



Investor Relations Sustainability Insights Report

**Attract More Capital | Build Your Company Reputation |
Allocate Capital for Sustainability**

In today's evolving sustainability landscape, S&P Global Market Intelligence presents the **IR Sustainability Insights Report**. This report empowers Investor Relations and Sustainability departments and management teams to seize opportunities and mitigate risks in the capital markets related to sustainability.

Our dynamic report integrates market-leading data, innovative technology, and analyst insights, providing a tailored sustainability perspective for your company. It helps you to:

- **Target ESG-Focused Investors:** Utilize comprehensive peer analysis to attract capital that aligns with your equity story.
- **Enhance Sustainability Communications:** Gain insights into investor ESG interests and priorities to strengthen your company's reputation.
- **Improve Capital Allocation Decisions:** Assess your company's existing ESG gaps based on CSA practices to inform better investment strategies.

Why S&P Global Market Intelligence

Utilizing proprietary data from S&P Global, we provide intelligence based on a substantial sample size. Our product delivers objective, data-driven insights, ensuring clear and actionable findings.

Market Coverage

55,000 +
Global Institutions
and Funds

155,000 +
Buy-side and
Sell-side Contacts

2,500 +
Corporate Issuers
93% of the Dow 30
67% of the S&P 500
44% of the
Nasdaq 100

3,500+
Corporate
Sustainability
Assessment (CSA)
Survey Respondents

13,000 +
Companies
assessed through
the CSA

Investor Relations Sustainability Insights Report

In the current investment landscape, aligning with Environmental, Social, and Governance (ESG) priorities is key to attracting new investors. This report highlights how enhancing your sustainability performance can significantly increase your appeal.

By identifying areas for improvement through ESG assessments and gap analysis, your company can strengthen its sustainability practices, making it a more attractive investment opportunity. Mapping investor ESG priorities to Corporate Sustainability Assessment (CSA) topics allows you to tailor your strategies to meet investor expectations effectively.

Additionally, our peer analysis uncovers ESG-focused investors actively seeking partnerships with sustainability-driven companies. Targeting these investors expands your reach and opens new avenues for investment.

Leveraging these insights empowers your company to enhance its ESG strategies, positioning you to attract sustainability-focused investors and drive growth.

Investor Opportunities

Are you nurturing your current ESG investors?

Understanding your current investors' ESG interests allows you to better tailor your business practices to meet their needs and align with their interests.

Top 5 ESG funds invested in Company XYZ and Peers

**Overall, invests in high-growth companies with higher-than-market multiples, innovative to yield.*
**Alternative: Includes hedge funds using non-traditional investment strategies.*
**Fund: Promotes companies with high dividend yields and a history of dividend growth.*
**GARP: Targets discounted companies expected to grow faster than the market, with longer holding periods.*
**Free Float for Company XYZ is of 5,764,064,200 shares (Source: S&P Capital IQ).*

Fund Name	Institution Name	Company XYZ: USD mm	Company XYZ: Shares mm	Free Float %*	Fund Investment Style	Turnover	Market Cap	Suitability	Normal PP	Stretch PP
Banana Growth Fund	Banana Growth Fund	155	13	0.23%	Growth*	50%	68%	35	-2,977,000	-2,977,000
Apple Sustainable Fund	Apple Sustainable Fund	127	11	0.20%	Alternative*	140%	55%	95	-5,788,000	-4,963,000
Grapes Action Fund	Grapes Action Fund	54	4	0.87%	Value*	20%	62%	99	-458,000	795,000
FigFund	FigFund	48	3	0.65%	GARP*	20%	55%	94	-405,000	991,000
Pineapple Responsible Investment	Pineapple Responsible Investment	25	2	0.54%	Value	25%	37%	83	1,284,000	2,142,000

Top 5 ESG funds invested in Company XYZ and Peers by funding amount

◀ Total % of Investment in Company XYZ

Investment in peer greater than Company XYZ

Fund Name	Institution Name	Company XYZ: USD mm	Company 1: USD mm	Company 2: USD mm	Company 3: USD mm	Company 4: USD mm	Company 5: USD mm	Total Equity Assets Under Management (USD mm)	
Banana Growth Fund	Banana Growth Fund	155	Not Invested	Not Invested	Not Invested	Not Invested	Not Invested	5,927	◀3%
Apple Sustainable Fund	Apple Sustainable Fund	128	Not Invested	Not Invested	126	Not Invested	159	4,747	◀3%
Grapes Action Fund	Grapes Action Fund	55	16	Not Invested	43	36	52	2,548	◀2%
FigFund	FigFund	48	Not Invested	34	Not Invested	38	Not Invested	2,818	◀2%
Pineapple Responsible Investment	Pineapple Responsible Investment	25	14	11	24	18	37	4,263	◀1%

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Identify new ESG-focused investors through comprehensive peer analysis.

