

# 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.

**Key takeaways**

- The top 5 ESG funds invested in Company XYZ own up to 409 USD mm, or 32M shares, investing an average of 2% of their total equity into Company XYZ. Currently, four of them are also invested in Company's peers. Bananas fund invests more in peer Company 1 than in company XYZ. The Grapes Action fund is currently invested more in peers company 2 and company 3 than company XYZ.

Fund Name	Institution Name	Company XYZ USD mm	Company XYZ Assets mm	Free Float %*	Fund Investment Style	Turnover	Market Cap	Suitability	Normal PP	Switch PP
Bananas Growth Fund	Bananas Growth Fund	155	13	0.23%	Growth*	50%	65%	35	-2,977,000	-2,977,000
Apple Sustainable Fund	Apple Sustainable Fund	127	11	0.20%	Alternative*	140%	55%	90	-5,748,000	-4,560,000
Grapes Action Fund	Grapes Action Fund	54	4	0.67%	Value*	27%	62%	99	-458,000	765,000
Fig Fund	Fig Fund	48	3	0.65%	DAQ00*	29%	56%	94	-605,000	991,000
Pineapple Responsible Investment	Pineapple Responsible Investment	20	2	0.64%	Value	24%	37%	83	1,264,000	2,142,000

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

Total % of Investment in Company XYZ

Fund Name	Institution Name	Company XYZ < 500 mm	Company 1 > 500 mm	Company 2 > 500 mm	Company 3 > 500 mm	Company 4 > 500 mm	Company 5 > 500 mm	Total Equity Assets Under Management (USD mm)
Bananas Growth Fund	Bananas Growth Fund	155	Not Invested	Not Invested	Not Invested	Not Invested	Not Invested	5,927
Apple Sustainable Fund	Apple Sustainable Fund	128	Not Invested	Not Invested	126	Not Invested	159	4,747
Grapes Action Fund	Grapes Action Fund	55	56	Not Invested	43	36	52	2,548
Fig Fund	Fig Fund	48	Not Invested	34	Not Invested	38	Not Invested	2,816
Pineapple Responsible Investment	Pineapple Responsible Investment	20	14	11	24	18	37	4,263

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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
	Net-zero/Decarbonization Low carbon economy	Decarbonization Strategy
	Human rights	Human Rights
Social	Social Inclusion	Financial Inclusion
	Health and Wellbeing	Occupational Health & Safety Human Capital Management
Governance	Good Governance	Corporate Governance
	Cyber security	Information Security

**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.**

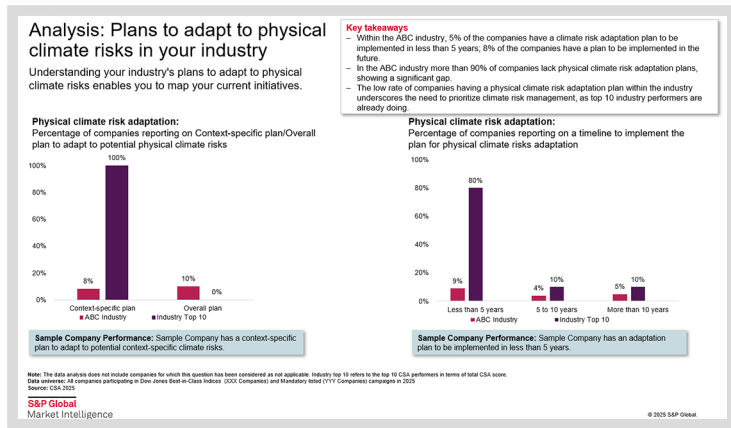
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## Mapping Investor ESG Priorities to Corporate Sustainability Assessment (CSA) Topics

- 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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