



ENVIRONMENT, SOCIAL & GOVERNANCE

MAKE ESG WORK FOR YOU



WHAT IS ESGTREE

ESGTree is a purpose-built, one-stop-shop solution for ESG and Impact data reporting and disclosure for private capital investors. We help your firm report ESG back more effectively to Limited Partners (LPs) and institutional investors.



Technical



WHAT ESGTREE OFFERS

ESGTree is the world's only platform which allows for data management at the Limited Partner (LP) or General Partner (GP) or Portfolio Company (PortCo) level.



Data Collection & Analytics

Portfolio-level data collection and aggregation of analytics, purpose built to serve the needs of seasoned and new ESG managers.



Industry Benchmarking

Advanced benchmarking, trend analysis and scoring tools to improve and optimize decision-making for clients.

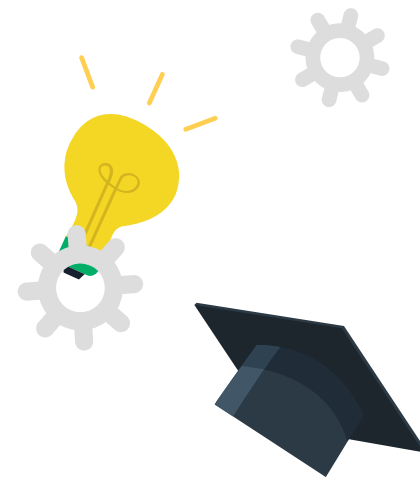


Alignment with Standards

Alignment with the most updated ESG and sustainability standards & frameworks.



PRIVATE EQUITY INVESTORS' ESG NEEDS



High-quality ILPA compliant reporting & ESG data-based solutions for investors.



Automated data collection requests, analysis and reporting.

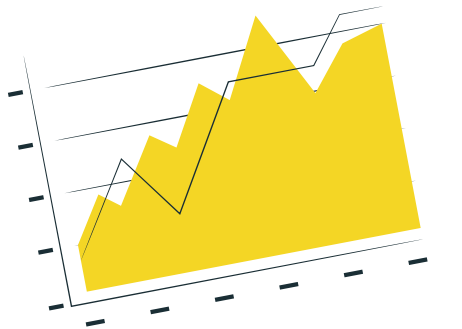


Identification of portfolio-level ESG risks and opportunities included in quarterly and annual reporting.



PE-firm (corporate) level reporting for creation of sustainability reports.

ESGTREE RESULTS & IMPACT



Better quality ESG and impact data through ESG Tree's multi-level data collection system.



Increased and more systematic reporting to investors.



ESG training and culture development for portfolio companies and management teams.



Improved ESG reporting to contribute to and facilitate fundraising with responsible investors.



