An Introduction to CadDo ESG

October 2019

The light on ESG is shining brighter than ever before

Millennials are investing between $15-20t in US-based ESG investments MSCI	In 2018, €44.6b net new investment in Europe was in funds with ESG criteria Broadridge	89% of investment consultants anticipate an increase of client interest in ESG Eurosif

But there is still a gap between expectation and reality

40% of advisors say that lack of understanding of ESG holds back investment Cerulli	Data challenges make ESG investment more complex and expensive BNP Paribas	Lack of comparable data is a major hindrance for 43% of investors CFA

There is a need to start viewing companies not just by their financial metrics…but by their ESG Score

Environmental	Social	Governance

CadDo has created its SaaS platform to provide concentrated intelligence in sustainability & ESG information to Financial Services

It's presented through a simple-to-deploy solution meaning no work for clients' in-house IT teams

It delivers clear, aggregated ESG metrics and analysis across all potential investments

Data is weighted to clients' specific assets giving them a tailored, holistic view of their holdings and portfolios

The platform quickly gives asset managers the ability to view their holding with up-to-date, accurate ESG metrics, underlying data and trend information

...alongside their existing financial performance analysis

Open Data Integration

CadDo ESG is designed to work with **your data providers**

Open Data Sourcing

CadDo ESG is designed to take feeds from the host of data maintained by **your analysts**

Underpinned by our proven abilities to collate disparate data sources, and identify & manage inconsistencies and/or discrepancies

