

# Archer<sup>®</sup> ESG Portfolio Management

Unlock the potential of your investments

## The Challenge

The investment community plays a pivotal role in the environmental, social, and governance (ESG) world. As the momentum behind impact investing continues to grow, institutional investors are increasingly motivated to assess the ESG footprint of their investment portfolios. However, this task presents significant challenges, as portfolio managers must execute a tedious process of collecting and reviewing an extensive volume of data points across their investment portfolios, which can encompass anywhere from a few dozen to thousands of investment companies. As a result, this manual approach leads to a long and inefficient execution cycle.

Another challenge is the lack of standardization in ESG data, which results in differing methodologies across ESG research providers. This lack of standardization can lead to conflicting interpretations of ESG data between investors, reducing the effectiveness of this approach.

## The Archer ESG Portfolio Management Advantage

With Archer ESG Portfolio Management, institutional investors looking to maximize the ESG impact of their investments now have a modern solution at their fingertips. General and Limited partners (GP/LP) and investors no longer need to sacrifice efficiency to accurately measure the ESG performance of their portfolio companies. By leveraging Archer ESG Portfolio Management's modern approach designed to facilitate the gathering and analysis of ESG portfolio data, it is now possible for asset managers, venture capitalists, private equity firms, commercial lenders, and more to collect valuable portfolio intelligence and make informed decisions.

Archer ESG Portfolio Management is tailored specifically for the investment community, enabling efficient data collection and analysis across large portfolios. Unlock the potential of your investments with this innovative solution today!

## Features

- A portfolio hierarchy that establishes the investor–investee structure.
- An ability to collect and report metrics based on the embedded ESG Data Convergence Initiative (EDCI) framework.
- An ability to create and collect custom-based ESG metrics.
- Aggregation of metrics at the portfolio and country/region levels.
- Dashboards and visuals to analyze portfolio performance across geographies, sectors, and categories of ESG.

## Benefits

- Gain organizational efficiency by utilizing portfolio structures to manage the investor-investee hierarchy, promoting streamlined communication and decisionmaking processes.
- Standardize reporting by leveraging the Embedded ESG Data Convergence Initiative (EDCI) framework that allows to generate ESG data in comparable metrics.
- Create and collect custom-based ESG metrics for more tailored insights and assessments, aligning with unique investment strategies and goals.
- Aggregate metrics at the portfolio GP/LP and country/region level to provide a holistic view of portfolio performance, identifying trends and opportunities at different scales.
- Utilize graphical reporting and dashboards to analyze portfolio performance across geographies, sectors, and ESG categories, enabling better strategic planning and risk management.



## About Archer

Archer is a leading provider of integrated risk management (IRM) solutions that enable customers to improve strategic decision-making and operational resilience with a modern technology platform that supports qualitative and quantitative analysis driven by both business and IT impacts. As true pioneers in GRC software, Archer remains solely dedicated to helping customers manage risk and compliance domains, from traditional operational risk to emerging issues such as ESG. With over 20 years in the risk management industry, the Archer customer base represents one of the largest pure risk management communities globally, with more than 1,200 customers including more than 50% of the Fortune 500.

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