

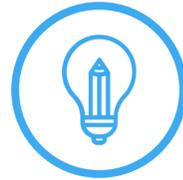
# Impact Data & Reporting Services

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Presentation for

 **MIRABAUD**

# Who is Impaakt?



## Our goal

To show you the true impact of investments with easy access to reliable, affordable, and on-demand impact data – beyond ESG ratings.



## Our accolades



## Our clients



DE PURY PICTET TURRETTINI





# The case for impact data.

Going beyond ESG to Impact

# A market now moving **beyond ESG to Impact**

## ESG data...

- Measuring CSR performance
- Focus on practices, processes and policies

### Single Materiality



Companies

Planet & Society



## ...to Impact data

- Measuring impact
- Focus on products and processes

### Double Materiality



Companies

Planet & Society

**Impaakt is positioned to answer these new needs.**

# The world is changing

## Unprecedented challenges...

-  Climate change
-  Biodiversity loss
-  Raising inequalities
-  Pollution
-  Pandemics
-  Resource depletion





## ...and powerful drivers

-  Public finance under strain
-  Increased public scrutiny
-  Strong generation shift
-  New consumption patterns
-  Stringent regulation

...lead to deeply re-thinking  
the role of business and  
the role of investors.

# And so is the market

## How profitable is the business?

Focus: Financial Performance



1970's

**Expectation from Business:**  
Making money.

**Expectation from Management:**  
Team **gets things done.**

**Data Providers:** Bloomberg, Factset Thomson Reuters, Morningstar, S&P, etc

## How responsible is the business?

Focus: Business Practices



2000's

**Expectation from Business:**  
Making money in a responsible way.

**Expectation from Management:**  
Team **does things right.**

**Data Providers:** MSCI ESG, Sustainalytics, ISS ESG, etc.

## How impactful is the business?

Focus: Business Models



2020's

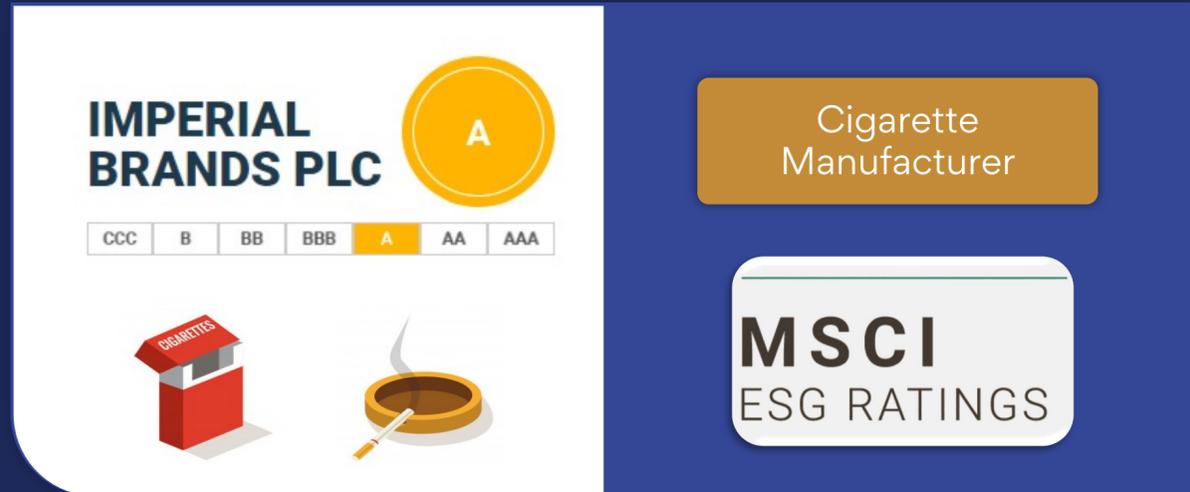
**Expectation from Business:**  
Making money and contributes to common good.