Top 5 ESG funds invested in your company

- Total % of Investment: Percentage of total investments made by these funds in your company.
- Total % of AUM: Proportion of all Assets Under Management (AUM) allocated to your company.
- Regional Investment: Amount invested in your specific region by these funds.
- Peer Investments: Number of peers these funds invest in, along with the corresponding percentage of investment.

Top 5 Funds to Target

- Suitability Assessment: Evaluation of how well these funds align with your company's profile for potential investment.
- Peer Investment Overview: Total percentage of investment these funds have in your peers.

Investor ESG Priorities

Mapping investor ESG Priorities to S&P Global Corporate Sustainability Assessment (CSA)

Highlighting the Environmental, Social, and Governance (ESG) factors that play a critical role in the decision-making processes of your investors

Investor priorities	Topics related to the priority	CSA 2025 Focus
Environmental	Climate Actions Physical & transition risk	Climate Strategy <ul style="list-style-type: none">Climate GovernanceClimate-Related Management IncentivesPhysical Climate Risk AdaptationClimate-Related Scenario Analysis
	Net-zero/Decarbonization Low carbon economy	Decarbonization Strategy <ul style="list-style-type: none">Net-Zero Targets for Financial EmissionsScope 1 Financial Assets EmissionsScope 3 Financial Emissions Intensity
Social	Human rights	Human Rights <ul style="list-style-type: none">CommitmentOversight Processes
	Social Inclusion	Financial Inclusion <ul style="list-style-type: none">Products & ServicesNon-Financial Support
Governance	Health and Wellbeing	Occupational Health & Safety <ul style="list-style-type: none">OHS PolicyAbolition RateEmployee Support ProgramsTrend of Employee Wellbeing
	Good Governance	Corporate Governance <ul style="list-style-type: none">Board TypeNon-Executive Chairperson/ Lead DirectorBoard Diversity PolicyBoard Gender Diversity
	Cyber security	Information Security <ul style="list-style-type: none">GovernanceManagement Programs

Your company's investors' top priorities across Environmental, Social and Governance categories have been mapped against the S&P Global CSA methodology topics, to enable a performance benchmarking against the CSA practice and peers. In this report you'll find your company's performance analysis on the selected ESG topics, showcasing strengths and areas where there is a potential for improvement compared to the CSA expectations. The ESG topics included in the CSA are relevant to the growing number of sustainability-focused investors.

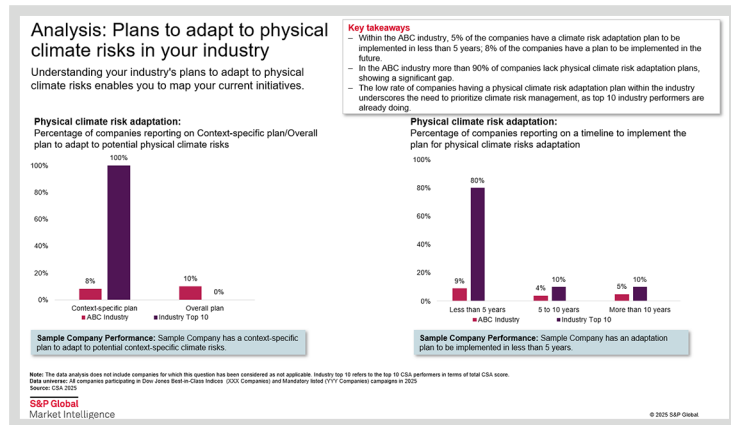
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Mapping Investor ESG Priorities to Corporate Sustainability Assessment (CSA) Topics

- In-Depth ESG Analysis: A comprehensive evaluation of the specific ESG priorities for each fund discussed.
- Integration with CSA Metrics: Map fund ESG priorities to CSA aspects to assess alignment with expected practices
- Industry Leader Benchmarking: Compare performance against CSA industry leaders to identify strengths and areas for improvement.
- Selected Peer Benchmarking: Benchmark against a defined group of peers to understand relative performance and positioning.
- Comprehensive ESG Trends: Analyze performance across all three ESG dimensions, offering insights into progress and emerging trends.

Your Company Sustainability Performance



ESG Priorities and Gap Analysis

- Peer Comparison: Evaluate how your company's score compares to peers, the Dow Jones Best-In-Class Indices (DJSI) world average, and top industry scores.
- Underperformance Gap Analysis: Identify specific areas where your company is underperforming relative to benchmarks and peers.
- Best Practices Utilization: Utilize the CSA peer practices database to identify successful examples to learn from.
- Data-Driven Insights: Gain insights into your performance compared to peers through a detailed analysis of metrics relevant to investors.

To request for a demo request, [click here](#)

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