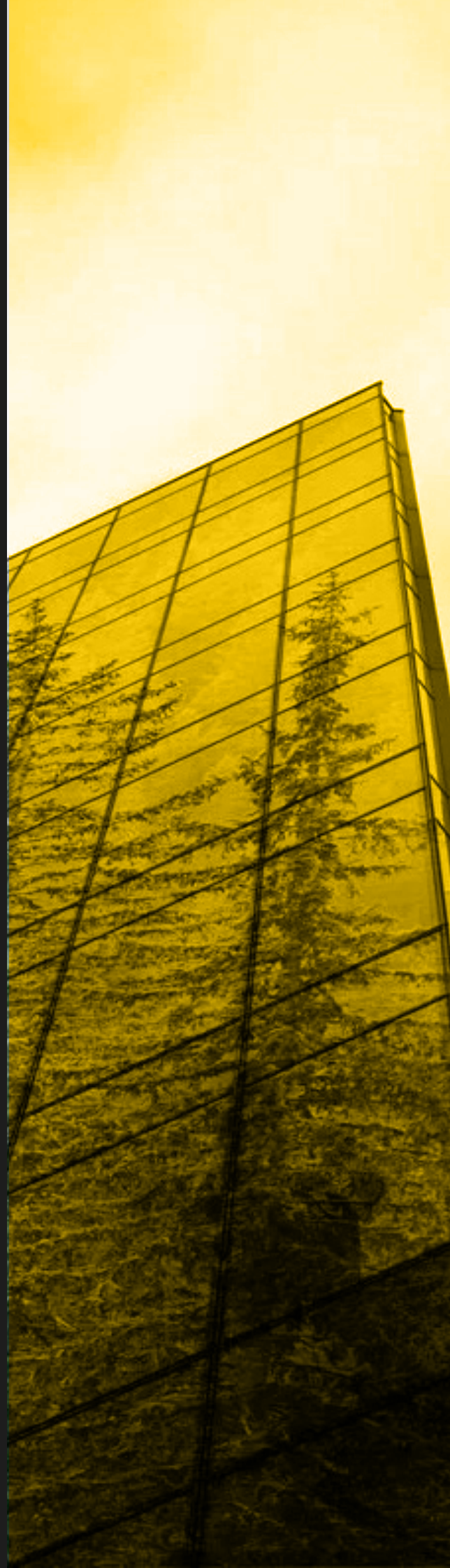
We deliver auditable calculations and simulations for your entire portfolio to ensure compliance and identify transition opportunities. With CadDo's expertise and technology in your toolkit, you can have confidence that you're consistently exceeding industry standards.



# Key features

---

- **Detailed ESG Metrics:** Get a holistic view of investment scores with aggregated ESG metrics customized to your individual priorities.
- **Centralized Data Management:** Eliminate the need for multiple tools by centralizing external and internal ESG data, maintained by CadDo's data strategists, enhancing accessibility and flexibility for your teams.
- **Customizable Logic and Rules Engine:** Define your own rules and logic with expert guidance and a templated process, ensuring transparency and control over calculations with your (or your client) priorities at the forefront.
- **Predictive Scenario Analysis:** ESG-climate predictive scenario analysis allows you to assimilate portfolio impact to understand the impact your decisions could have and build your competitive advantage.
- **Factsheet Reporting:** Present portfolios aligned with client values using flexible, reliable reports incorporating data from a variety of sources, with interpretation and support from CadDo industry experts.
- **Scalable and Evolving Solution:** Quickly absorb new data and measurements with a platform designed to adapt to changing operational and regulatory requirements with ongoing development and maintenance by the CadDo team.
- **Transparent and Auditable:** Ensure complete transparency and auditability of calculations and changes with audit trail and change management capabilities.



# L ]n'9WY: d5

Ej geglkZc b Zi] dYda\ nZchj gzhVXXj g/XnVcY V \^†n:

## 1 CadDo Transformation

- You provide raw ESG data from your selected provider, customer holdings and benchmark data from your records.
- Our friendly team with technical expertise in data integration and business modelling extract, transform and load clean data into our templated solution.

## 2 CadDo Calculate

- Our platform enables screening to identify outliers and mitigate risk based on ESG priorities, while allocating metrics to Holdings, Issuers, Securities, and Portfolios for multi-dimensional analysis.
- It provides a single ESG score for publicly listed companies, derived from over 250 underlying ESG metrics, with the ability to perform unlimited logical calculations and maintain transparent and auditable calculation logic independently of source data.

## 3 CadDo Analytics

- Co-development sessions with our sector experts facilitate seamless creation of calculations and simulations, complemented by ongoing support for maximizing your solution benefits.
- Leveraging our expertise in data and ESG, we conduct collaborative root-cause analyses to pinpoint issue origins, enhancing your understanding and problem-solving efficiency.

**Ready to get started?**

Contact us today

**Tel: 0203 143 3352 | [contact@CadDo.com](mailto:contact@CadDo.com) | [caddo.com](http://caddo.com)**