



CadDo

An Introduction to CadDo ESG

October 2019

Where We're at in Sustainability

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

Aon

ABInBev

Unilever

aciham

TÜRK
TUBORG

Asahi

GRANDE.

BT

Pension
Protection
Fund

mitie

★ Heineken®

MillerCoors®

GROUPE RENAULT

TESCO

DIAGEO

TechData®

Open Data Integration

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



FTSE
Russell



Bloomberg



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

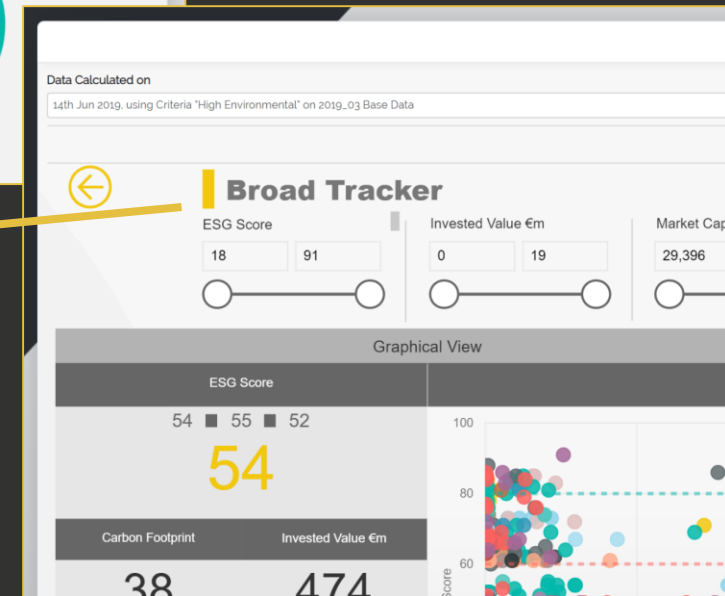
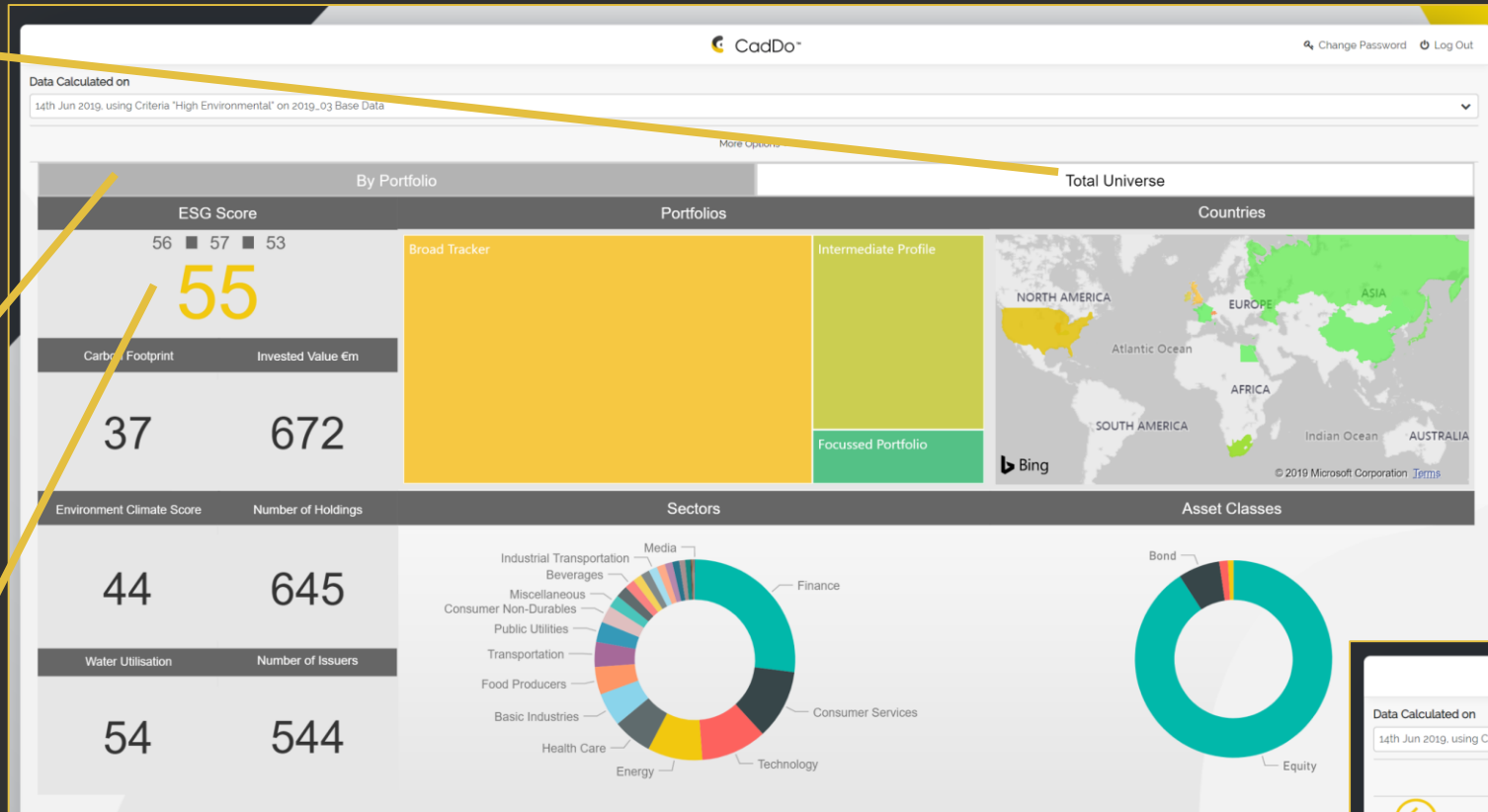
Climate-related Disclosures