All Asset Classes

Equities

Funds

Bonds

Commodities

Illiquid Assets

Non-Financial / ESG Metrics

Voting History

Engagements

Relationship Management

Screening Results

Outlier Identification

Additional Information

Climate-related CapEx

ESG-related Initiatives

Related Subsidiaries

Geographical Spread

Climate-related Disclosures

See the whole universe of Issuers

...Or see a summary by Portfolio

See the ESG Score...or a score by E vs. S vs. G

Then drill into Portfolios
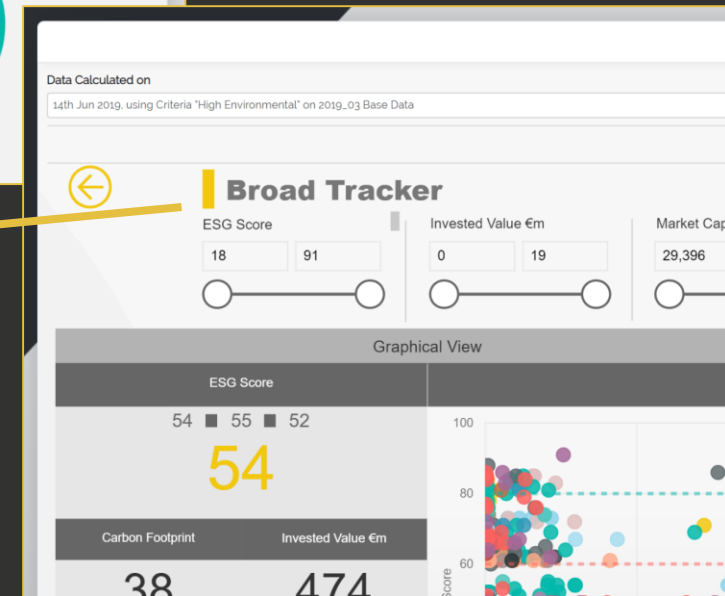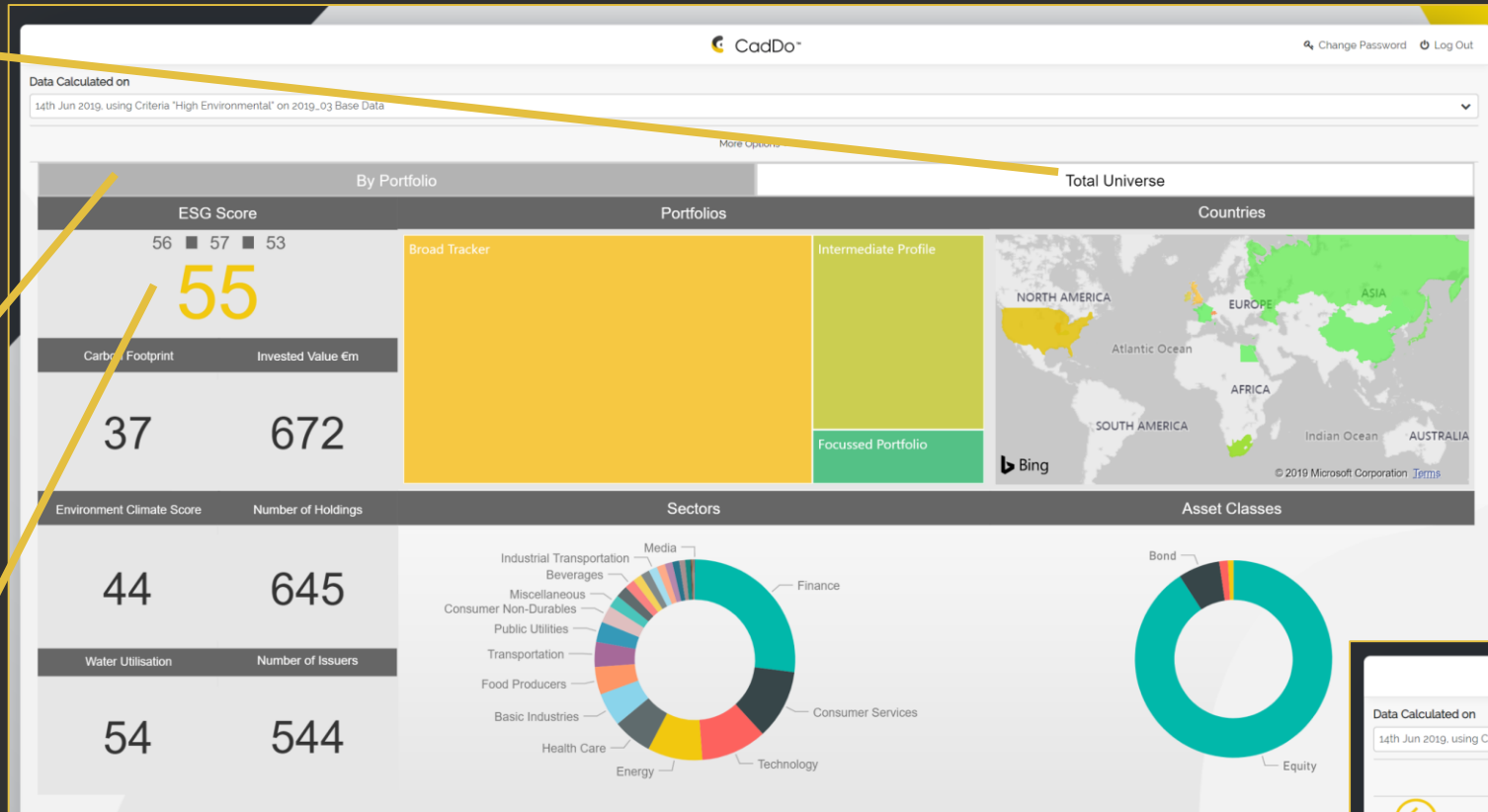
Add extra 'leading' indicators