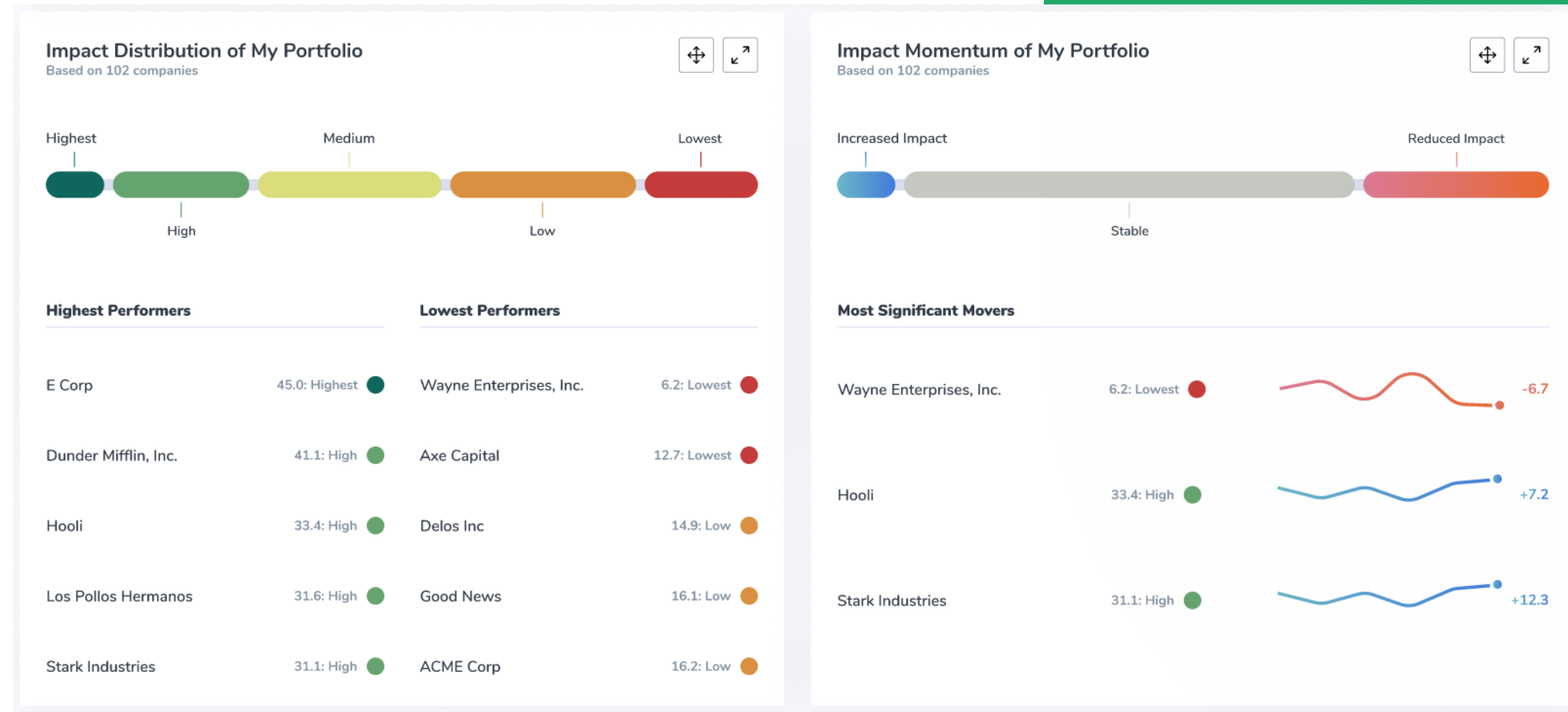
ESGTREE STEP-BY-STEP WALKTHROUGH



SYSTEM SCREENSHOTS



SYSTEM SCREENSHOTS



SYSTEM SCREENSHOTS

Environmental, Social and Governance Evaluation

Dunder Mifflin, Inc.

ESG Score
76 /100

Environment



Social

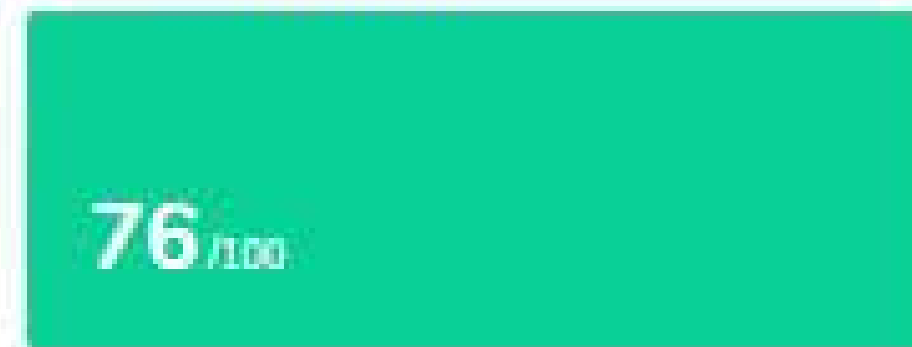


Governance



Entity Specific: attainable and actual scores

ESG Evaluation



4 Higher scores indicate better sustainability

Entity

Dunder Mifflin, Inc.

Headquarters

Damrak, 1012 LL Amsterdam, Netherlands

Primary operation location(s)

Boston Rd, The Bronx, NY, USA

Publication Dates

December 9, 2020 9:39 AM

Primary Contact

Dwight Schrute

dwight.schrute@esgtree.com

SYSTEM SCREENSHOTS

Dimension Scores

Environmental Performance		Social Performance		Governance Performance	
Environmental Score	Good	Social Score	Excellent	Governance Score	Good
GHG Emissions	0 / 2	Human Rights & Community Relations	1 / 1	Product Design & Lifecycle Management	2 / 4
Energy Management	3 / 4	Customer Privacy	1 / 1	Supply Chain Management	0 / 1
Water & Wastewater Management	2 / 2	Access & Affordability	0 / 1	Business Ethics	1 / 1
Waste & Hazardous Materials Management	2 / 3	Labor Practices	1 / 1	Competitive Behavior	1 / 1
Ecological Impacts	1 / 1	Employee Health & Safety	1 / 1	Management of the Legal & Regulatory	1 / 1
Environmental Score	8 / 12	Social Score	14 / 16	Governance Score	6 / 9
E-Profile	67 / 100	S-Profile	88 / 100	G-Profile	67 / 100

PDF Report

ESG Profile (including any adjustments) **76 / 100**



Client Success



SOME OF OUR VALUED CLIENTS



LEADING US-BASED SOFTWARE INVESTOR - PRIVATE EQUITY CLIENT:



Problem

To implement ESG data management solutions for collection, reporting and performance management.