**Expectation from Management:**  
Team **does the right thing.**

**Data Providers:** Impaakt, TrueValueLabs, CDP, etc.

# Existing ESG Data is not the solution

ESG Data also have other limitations



IMPERIAL BRANDS PLC **A**

CCC B BB BBB **A** AA AAA

Cigarette Manufacturer

MSCI ESG RATINGS

The image shows a credit rating scale from CCC to AAA with 'A' highlighted. Below the scale are icons for a pack of cigarettes and a lit cigarette. To the right, a blue box identifies the company as a 'Cigarette Manufacturer' and a white box shows the 'MSCI ESG RATINGS' logo.

Vs.



PFIZER INC. **B**

CCC **B** BB BBB A AA AAA

Pharmaceutical Company

ESG Data focuses on CSR and Practices, not impacts.

The image shows a credit rating scale from CCC to AAA with 'B' highlighted. Below the scale are icons for a pill bottle and a syringe. To the right, a red box identifies the company as a 'Pharmaceutical Company' and text states 'ESG Data focuses on CSR and Practices, not impacts.'



## Risk-focused

Focuses on the risk the environment and social factors have on the company, not how the company impacts people/planet



## Self-declared

Source of information heavily relies on the companies themselves



## Outdated

Relying on questionnaires means data used is usually old and not reactive



## Biased

Scores are biased in favour of large companies



## Untransparent

“Tick-the-box” approaches still prevails in a number of areas (in particular, social themes)

# Why Impact Data?

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## Impact Data:

Looks at the whole impact from top to bottom, and everything in between.

## Environmental Social and Governance (ESG) Data:

What is on the surface is easier to see and measure but doesn't provide the full picture of the impact.

Below the surface: companies have far greater impacts that aren't so easily measured, not just via their products and services but how they behave and operate and what communities and environments they touch.

# The case for impact data.

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Good enough reasons...

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## Client demand

Clients want to know they are investing in companies that have a positive impact on the world.



## Regulatory environment

New taxes and other regulatory mechanisms increase urgency for impact data.



## Need for differentiation

Show you are a leader by becoming impact certified.