See trend analysis

Highlight key SDG metrics

Drill through to see further details
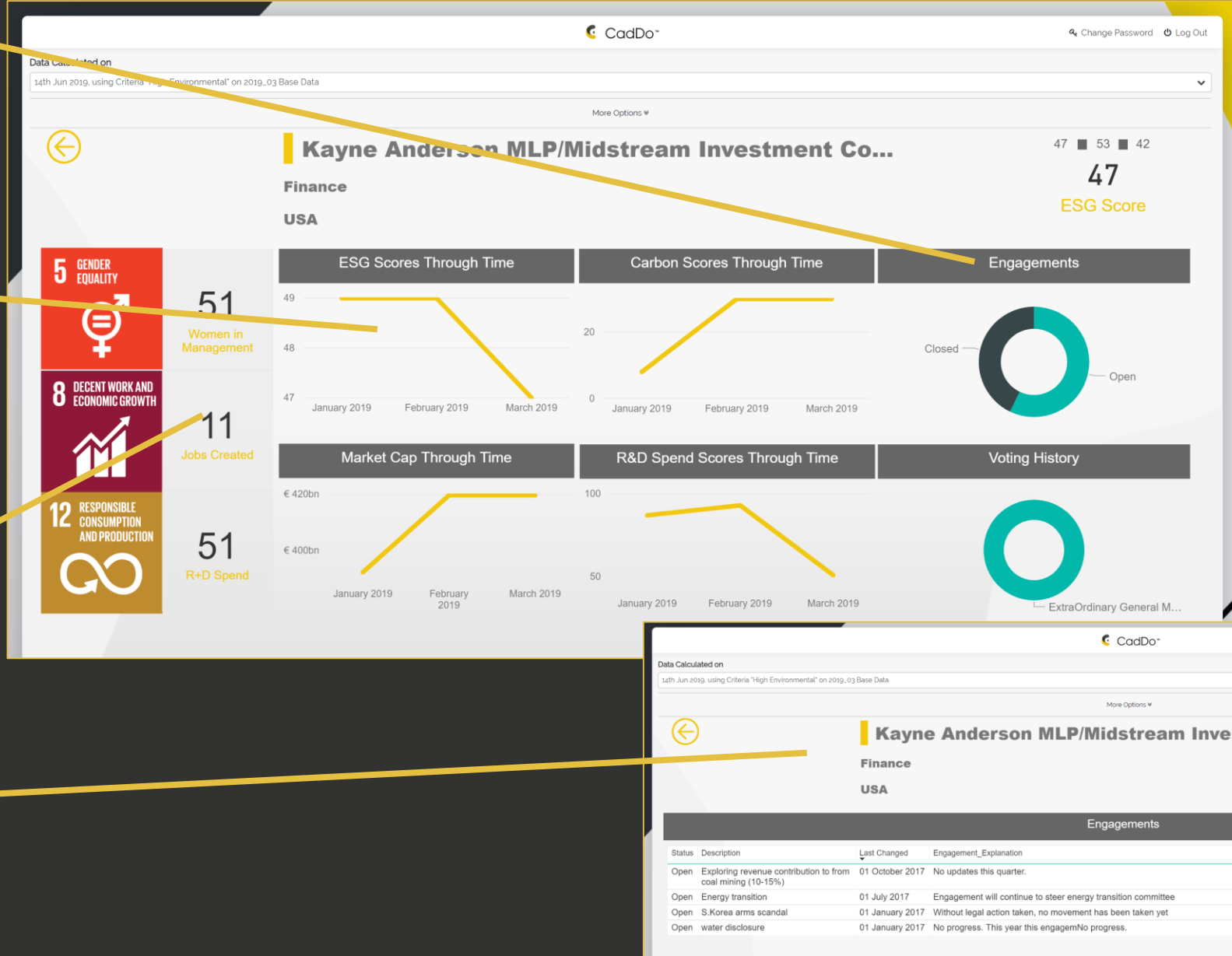
Define multiple sets of criteria