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



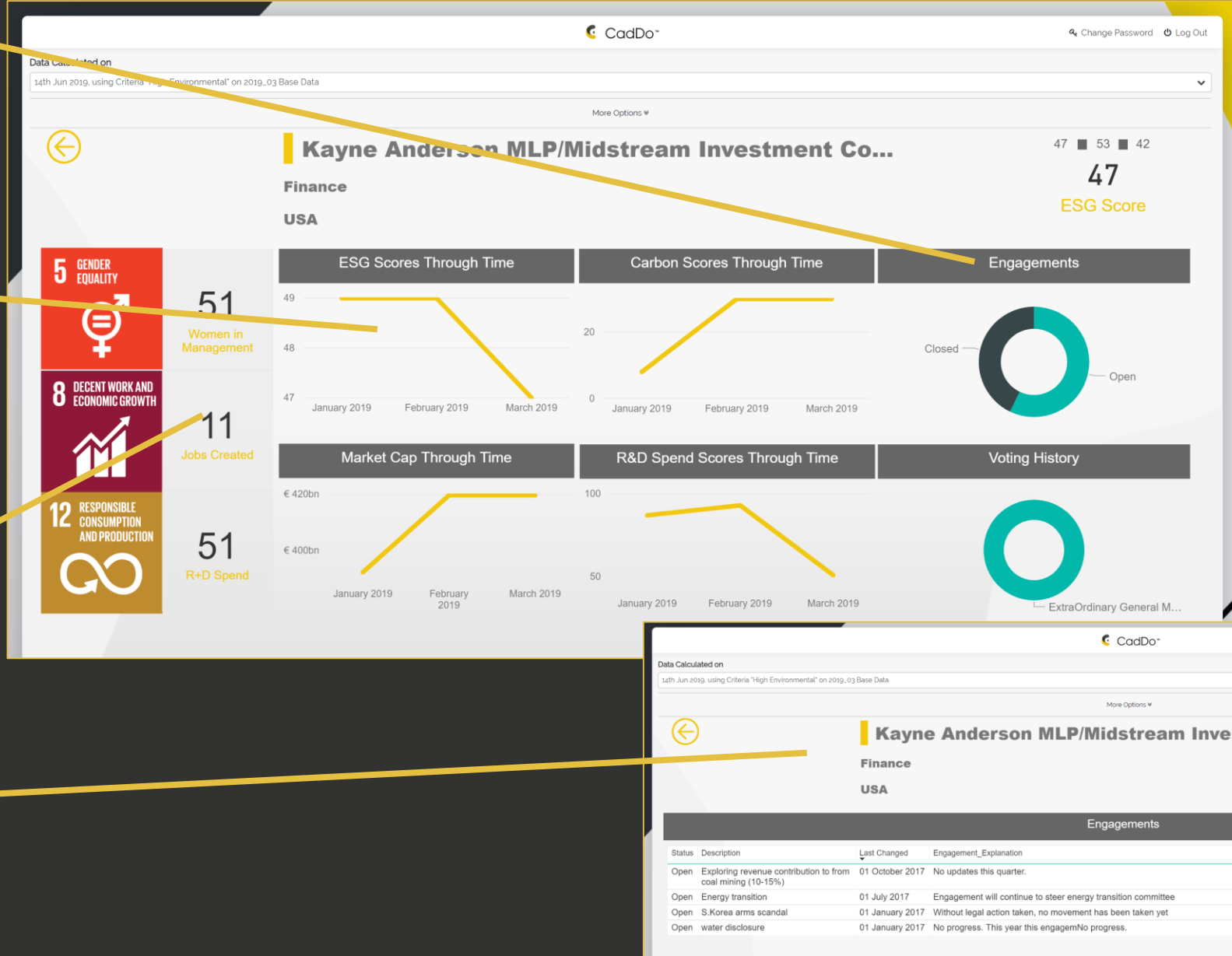
7 The breadth to include a whole range of metrics and trend analysis

