

Enhancing Sustainable Investment Decisions with an ESG Analytics Dashboard

About Us:

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.

ESG Analytics dashboard effectively tracks and monitors investment performance by incorporating Environmental, Social, and Governance (ESG) factors to market risk and make informed investment decisions.

Technology:

Power BI & Power Automate

Challenges:

The future of finance goes hand in hand with social responsibility, environmental stewardship and corporate ethics. Financial institutions lack comprehensive risk assessment capabilities and overlook important ESG-related risks, such as climate change impacts, social controversies, or governance issues, which can have a significant impact on a company's financial performance and sustainability. Financial institutions struggle to evaluate the ESG performance of companies in their investment portfolios without ESG analytics. They rely solely on traditional financial metrics, overlooking important non-financial aspects of companies' performance and sustainability. This can result in incomplete investment decisions and suboptimal portfolio performance.



ESG Analytics Dashboard



SOLUTION:

Integrate MSCI ESG data, providing comprehensive ratings and scores for global companies. Metrics include carbon emissions, diversity, labor practices, and governance. Data loaded from MSCI to our backend database, scheduled with Power Automate. Historical ESG data is stored for portfolios to track changes. ESG Analytics dashboard built using Power BI for visualization of loaded metrics

SOLUTION BENEFITS:

- **Identifying ESG Risks and Enhancing Risk Management:** The ESG Analytics dashboard identifies potential ESG risks and controversies associated with companies, enabling better risk management and informed investment decisions.
- **Optimizing Portfolios with ESG Integration:** The solution integrates ESG data with the financial institution's portfolio holdings and financial data, enabling the optimization of the portfolio by incorporating ESG constraints and objectives.
- **Monitoring ESG Impact for Informed Investment Decisions:** Regular ESG monitoring evaluates the portfolio's impact on financial performance, aiding better investment decisions for customers through ESG integration.



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