Define your key metrics

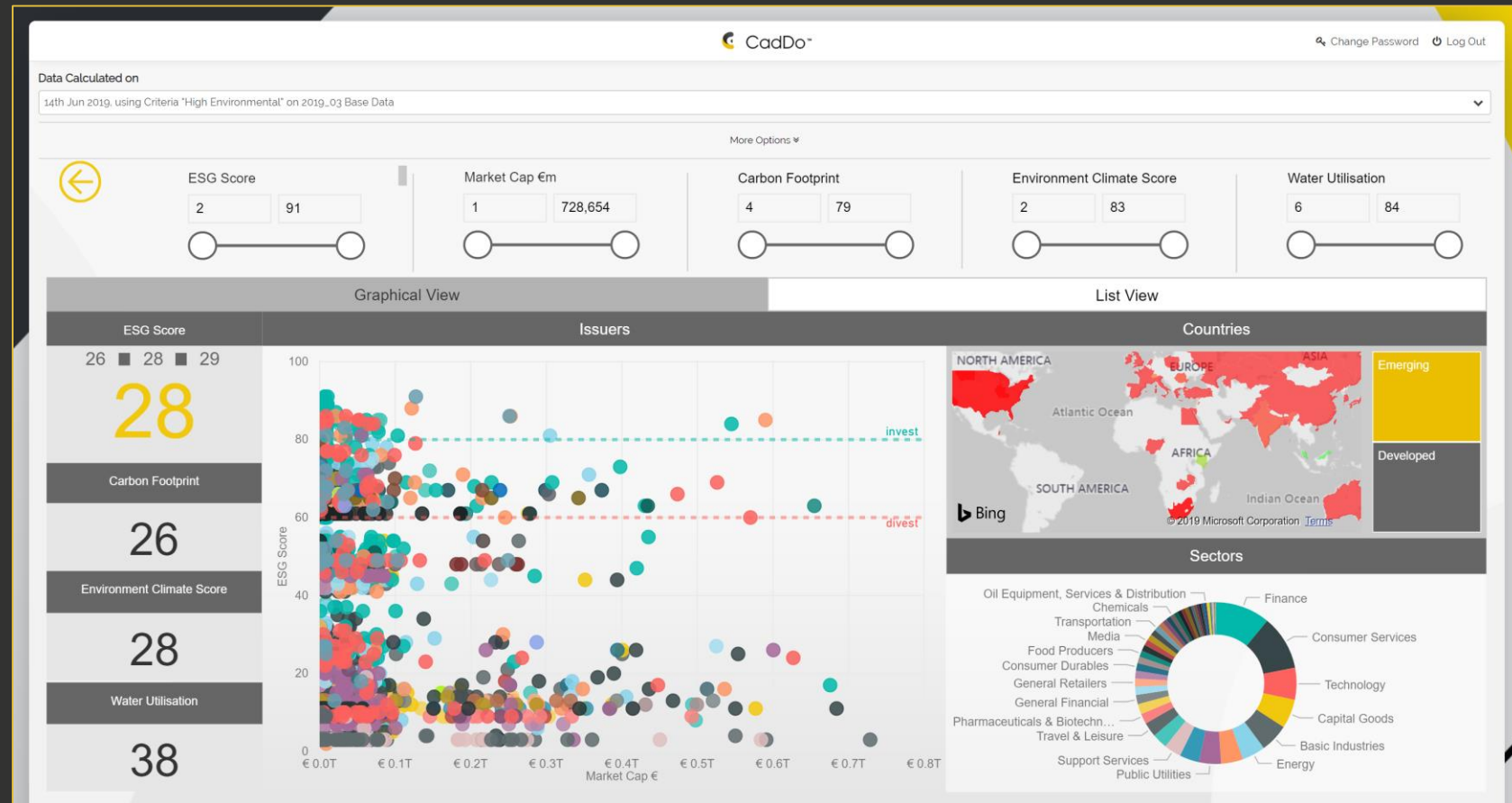**Define your priorities by weighting each metric**

CadDo ESG

The starting point for any solution, is the ability to produce meaningful and usable ESG Scores
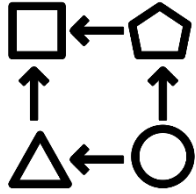
That being a **single indicator** of the overall ESG performance, in accordance with the priorities and preferences of you and your investors

CadDo ESG delivers that out-of-the-box

Live demo…

Portfolio Management is complex

'Direct' ESG Scores can only be calculated for base securities (equities, bonds etc)

But investors buy funds, not just base securities, to build their portfolios

Funds consist of mixtures of base securities & other funds…which in turn may own other funds…eventually getting down to base securities

How do you get from the client's portfolio, down through the layers of funds, to the base securities and their ESG Scores?