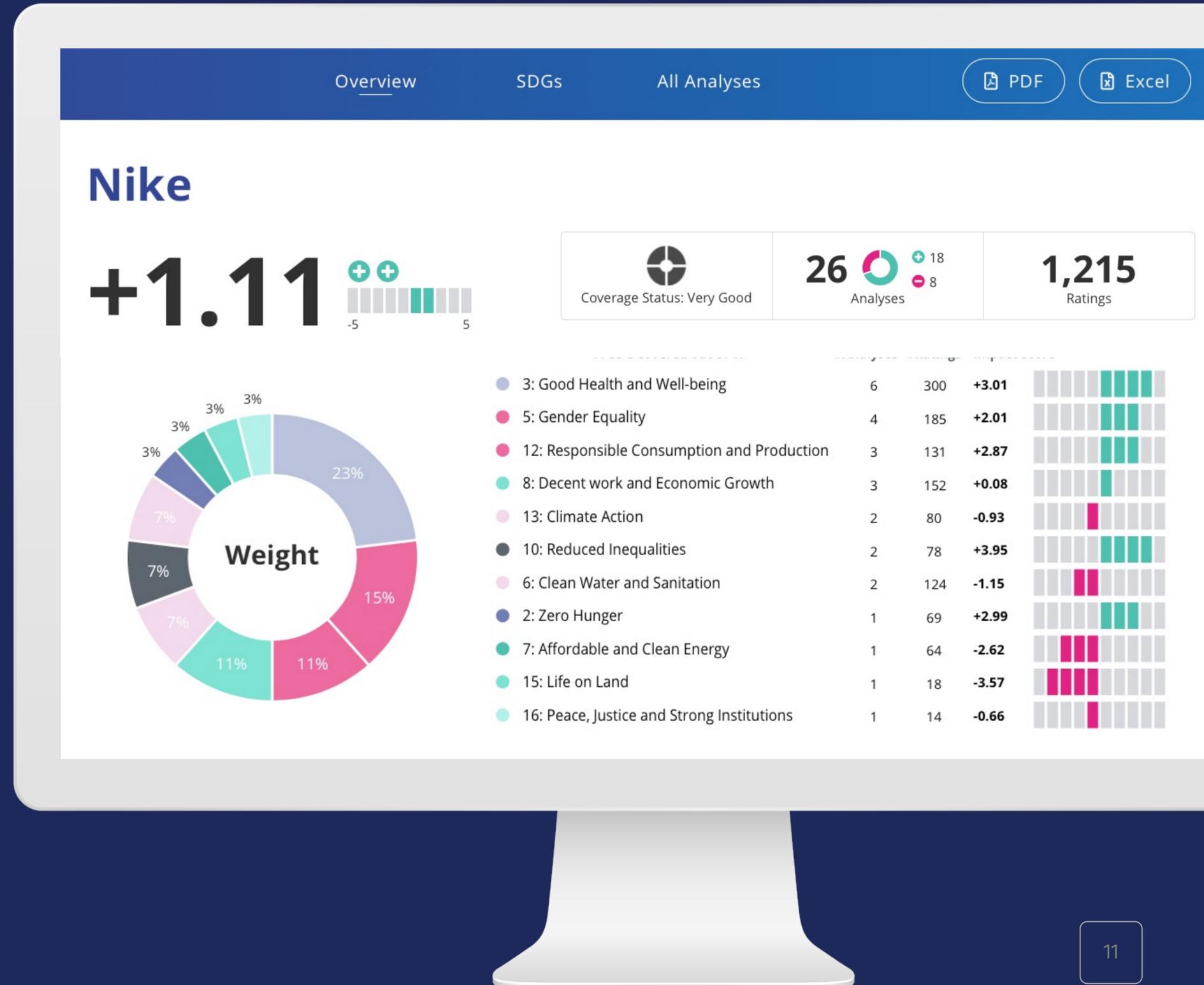
## Portfolio performance

Growing acceptance of sustainability as a driver of long-term performance.



# Why Impaakt?

The platform for **better, deeper, faster impact data.**



# What problems do we solve?



## Time consuming data analysis

Impact data is neither standardized nor centralized. It takes a huge amount of time to analyse to make use of the information.



## The headache of materiality

Determining the materiality of each issue is a complex and subjective task. Each provider has its own methodology for weighing each issue against the other, resulting a wide divergence in scores.



## Lagging data

ESG data is based on annual questionnaires completed by a company. They are outdated by the time they reach you and give no indication of what the future holds.

### Good news! We do this for you.

- +150K hand-picked, vetted sources for you to reuse and fuel your own research.
- +23K summaries written on every important impact topic.
- +120K hours of tedious prep work you don't have to do!

- Our +40K impact assessors collectively determine the materiality of each issue.
- The result: double materiality determined by civil society, not by a single expert.

- Impact assessments are done in **real-time**.
- All our content is updated by our community dynamically<sup>\*</sup>, not annually
- Our forecasting module<sup>\*</sup> uses collective intelligence to estimate future trends.

<sup>\*</sup>To be released soon

# What makes us unique?

## Collective Intelligence



### UNPARALLELED BRAIN POWER

- 40,000 contributors working together to grasp the complexity of impact

### THE VOICE OF GLOBAL SOCIETY

- Comparing the materiality of different impacts is judgemental and must be done collectively, not by a single expert.

### REAL-TIME ASSESSMENTS

- Ratings are done on the platform every day and scores change dynamically

### GREENWASHING-PROOF

- 200,000 open data sources hand-picked by our community, the majority of which do NOT come from the companies themselves.