Solution

Using ESGTree, our client trained and aligned their entire senior leadership team on ESG best practices, issued quarterly ESG reports to LPs and launched their inaugural sustainability report.



Impact

Our client efficiently completed ESG requirements during the raising of a new fund, integrated ESG reporting into quarterly and annual reports and created a formal ESG committee with specific improvement plans for the portfolio.



Client Testimonial We collect a lot of data on our companies, but this is data we do not have anywhere else. We benchmark everything, so I'm not sure why we didn't think of benchmarking ESG data before ESG Tree."

~ Managing Partner, US-based Private Equity Firm.



IMPACT INVESTMENT CLIENT:



Problem

To determine 'true' impact performance of portfolio companies and be able to query historical data for insights and analysis.



Solution

An in-depth impact measurement tool was created to measure the performance of Impact indicators against global regional and national benchmarks as well as an interactive dashboard for queries, visualizations and insights of historical data.



Impact

The client was able to assess which indicators were performing strongly (and which poorly) based on country-level and global benchmarks and query the data in different ways for insights.



Client Testimonial: We have worked with many Impact Measurement providers, but ESGTree has the best understanding of market needs.



CREDIT UNION CLIENT:



Problem

ESGTree's client in the credit union space wanted to establish their authentic relationship with ESG and impact and finalize a set of impact metrics which would address material issues.



Solution

ESGTree was able to guide the senior leadership team to identify their material factors and help the client develop a set of custom indicators to be piloted through the ESGTree system.



Impact

Increased awareness of senior executive management on ESG and Impact related issues and finalizing a set of pilot indicators for data gathering.



Client Testimonial: ESGTree allowed us to go from 'folklore' to tangible systems and processes around ESG and Impact Reporting.



NON-PROFIT IMPACT INVESTMENT ASSOCIATION CLIENT:



Problem

To develop a survey to study the influence of current members, including impact investors and impact service providers, and understand national level impact investment activities compared with historical data.



Solution

ESGTree designed, collected and analyzed a survey to understand the current impact investment-related activities of significant Canadian impact investment industry players.



Impact

ESGTree developed a survey with impactful insights and data analysis that identified the impact investing sector's status in Canada and the impact of its members' assets under management in emerging and frontier markets.



Client Testimonial: ESGTree was able to design a data approach for us to collect a large amount of data from our members and convert it into meaningful analysis and reporting.



The ESG LandScape



WHAT IS ESG AND WHY DOES IT MATTER?

What is ESG?

ESGTree allows sustainability reporting and disclosure at the ESG (risk management) as well as Impact (SDG-related management) through globally recognized standards.

ESG' stands for 'Environment, Social and Governance', which are the three main pillars that help determine the sustainability of an investment decision.

SOME ESG STANDARDS



WHY DOES ESG MATTER?



Global trends show a clear shift towards ESG focus for the financial sector in a move from shareholder-driven to stakeholder-driven capitalism.



Ernst & Young reports that 98% of institutional investors now consider non-financial performance in their decision-making process.



KPMG reports that over 50% of private equity firms use ESG in due diligence for price negotiations.



ESG DATA MANAGEMENT AND REPORTING: WHAT'S MISSING?

