

# ACA Vantage For ESG

A one-stop solution for ESG portfolio monitoring

- » Scan company ESG profiles
- » Collect data
- » Report and benchmark

ACA Vantage for ESG is a flexible software solution that solves data management challenges across private equity and private debt portfolios. With ACA Vantage for ESG, you gain visibility to monitor and oversee your portfolio companies' environmental, social, and governance posture.

Our team of ESG experts will help you select monitoring criteria that, align with ESG commitments and frameworks; meet investor expectations; and, are material to portfolio company's industries.

## What to expect from ACA Vantage for ESG



### ESG Profiling and Controversy Screening

Understand the ESG risk and impact data points of each portfolio company.

#### Our solution:

- » Utilizes an independent ratings methodology aligned with global standards
- » Leverages a database of over 10,000 public and private companies, tracking over 600 ESG metrics across 80 categories
- » Continuously monitors the entire portfolio without any impact on the portfolio companies to identify controversies and other negative news events, using local language sources from around the globe



### Seamless Data Collection

Custom-select metrics and issue questionnaires to portfolio companies, with responses aggregated in a central dashboard.

#### Our portal provides:

- » Metrics library of over 600 metrics, including templates of widely accepted frameworks (EDCI (ESG Data Convergence Initiative), IDP (Integrated Disclosure Project), SFDR (Sustainable Financial Disclosure Regulation))
- » Guidance and tools to help portfolio companies understand and report metrics
- » Workflow tracker to monitor portfolio progress in completing questionnaires
- » Independence and security. Portfolio companies own and control their data, always



### Monitoring and Analytics

Highly customizable reporting to show company, portfolio, and metrics focused reporting for investors and other stakeholders.

#### Our analytics dashboards include:

- » Filtering of ESG metrics at every level, allowing clients to assess performance by company, industry, fund, and portfolio
- » Ability to drill down to see underlying reporting and sources of individual data points
- » Portfolio company dashboards, allowing each portfolio company to see its results in context to peers to inform strategy and help prioritize areas of focus for year-over-year progress
- » Ability to create custom analytic dashboards that meet your methodology and reporting preferences



## Benchmarking

Data is only as useful as the context around it. ACA's robust proprietary benchmarks are available across metrics.

### Our benchmarking:

- » Focuses on precision, comparing each portfolio company to its peers. ACA's database tags companies based on over 45 industries and 200 sub industries, and then identifies peers based on revenue and employee count
- » Includes the ability to define any custom peer set
- » Compares companies against international standards (e.g., SASB (Sustainable Accounting Standards Board) topics, UN SDGs (United Nations Sustainable Development Goals)
- » Tracks company progress over time



## Expert Reviews

Expert support to review each company's ESG practices and provide tailored recommendations for improvements to improve operations, reduce risk, and create value.

### Our advisors will:

- » Meet with company representatives to discuss ESG practices and review policy and other documents to understand the current state
- » Identify and discuss material risks and opportunities with portfolio companies
- » Develop a report of recommended actions, and a roadmap to help prioritize
- » Help leverage economies of scale across your portfolio to reduce costs for you and your portfolio companies
- » Align oversight to acquisition value drivers to smooth exit diligence and increase valuations



## Streamlined Reporting

Highly customizable reporting to show company, portfolio, and metrics focused reporting for investors and other stakeholders.

### Our platform provides:

- » Format-ready reporting for regulatory related obligations such as SFDR (Sustainable Financial Disclosure Regulation) & EET (European ESG Template)
- » Carbon and climate reporting for the entire portfolio (peer-modelled estimates available where directly-collect data is not)
- » Easy-to-export raw data and direct API connections available to internal deal tracking platforms
- » Direct reporting to EDCI (ESG Data Convergence Initiative)
- » A build-your-own reporting tool, allowing tailored reporting for Board Meetings and Annual General Meetings



## Carbon Footprinting

Estimate and/or calculate company and portfolio carbon emissions.

### Our platform provides:

- » Easy-to-use carbon calculator that generates PCAF-aligned (Partnership for Carbon Accounting Financials) estimates to meet your reporting obligations
- » Experts to support companies with additional handholding to inventory emissions sources, as required
- » Availability of peer-modelled estimates where actual data from companies is not accessible

# Benefits of ACA Vantage for ESG

## For Private Credit, Venture Capital, & Securitized Asset Portfolios

- » Achieve full coverage of ESG analysis across all investment names, closing a compliance gap that may exist from other data providers. New companies can be added in 48-72 hours, leveraging our proprietary data collection and monitoring methods (AI + Analysts)
- » Obtain ESG company and peer data to benchmark practices, all without disruption to the companies
- » Easily implement your custom ESG scoring methodology or align with your existing methodology, including accessing aligned scorecards and dashboards on ACA Vantage
- » Daily controversy monitoring and alerting to stay on top of significant negative news events across your portfolio
- » Physical climate risk analysis, including in-depth, address-level analysis across 18 climate risk categories. Includes assessment of value of investments at risk of significant climate hazards

## For Private Equity

- » Metrics, analytics, reporting, all in one platform to use for various internal/external purposes, streamlining and simplifying ESG data management, making sense of next steps to understand how best to support portfolio companies
- » Option to build long term partnerships with portfolio companies
- » Daily controversy monitoring and alerting to stay on top of significant negative news events across your portfolio

## Why ACA

ACA's ESG practice helps hundreds of managers navigate their ESG compliance and data/analytics challenges. With heightened regulatory focus on ESG globally, clients trust ACA, the leading governance, risk, and compliance (GRC) advisor in financial services, to not only advise on ESG strategies, but also manage risk exposures.

ACA Vantage for ESG is powered by ACA's ESG Data & Analytics solution, Ethos. Ethos aggregates public and private data to provide transparent ESG risk and impact analysis on listed and non-listed issuers. Our research, powered by AI and fundamental research, offers fast, deep, and actionable insights into the ESG risk and impact of a portfolio, fund, or individual asset.

ACA's ESG practice is comprised of ESG/sustainability professionals who support managers and companies across a variety of industries with ESG materiality assessments, strategy planning/execution, and stakeholder reporting, among other things. Our award-winning solutions are designed to help firms monitor ESG risks and opportunities, and help companies grow sustainably.

## For more information

Contact us at [www.acaglobal.com](http://www.acaglobal.com)

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