And then how do you roll that back up to a portfolio-level ESG score?
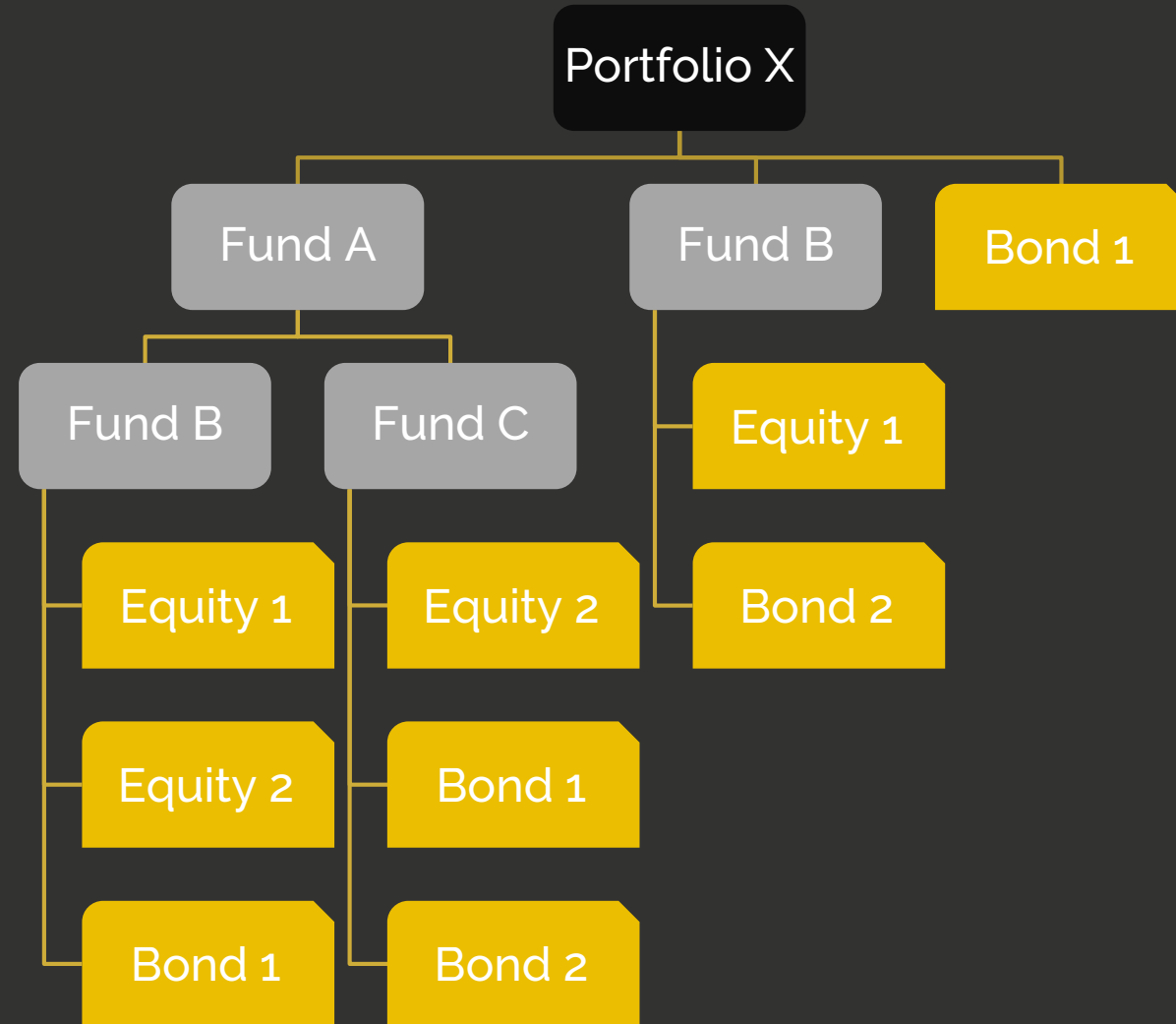