01

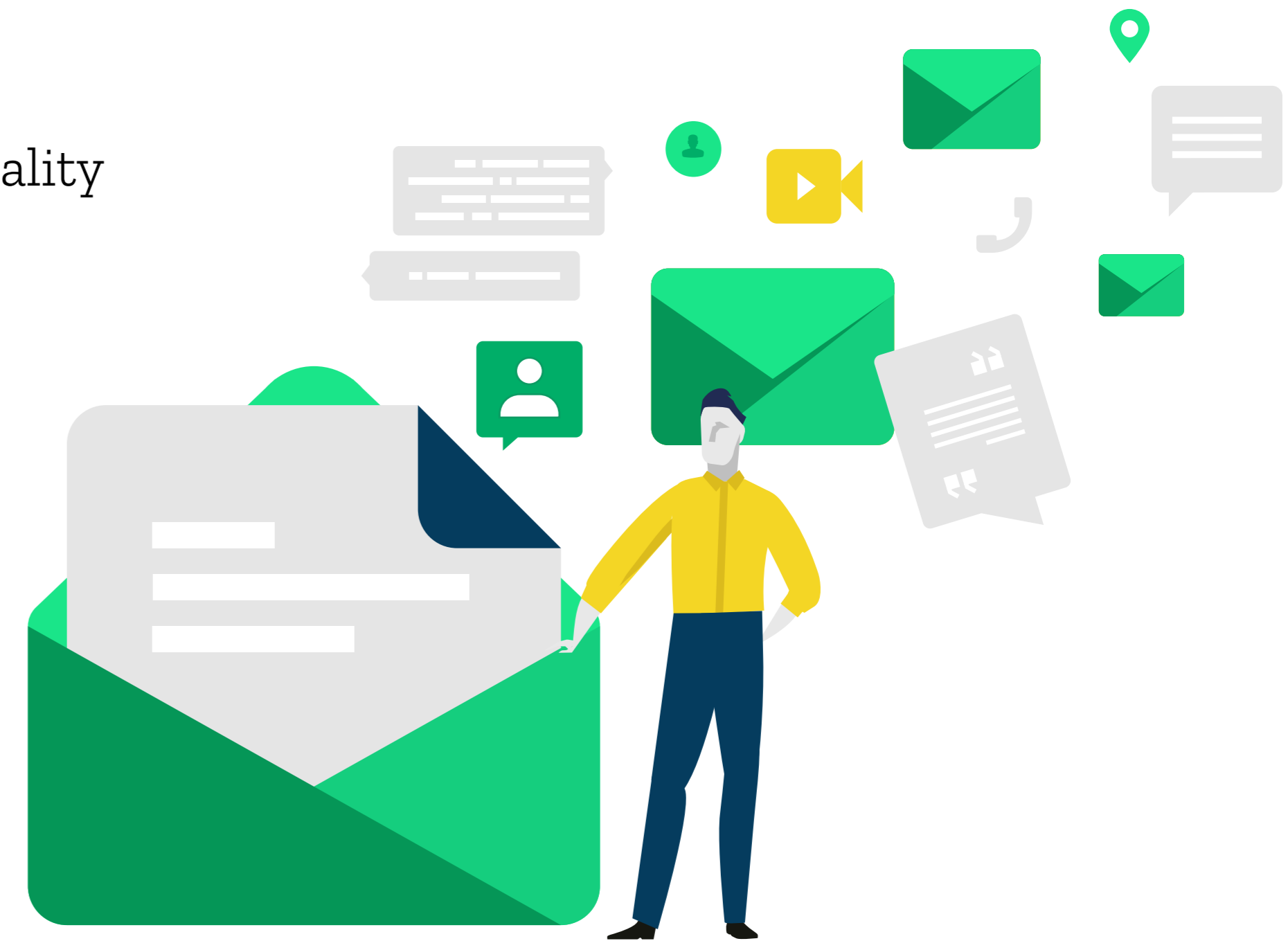
ESG data solutions are not designed for private capital investors and a portfolio-based approach. Private equity and venture capital firms need an end-to-end solution to solve all their ESG needs and enhance their ESG reporting and performance.

02

While organizations may be collecting ESG data, high quality analysis and benchmarking using large datasets are not being applied to improve decision-making.

03

Reporting through Excel and other data analysis tools is inefficient and cannot keep pace with changes in ESG frameworks and standards.



CLIENT ENGAGEMENT LEVELS/OPTIONS

How to engage with ESGTree:



Consultation

Fill out a consultation form to assess your needs and determine the best fit for your firm.



Pilot

Engage in a phase-by-phase pilot using existing datasets to determine the best fit for your firm.



Subscription

Annual subscription to the platform, which includes access to client success services.

CONTACT US

Address:

Canada:

ESGTree, Centre for Peace Advancement, 140
Westmount Rd. North Waterloo ON N2L 3G1 Canada

United Kingdom:

ESGTree, 33 Queen Street, London EC4R 1AP, United
Kingdom

Phone:

1-647-955-3656 ext. 500

Email:

info@esgtree.com

Linkedin:

<https://www.linkedin.com/company/esgtree>

