

Validate how asset managers' ESG investment theses translate to outcomes

eVestment ESG Analytics for Asset Owners

With eVestment ESG Analytics, asset owners can fully incorporate ESG into their manager research and monitoring process by screening the leading institutional manager database for potential ESG managers, reviewing each manager's approach and objectives, and validating the results of a given manager's investment decisions.

eVestment ESG Analytics is powered by algorithms and data sourced from ESG information providers and scores a portfolio along a number of attributes related to Environment, Social, and Governance (ESG) factors. Results provided by ESG Analytics offer a quantitative view of the outcomes of investment decisions and can be compared to the expressed intent of a manager's investment approach, captured via eVestment's proprietary ESG questionnaire.

Key Functionality



Flagging of potential discrepancies between ESG policy and holdings



Breakdown of how a product's ESG exposures compare to Benchmark and Universes



Data and scoring across Controversies, Carbon Emissions and Sustainable Development Goals

Use ESG Analytics to:



Connect managers' ESG investment policy to investment outcomes

- Instantly see where a potential discrepancy may exist between with automatic analysis of ESG narrative vs. investment outcomes
- View a summary of manager's ESG questionnaire responses against comprehensive issuer-level data across Carbon, Drugs/Alcohol, Weapons, Human Rights, and Diversity & Inclusion metrics



Understand how a manager's ESG credentials compare to the market

- Review profiles of almost 8,000 equity strategies that have provided institutional portfolio holdings
- See how core ESG factors of Carbon Exposure, Controversies, and SDG alignment compare against Universe Medians and Benchmarks.



Dive deeper into your strategies' ESG exposures and know what the biggest drivers of metrics are

- With a full Matter subscription, you can access granular breakdowns of the contributors to ESG metrics in your products – such as which industries are largest contributors to Carbon emissions, or what categories of Controversial Flags exist in the product.

Carbon	Drugs / Alcohol
Potential Discrepancy ⓘ View Manager Response	Potential Discrepancy ⓘ View Manager Response
Has the strategy formally set any net zero targets? -- ⚠	Do you negatively screen for Alcohol Exposure? Yes ⚠
Companies with net-zero commitments 12 ⚠	Alcohol Exposure found Yes ⚠
Strategy's Carbon Emissions - Scope 1 in Metric Tonnes --	Do you negatively screen for Tobacco Exposure? No
Carbon scope emissions - Scope 1 in Metric Tonnes 55	Tobacco Exposure found No
Strategy's Carbon Emissions - Scope 2 in Metric Tonnes -- ⚠	Weapons
Carbon scope emissions - Scope 2 in Metric Tonnes 12.9 ⚠	Do you negatively screen cluster bombs, firearms, global weapons, landmines? No