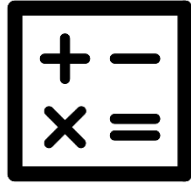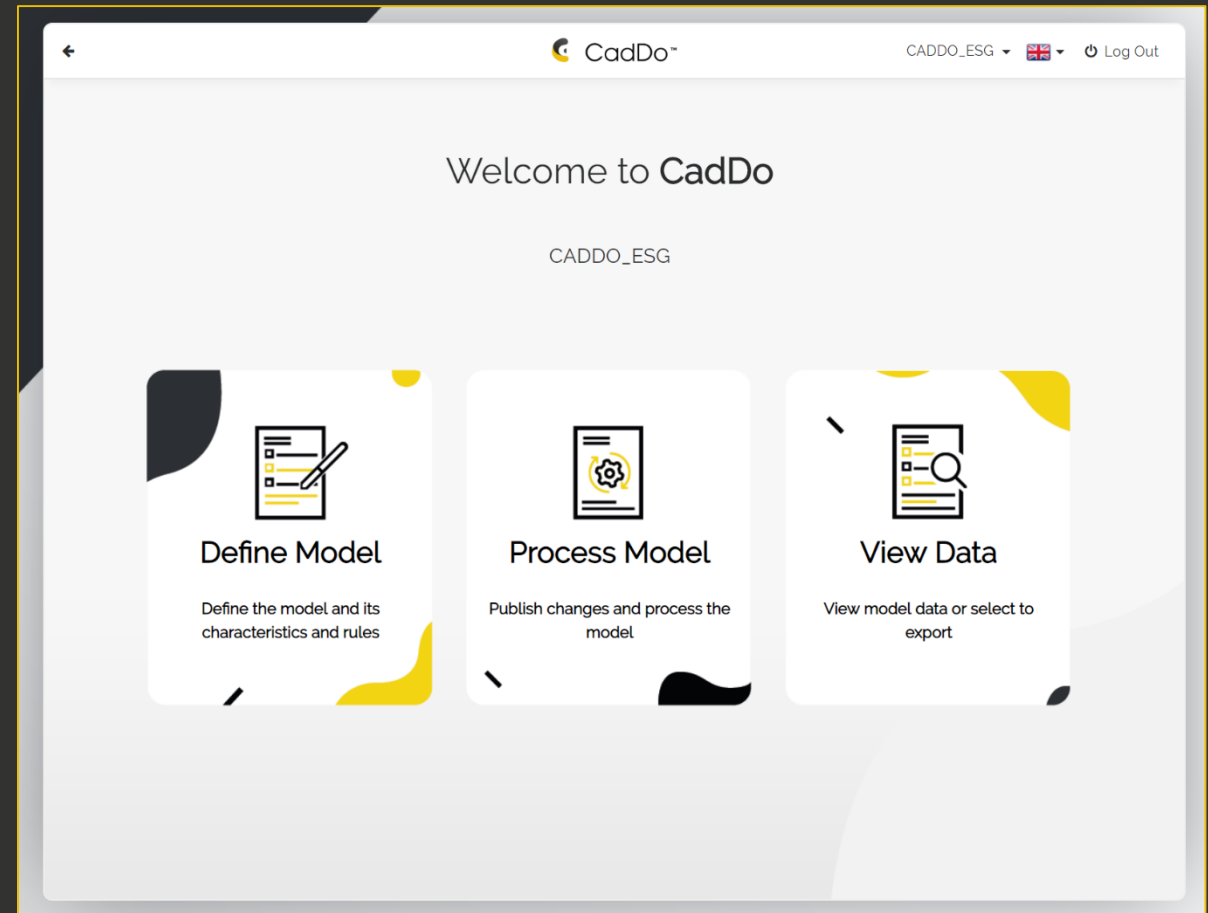
CadDo Calculate Solves The Problem

