

The background of the cover features a low-angle, upward-looking photograph of a modern building with a dark, geometric facade and several balconies. Some balconies have glass railings, and the interior lights of some floors are on, creating a warm, orange glow. The building is partially obscured by a large, dark grey triangular shape in the top right corner. Two orange lines, one solid and one dotted, intersect diagonally across the image. The text 'IdealRatings®' is positioned in the upper left, with 'Ideal' in black and 'Ratings' in orange. Below it, the text 'ESG & Responsible Investment Solutions' is displayed in a bold, sans-serif font, with 'ESG & Responsible Investment' in black and 'Solutions' in orange.

**IdealRatings®**

**ESG & Responsible  
Investment  
Solutions**

# About the Solution

IdealRatings, Inc. empowers capital markets stakeholders with unique and accurate screening solutions that offer comprehensive insights of companies' adherence to Responsible Investment parameters. Covering 40K+ companies globally, users have access to more than 10Mn data entries. IdealRatings offers an array of screening processes, from Environment, Social and Governance (ESG) qualitative and quantitative data sets to revenue segmentation, business involvement flags, UN Global Compact Principles, and countries of concern. IdealRatings' users can integrate their own investment guidelines to screen out irrelevant stocks from the investable universe.

**40,000+**  
Companies

**250+**  
Data Points

## ESG Model

IdealRatings ESG model comprises three main pillars; Environment, Social and Governance with relevant subcategories; Key Performance Indicators (KPIs) with each KPI containing a series of inputs.



### Environmental KPIs

- Air Emissions
- Habitat Protection
- Waste Management
- Water Resource Management
- Environmental Management

**E**



### Social KPIs

- Supply Chain
- Human Capital
- Animal Welfare
- Consumer Protection
- Community Development

**S**



### Governance KPIs

- Business Ethics
- Anti-Corruption
- Anti-Competitive
- Reporting and Transparency

**G**

*\*Available data history 5+years*

## Key Benefits & Features

### Flexibility

Ability to customize the guidelines by selecting from 250+ Responsible Investment parameters to facilitate managing multiple investment mandates.

### Thematic Mix

Applying different investment philosophies with screening processes that include:

- ESG inclusion
- Negative screening
- Norms-based screening
- Positive screening

### Thorough Analysis

Covers ESG and ethical parameters by analyzing various internal and credible external data sources, to make sensible investment decisions.

### Rapid ROI

Minimizing the cost associated with supervision monitoring requirements and eliminating manual overheads.

### Build Investor Trust

Systemizing the compliance monitoring to reduce investment and reputation risks.

### Optimize Capital Gains

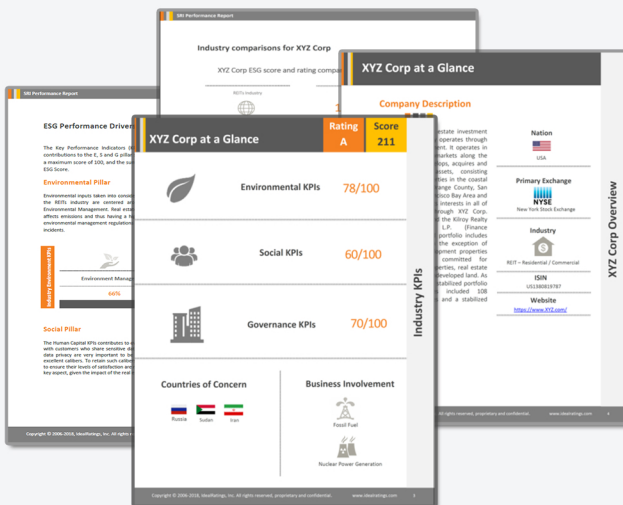
Continuous monitoring of high-risk instruments along with enlarging the investable universe for alpha generation.

# Multiple Delivery Channels



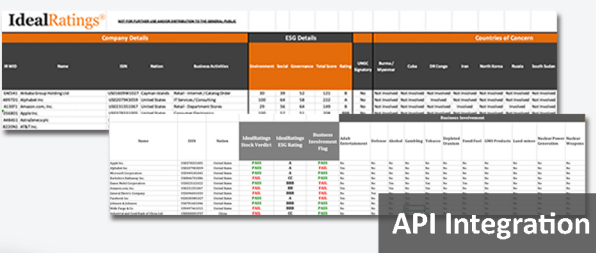
## Online Platform

IdealRatings platform empowers users with an intuitive screening tool enabling them to identify an investable universe based on their customized ethical and investment guidelines. The platform offers easier accessibility to different asset classes where users can retrieve updated data. It is a secure state of the art technology that minimizes operational cost and eliminates implementation risks.



## ESG Analytical Report

IdealRatings' company reports provide full ESG assessment of the corporation under investigation. An industry analysis is written relative to the E, S & G drivers highlighting the most and least important aspects (KPIs). The company's E, S & G actual performance is detailed moving among all industry relative KPIs. Its E, S & G scores are compared to global, regional and market size benchmarks. Negative screening is conducted on the company including: the company's business involvement in controversial activities and countries of concerns.



## API Integration

## Data Feed

IdealRatings data feed offers universe screening services with customized delivery formats for smooth integration with investors' back offices and trading platforms. IdealRatings data team delivers custom universe files based on investor selection of guidelines, file format and frequency. IdealRatings' data feed can be disseminated over various delivery channels.



# Negative Screening

## Business Involvement & Revenue Segmentation

With varying definitions of non-permissible income and thresholds, IdealRatings' business involvement screening allows users to identify companies involved in specific business activities with a pass/fail flag or a tolerance threshold (i.e., no more than 10% of annual revenue) based on their own responsible and ethical investments guidelines.

*\*Available data history 10+ years*

### Sample of Business Involvement & Revenue Segmentation

- Alcohol
- Tobacco
- Defense
- Firearms
- Cluster bombs
- Land-mines
- Nuclear weapons
- Fossil fuel
- Uranium mining
- Chemical & biological weapons
- Oil sands
- Hydraulic fracking
- Nuclear power generation
- Gambling
- Brown coal
- Black coal
- Adult games
- Adult entertainment
- Donation-based fertility
- Embryonic stem cells
- Abortion/contraception medication
- GMO
- Animal Testing and Cruelty
- Thermal and Metallurgical Coal
- Renewable Energy



## Countries of Concern

Countries of concern screening identifies companies that operate and/or sell in specific countries marked with international controversies, global sanctions, and/or other issues. Examples for the sources identifying these countries are; U.S. Department of State, Treasury Department's Office of Foreign Asset Control, and European Union External Action Service. Countries list can be customized according to the preference of the investor.

## About IdealRatings®

IdealRatings Inc., headquartered in San Francisco, is a global solutions provider for Responsible Investments. IdealRatings solutions are licensed by leading financial institutions, asset managers, data vendors, asset owners and brokerage firms in over 25 countries.

## Contact Us

50 California Street  
Suite 1500  
San Francisco  
CA 94111  
[www.idealratings.com](http://www.idealratings.com)

@Idealratings

