



Technology | Advisory | Automation



# SFDR Automation for Financial Institutions

The Only European Sustainable Finance Disclosure  
Regulation (SFDR) Solution You Need

# What Is SFDR?

The Sustainable Finance Disclosure Regulation (SFDR) mandates asset managers & other financial market participants to evaluate & disclose their sustainability-related data & policies at the entity & product levels.



## SFDR Reporting Challenges



Large data spread at  
firm & portfolio levels



Complex calculations  
& multiple data points



Continuous need for  
specialist advice

# ESGTree - A Fully Integrated SFDR & EU Taxonomy Reporting Solution

- Translate legislation & technical indicators into an intuitive interface that enables portfolio companies to track & improve their performance.
- Automate Principal Adverse Impact Indicators (PAI) reporting & track alignment with the SFDR & EU Taxonomy on both product & entity levels.
- Prepare for all current & future global ESG regulations through ESGTree's holistic frameworks automation.



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✓	✓	
	✓	✓
✓		

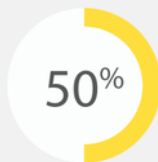
Portco Scorecard

## Portfolio Companies

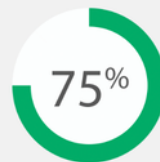
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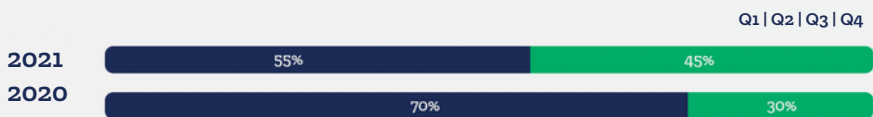
Portfolio Data submitted



EU Taxonomy Alignment



Data Completeness



# Collect, Analyze & Report ESG Data From Your Portfolio

ESGTree is a holistic ESG reporting solution that is purpose built for Private Equity and Financial Institutions. Our Platform enables you to manage data & reporting at the Limited Partner (LP), General Partner (GP) & Portfolio Company (PortCo) level.

1

Easily add your portfolio companies to the ESGTree platform & automate data collection, aggregation, calculation & communication.

2

Explore multi-level reporting dashboards that ensure 360-degree visibility & accountability at the entity & product levels.

3

Gain a thorough understanding of SFDR reporting metrics & calculations.

4

Generate your Principal Adverse Impact (PAI) Report & track your EU Taxonomy Alignment.

# Support At Every Step Of Your ESG Reporting Journey

ESGTree's founding team comprises of sustainability & impact investment professionals that have decades of global ESG experience. Our qualified team is well-equipped to provide advisory services to customers interested in fulfilling their SFDR & EU Taxonomy compliance obligations. Our advisory services include creating sustainability risk reports, remuneration policies, and all other documentation that firms must have for Article 6, 8, and 9 compliance.



ESGTree streamlines our ESG reporting to our investors. Most notably, the Carbon Calculator feature, which reduces the time taken to calculate carbon emissions by 70%. Kudos to the ESGTree team for providing such a seamless user experience.

Jessie Chen | Senior Market Analyst | Emburse



## Our Clients

We work with a range of financial institutions such as Impact Investors, Private Equity (PE) and Venture Capital (VC), Pension Funds, Development Finance Institutions (DFIs), Banks, Companies & more.



# About us



ESGTree is a purpose-built, one-stop-shop solution for ESG and Impact Data Reporting and Disclosure for corporations and investors. We help your firm report ESG back more effectively to institutional investors and financial institutions.

## Contact Us

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