

INCORPORATE ESG DATA INTO YOUR PORTFOLIO ANALYTICS

Our full suite of analytical tools can illustrate how the securities within a portfolio are performing against ESG metrics

[Eikon's](#) Portfolio Analytics tools enable ESG data to be more consumable, for portfolio construction, optimization and security selection offering transparency into ESG performance.

Within the Portfolio Analytics app you can:

Measure and report ESG performance at the portfolio level

Eikon's Portfolio Analytics tool helps you measure and report on aggregated ESG scores or against a particular aspect of ESG in your portfolio.

You can report against any aspect of the portfolio's ESG profile (e.g., gender diversity, carbon exposure) to asset owners. You can also perform an attribution report to test how an ESG tilt is helping or hurting performance. For example, does focusing on carbon-light companies in the portfolio improve risk-adjusted returns?

As well as using the built-in reporting tools in Eikon, you can use the Eikon Excel® functionality to create your own portfolio analysis tools. We also provide ESG templates in Eikon Excel to get you started.

Easily measure and report on ESG performance at a client-holding or portfolio level, and seamlessly integrate that with traditional financial performance and reporting.

Identify companies with strong ESG practices or exposure to ESG risks

Easily identify companies in the portfolio with underlying ESG issues that could present risk and give yourself the opportunity to engage with management or reposition capital.

With the increasing emphasis on ESG, asset owners are asking their managers to identify companies with strong ESG practices or exposure to ESG risks. Eikon brings together ESG data, QA Point and Portfolio Analytics – enabling the creation of historical factors to incorporate into your analysis. Portfolio managers can then demonstrate what performance would have looked like if sustainable investing guidelines had been part of the original mandate.

In Eikon, you can quickly interpret how companies are performing relative to their peers and where a company's ESG weaknesses and strengths lie. This offers insight into risk exposure faster than ever before.

Meet carbon footprint reporting obligations with pre-set templates for portfolio reporting

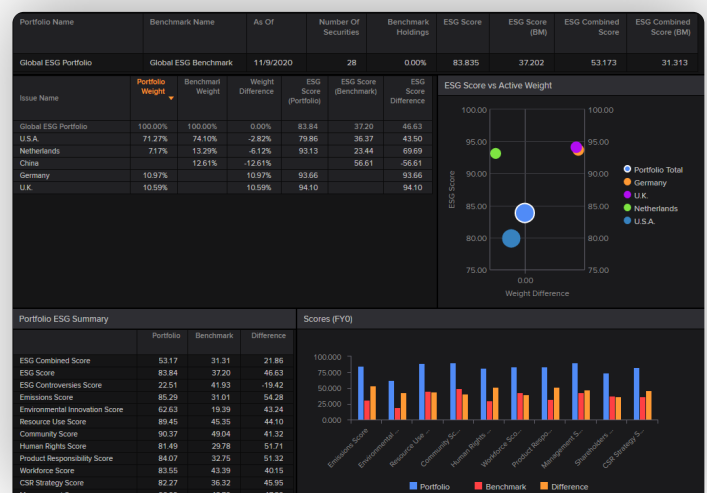
In the Portfolio Analytics app, we have a template which allows users to see what a portfolio looks like from a carbon standpoint. This enables you to meet regulatory compliance requirements in Europe (e.g., France) and other jurisdictions.

In addition, we have developed sophisticated carbon data and estimate models to help asset managers with companies in the portfolio that don't report on their CO₂ emissions. Our patented models are fully transparent providing an estimated value when a reported value is not available.

Meet carbon footprint reporting obligations with out-of-the-box portfolio reporting – fully integrated with reported and estimated CO₂ emissions for companies.