Add extra
'leading'
indicators

See trend
analysis

Highlight key
SDG metrics

Drill through to
see further
details



8 The flexibility to define ESG Scores that suit your needs

Define multiple sets of criteria

Define your key metrics

Define your priorities by weighting each metric

The screenshot displays the CadDo ESG scoring interface. At the top, it shows 'Data Calculated on' for '7th May 2019, using Criteria 'High Environmental' on 2019_01 Base Data'. Below this is the 'Criteria Management' section, which includes a dropdown menu for 'High Environmental' and buttons for 'Rename', 'Add', and 'Delete'. The main area is divided into three columns: Environmental, Social, and Governance. Each column lists various metrics with a star icon and a weighting slider. The Environmental column lists 12 metrics, the Social column lists 12 metrics, and the Governance column lists 10 metrics. At the bottom, there are five graphical sliders for 'ESG Score', 'Market Cap €m', 'Carbon Footprint', 'Environment Climate Score', and 'Water Utilisation'. The 'ESG Score' slider is set to 92, 'Market Cap €m' is set to 692,843, 'Carbon Footprint' is set to 99, 'Environment Climate Score' is set to 84, and 'Water Utilisation' is set to 98. The interface also includes a 'Show Less' link and a 'List View' button.

Criteria Management

High Environmental

Rename Add Delete

Start typing to filter

Environmental

Measure	Weighting
Carbon Footprint	
Environment Climate Score	
Environment Controversy Score	
Environment Land Score	
Environment Other Score	
Environment Supply Score	
Environment Toxic Score	
Environment Waste Score	
Environment Water Score	
Flag Environment Climate	
Flag Environment Controversy	

Social

Measure	Weighting
Flag Tobacco Owner Of	
Flag Gambling Ties	
Flag Military Equipment Burma	
Flag Social Controversy	
Flag USDA	
Flag Weapon Blinding Laser	
Flag Weapon Support Service	
Human Rights Concerns Score	
Labour Rights Controversy Score	
Land Mine Safety	
UNGC Compliance	

Governance

Measure	Weighting
Governance Other Score	
Flag Governance Other	
Governance Bribe Score	
Women in Management	
Flag Governance Bribe	
Flag Governance Investment	
Flag Governance Controversy	
Governance Investment Score	
Customer Advert Assessment	
Customer Advertisement Score	
Customer Anti Practices Score	