# How does it work?

Collective Intelligence  
done right

Supported by AI



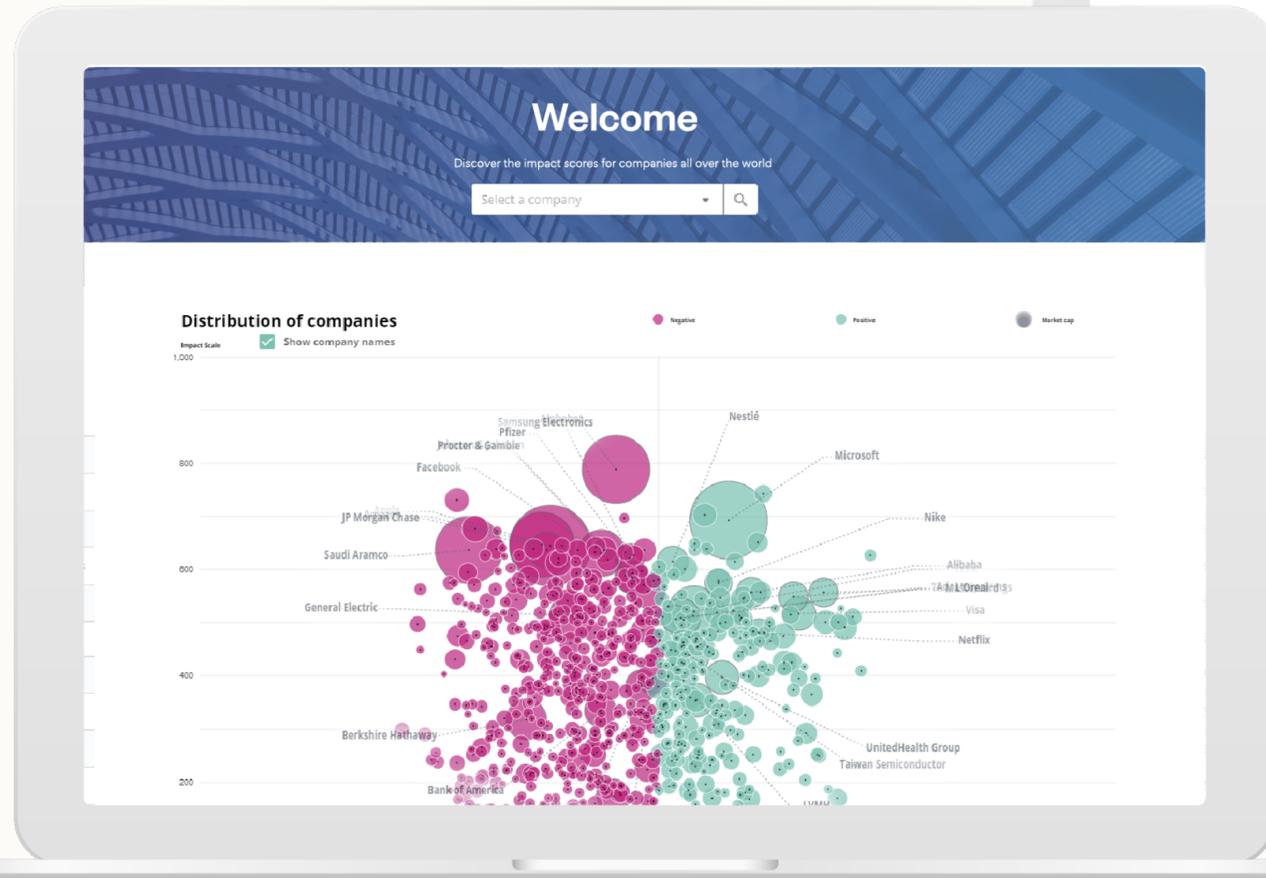
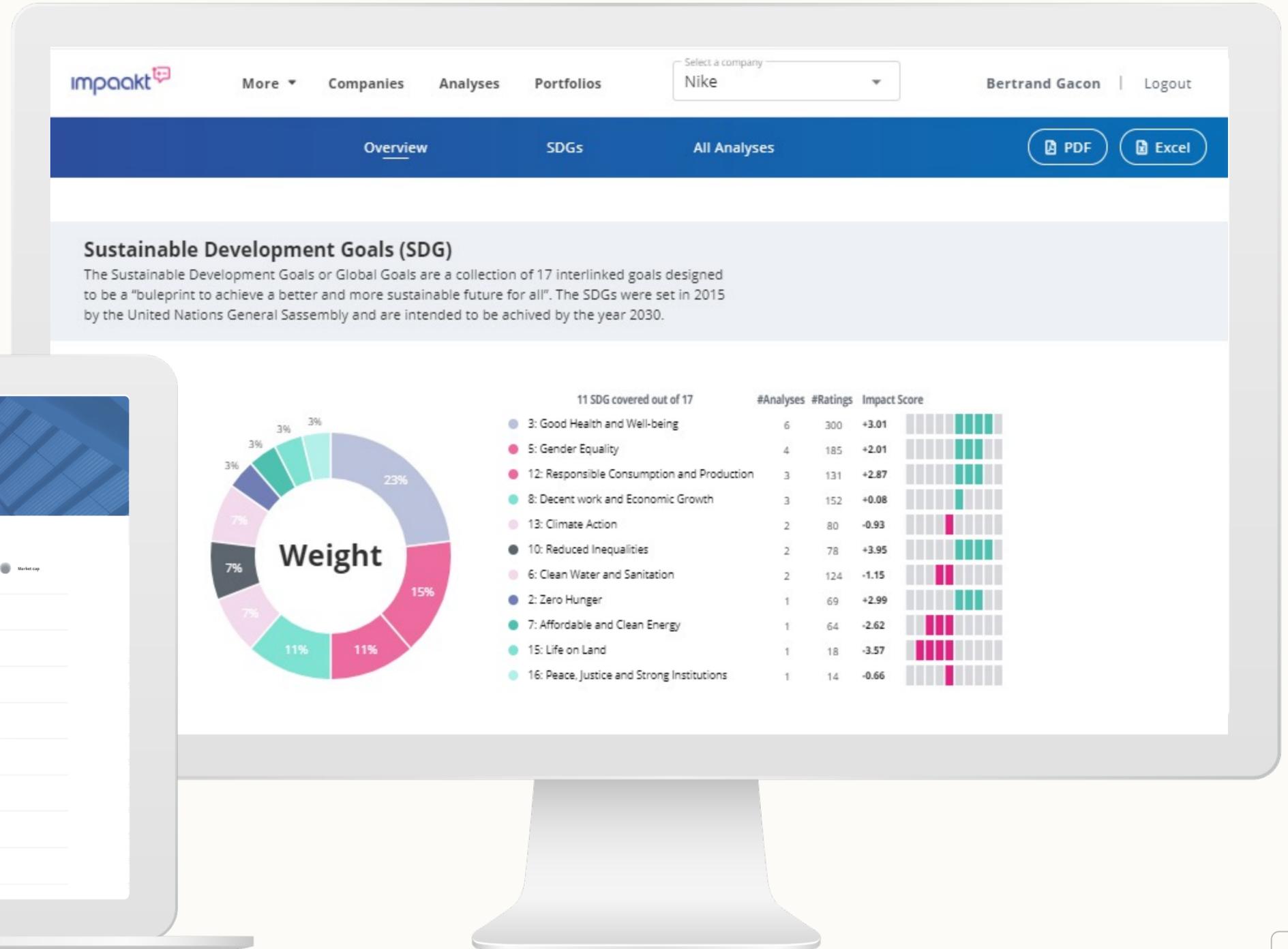
Innosuisse