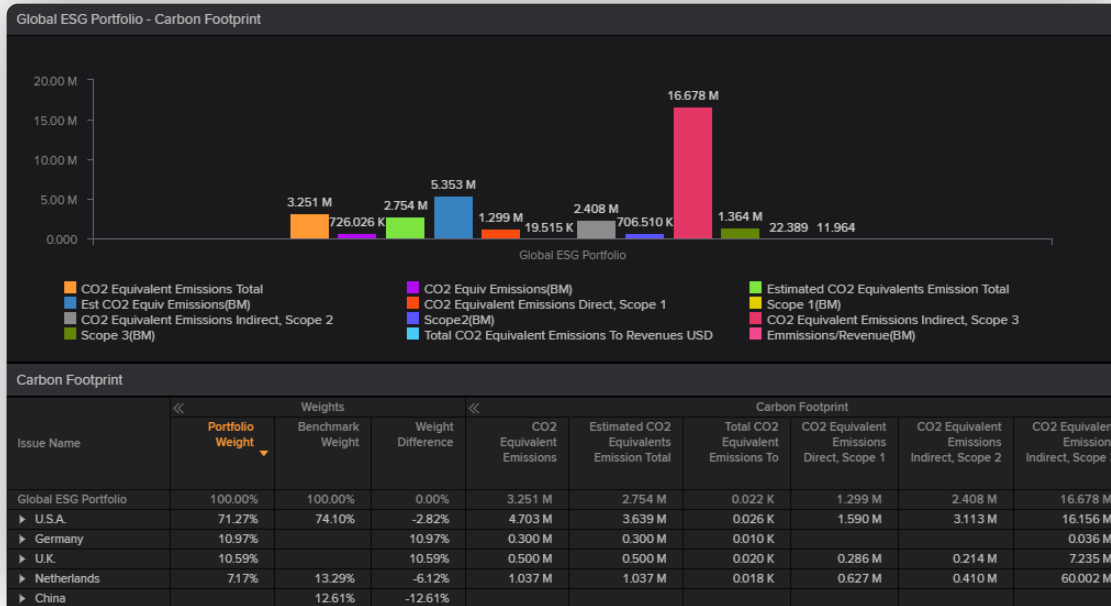
ESG in Eikon Portfolio Analytics

Portfolio Analysis: Integrating ESG factors into analysis



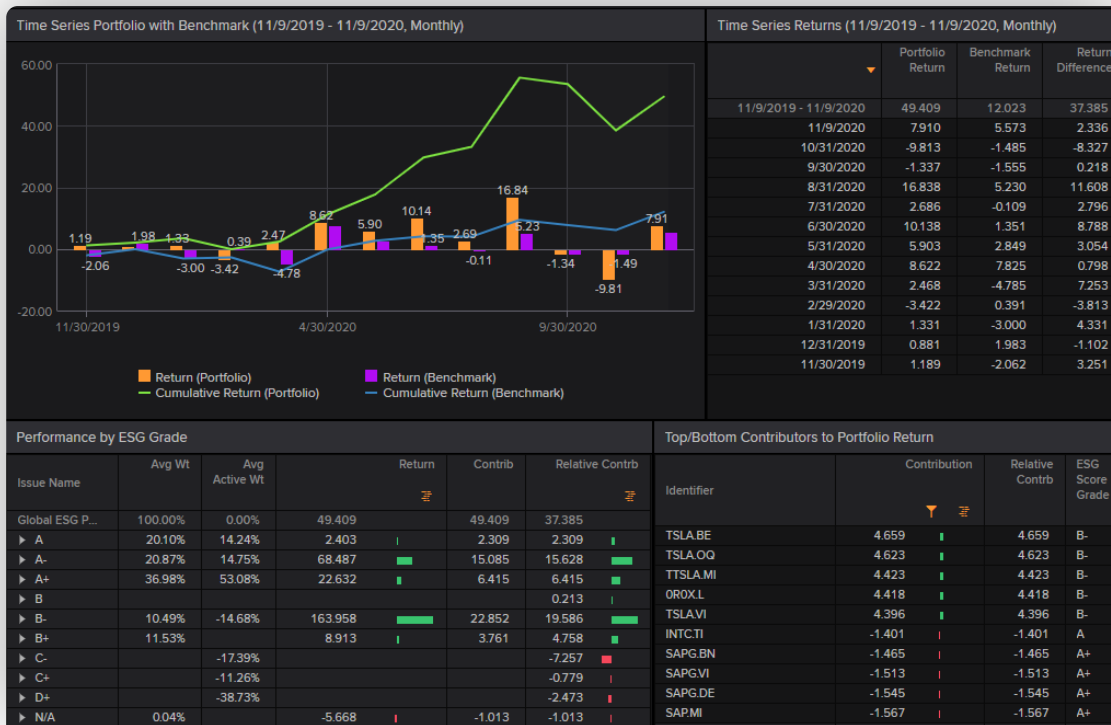
Review the portfolio country asset allocation and ESG factor exposures against the benchmark.

Portfolio Analysis: Carbon footprint



Analysis of the Carbon Footprint report to visualize your investments impact to carbon emission.

Portfolio Analysis: Portfolio vs. Benchmark performance



View cumulative and sub-period returns in the 'Performance' tab to see whether your portfolio outperformed the benchmark, and review the active weight and relative contribution to return by ESG grade.

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