Our CadDo Calculate engine is designed, from the ground-up, to solve problems like this

From parent-child relationships, to recursive allocations, CadDo Calculate delivers what's needed

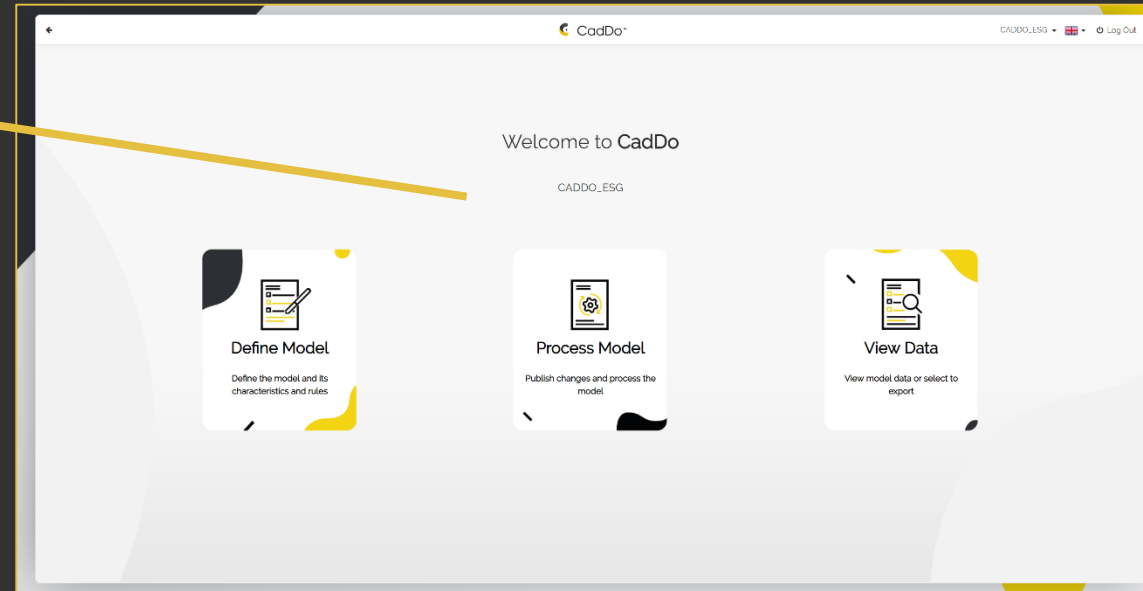We build bespoke models inline with your requirements, but based on our extensive experience

All models run within our CadDo Calculate toolset meaning logic is auditable, controlled and visible

Welcome to CadDo

CADDO_ESG

Define Model
Define the model and its characteristics and rules

Process Model
Publish changes and process the model

View Data
View model data or select to export

Live demo...

Define, Process and View data in one place

Define your drivers and logic

Build Scenarios & Hierarchies
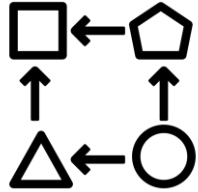
CadDo Transformation

Technical expertise in data integration and business modelling with unique cross-functional skills

CadDo Calculate

Class-leading calculation Software as a Service (SaaS) running on Microsoft's global Azure platform

CadDo Analytics

Track record of helping clients improve business performance using Data Science methodologies

Underpinned by expertise in profitability & sustainability data, and analytics we help our clients in abroad range of areas, such as:

Customer & Product Profitability

Connecting Disparate Data Sources into a Single Version of the Truth

Holistic Customer Investment

Thank You