Graphical View

ESG Score: 2 to 92

Market Cap €m: 10,000 to 692,843

Carbon Footprint: 0 to 99

Environment Climate Score: 6 to 84

Water Utilisation: 0 to 98

List View

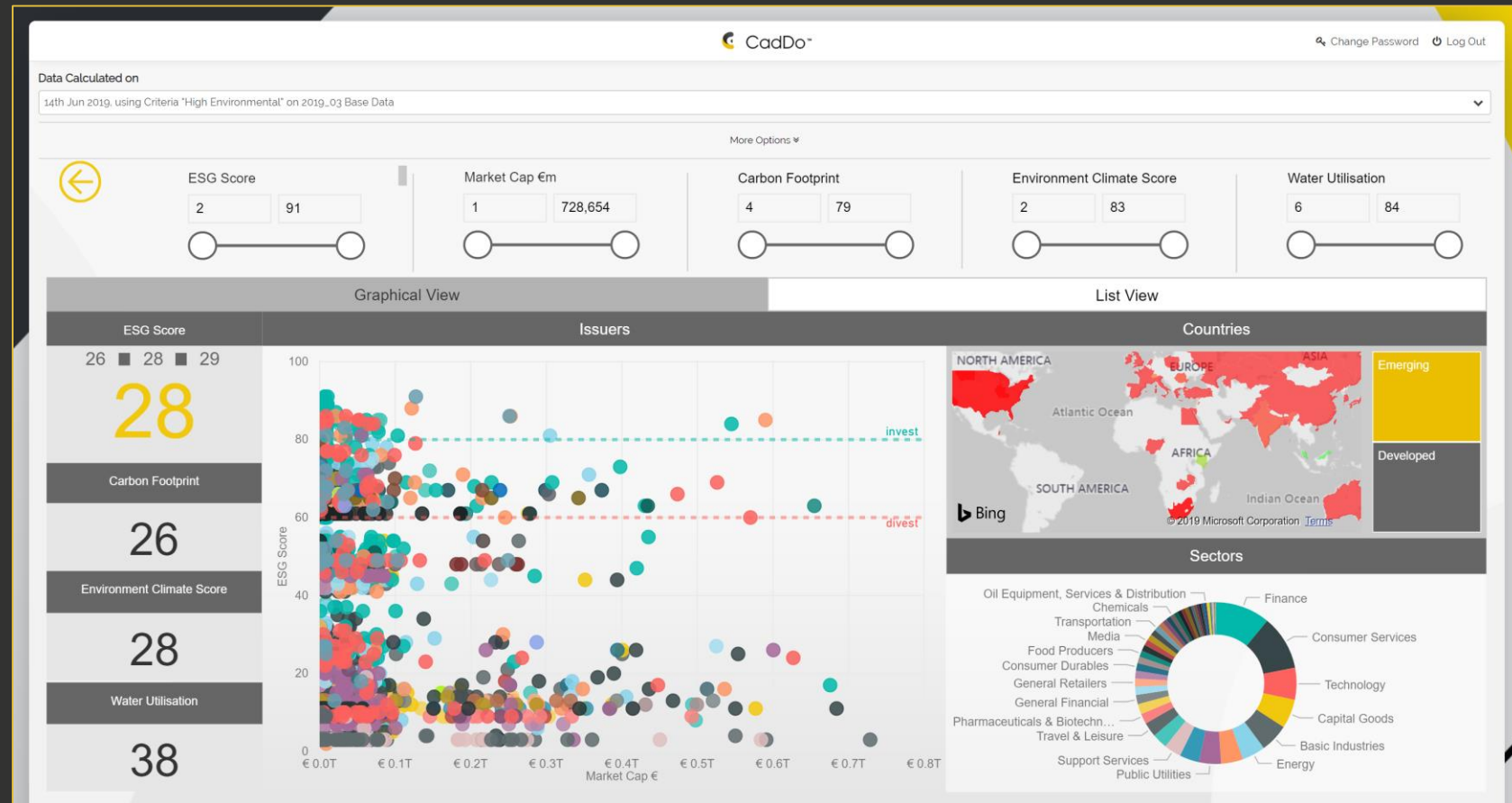


CadDo ESG

The starting point for any solution, is the ability to produce meaningful and usable ESG Scores

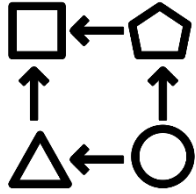
That being a **single indicator** of the overall ESG performance, in accordance with the priorities and preferences of you and your investors

CadDo ESG delivers that out-of-the-box



Live demo...





Portfolio Management is complex

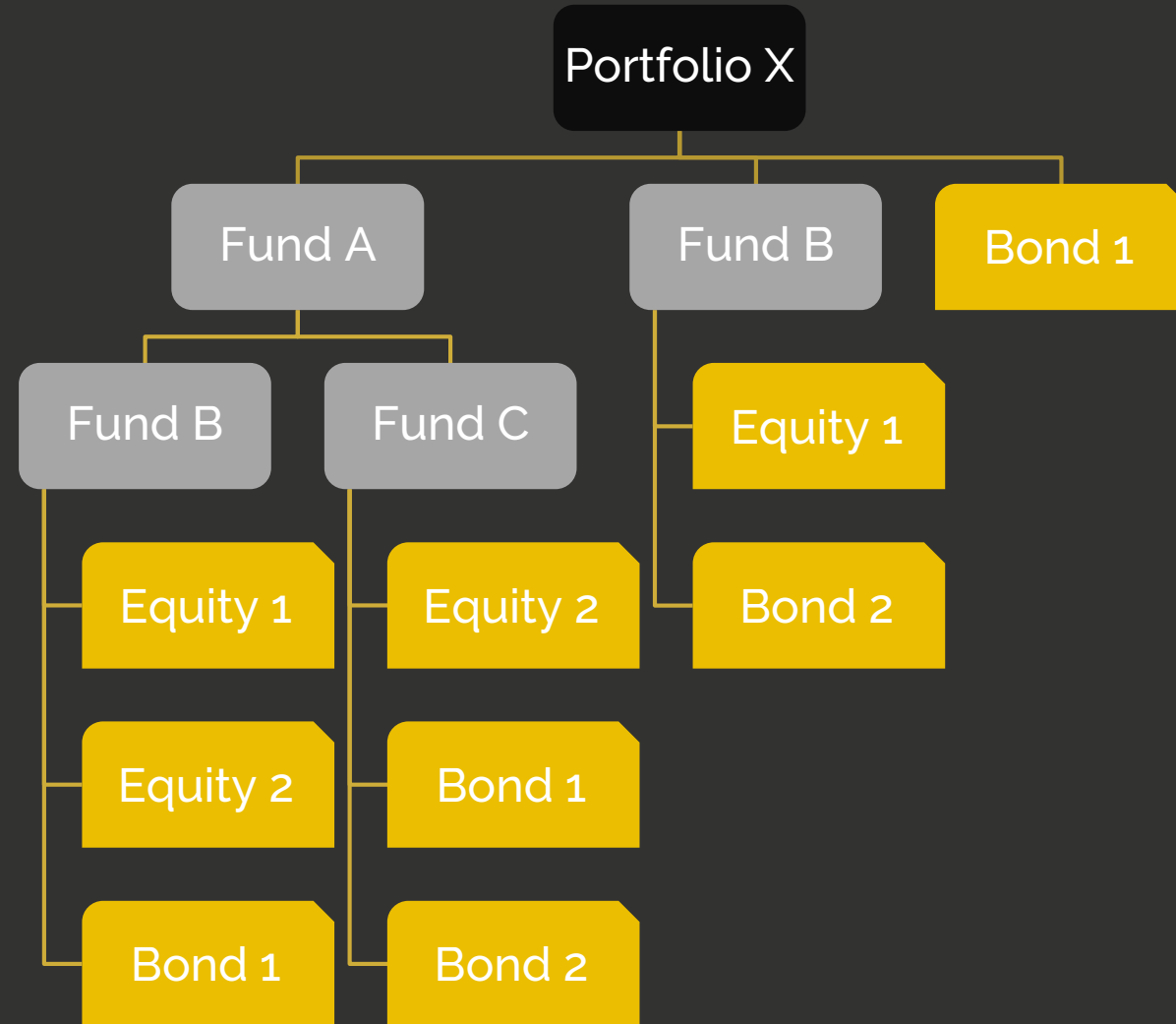
'Direct' ESG Scores can only be calculated for base securities (equities, bonds etc)

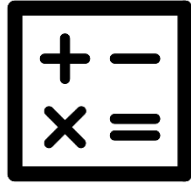
But investors buy funds, not just base securities, to build their portfolios

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?





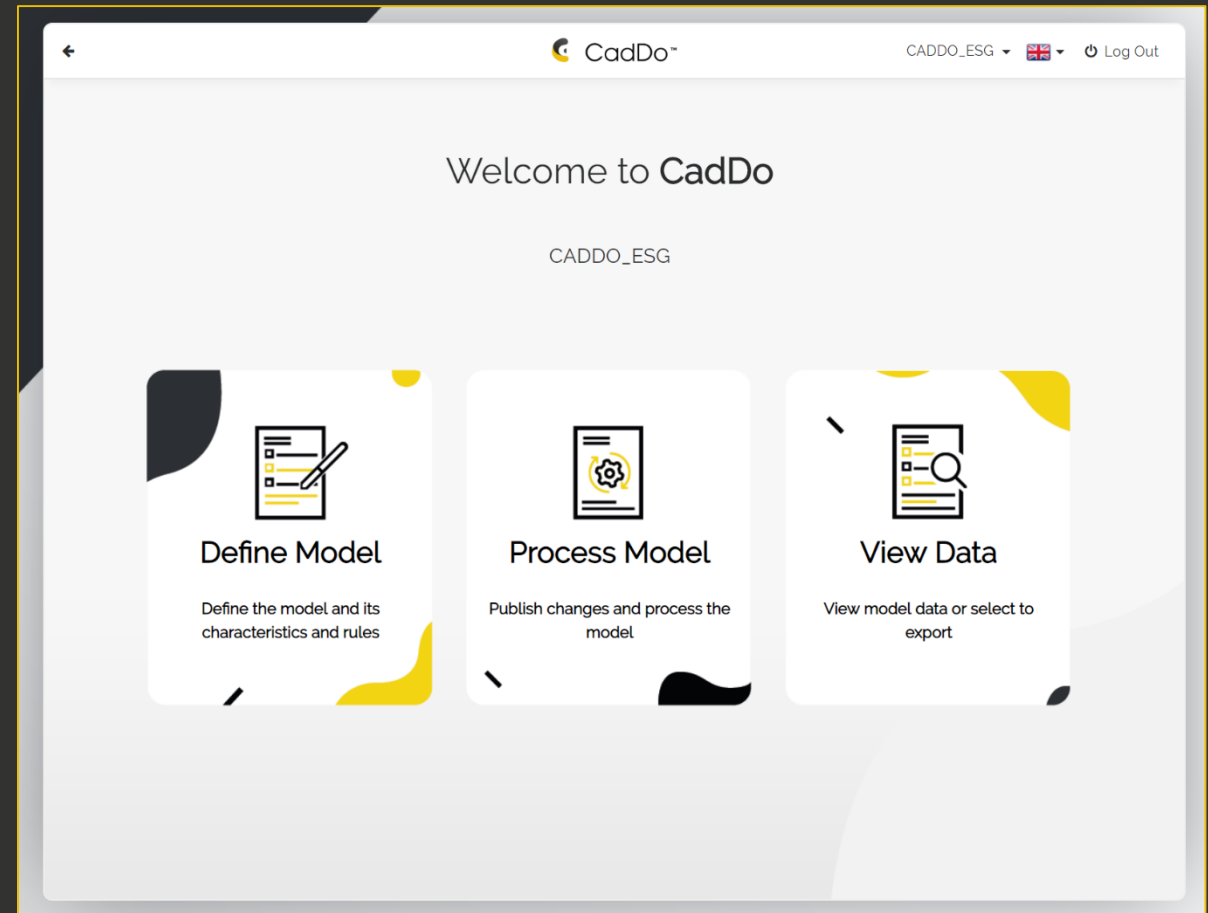
CadDo Calculate Solves The Problem

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

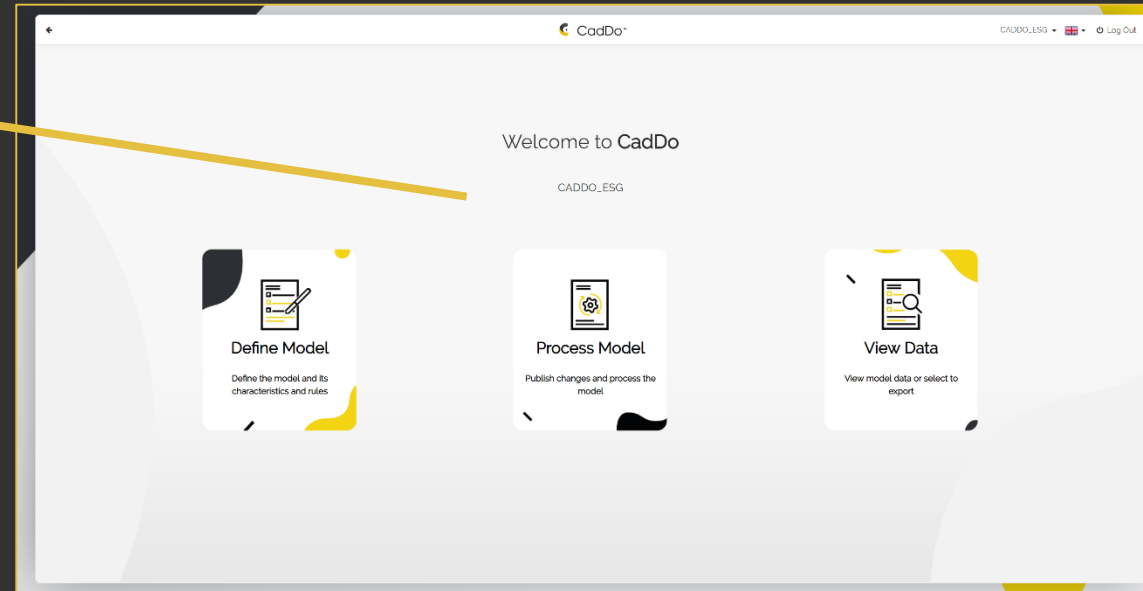
All models run within our CadDo Calculate toolset meaning logic is auditable, controlled and visible



Live demo...



Define, Process
and View data
in one place



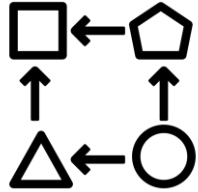
Define your
drivers and
logic

Drivers CADDO_ESG

Start typing to filter...

Driver Name	Dimension	Equation	Data Type	Driver Type	Index Type	Cube Dimension	Cube Measure	Override Equation with SQL	Notes
Carbon Emissions Scope 1	Asset	STDEV(ISSA_Carbon_Emi	DECIMAL(19, 9)	√x	∅	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Carbon Emissions Scope 2	Asset	STDEV(ISSA_Carbon_Emi	DECIMAL(19, 9)	√x	∅	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Carbon Emissions Scope 3	Asset	STDEV(ISSA_Carbon_Emi	DECIMAL(19, 9)	√x	∅	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
ESG Score	Asset	PORA_ESG_Score_Weigh	INT	√x		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Jobs Created	Asset	[ISSA_Jobs_Year_0] - [ISS	INT	√x	∅	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Percent of Women in Management	Asset	CUSTOMJOINLOOKUP_V	DECIMAL(9,7)	√x	∅	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Recycled Waste	Asset	SUM(ISSA_Recycled_Wa	FLOAT	√x	∅	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

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