Swiss innovation agency laureate  
≈CHF 1 million R&D program in partnership  
with Swiss leading universities



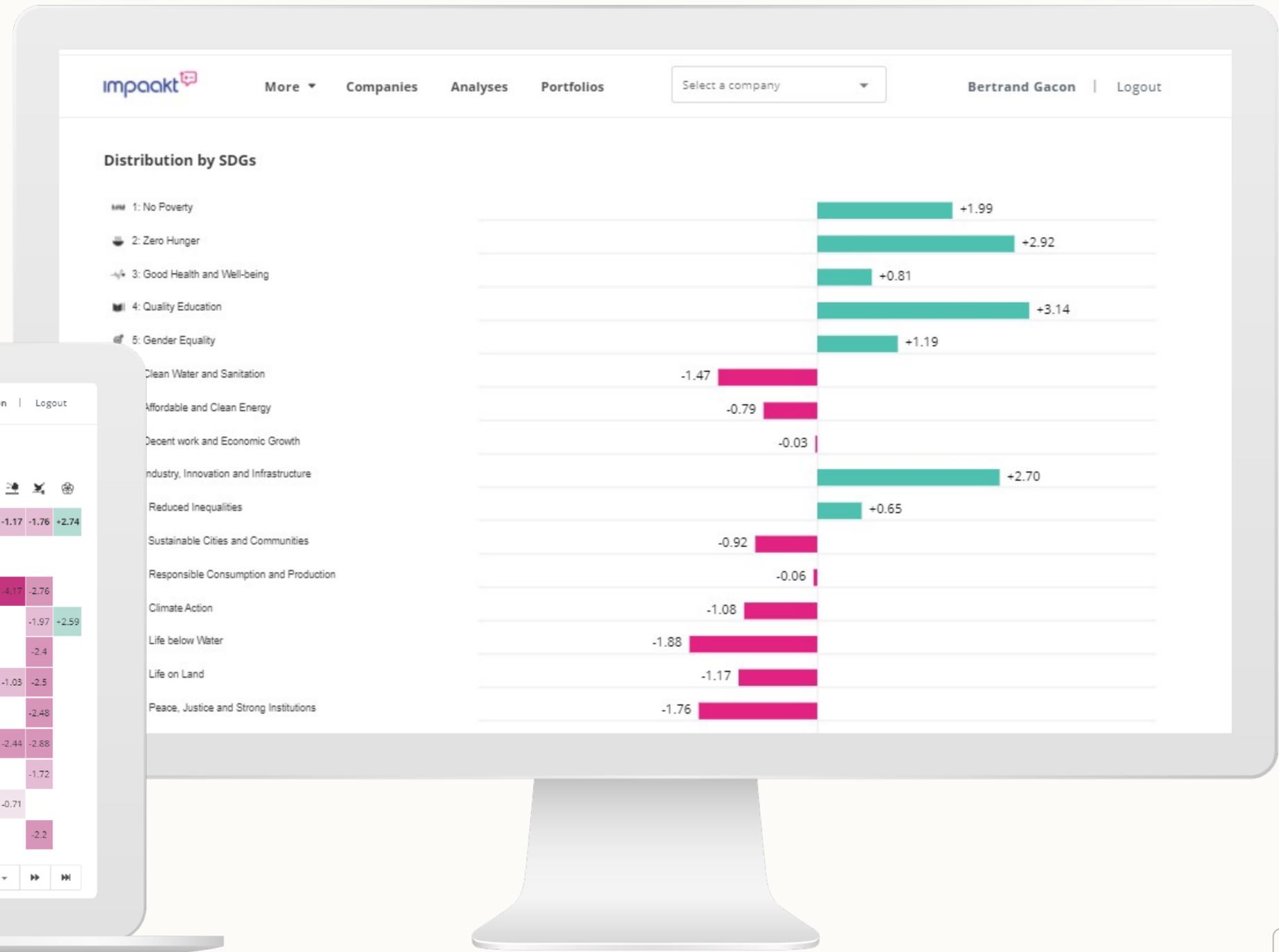
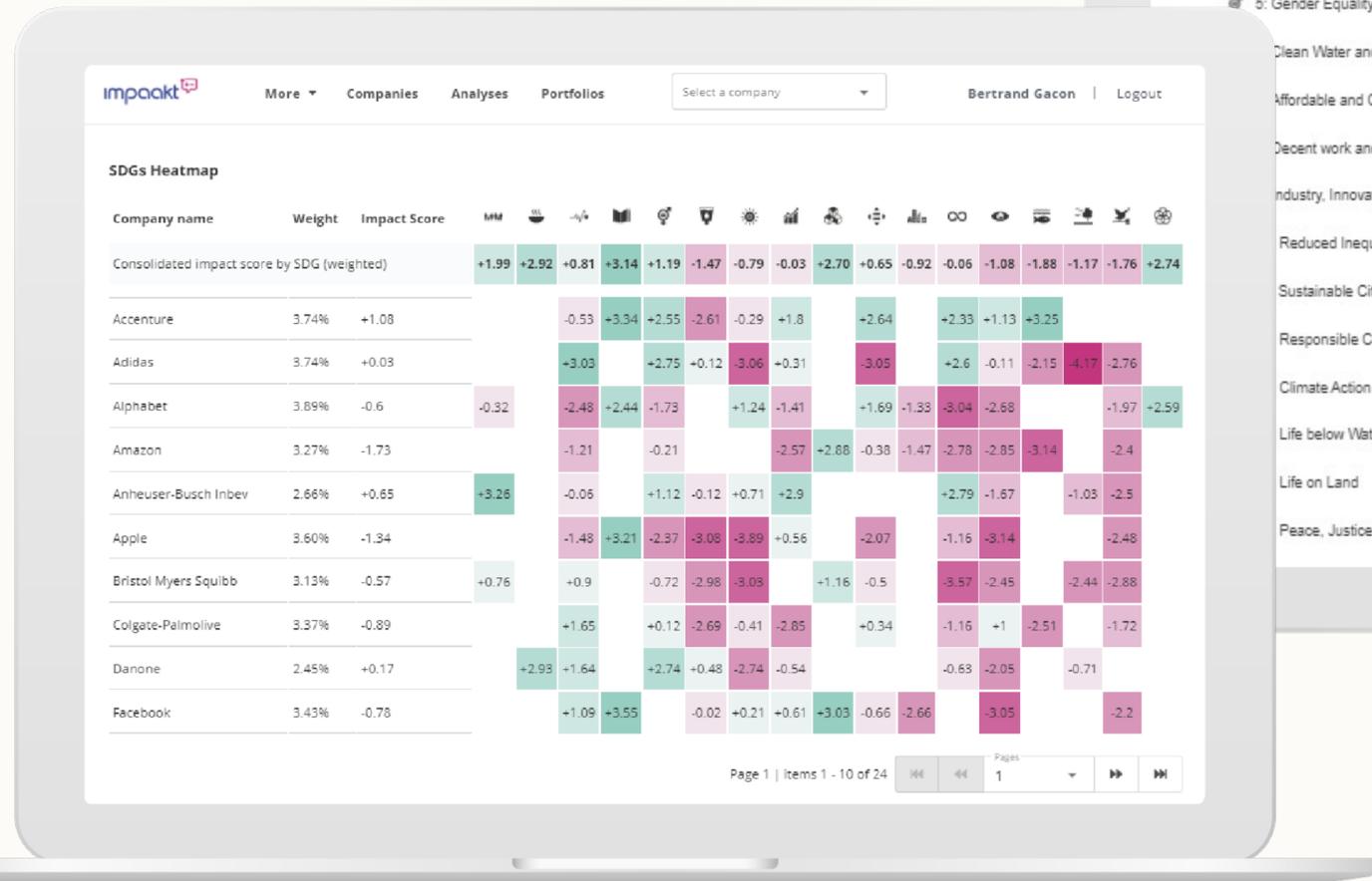
Figures as of 20/03/2022

# A powerful client interface





# A powerful client interface



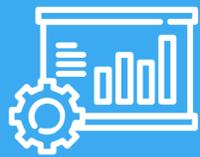
# What we offer

Advanced research & analytics at your fingertips.



# What our clients do with our research

## Asset Managers



### Portfolio diagnostic and reporting

Advanced data visualization  
Regulatory requirements



### Portfolio management

Portfolio construction / stock selection  
Active & passive strategies



### Engagement

Identify key issues to discuss  
Prepare meeting with companies' management



### Product Creation

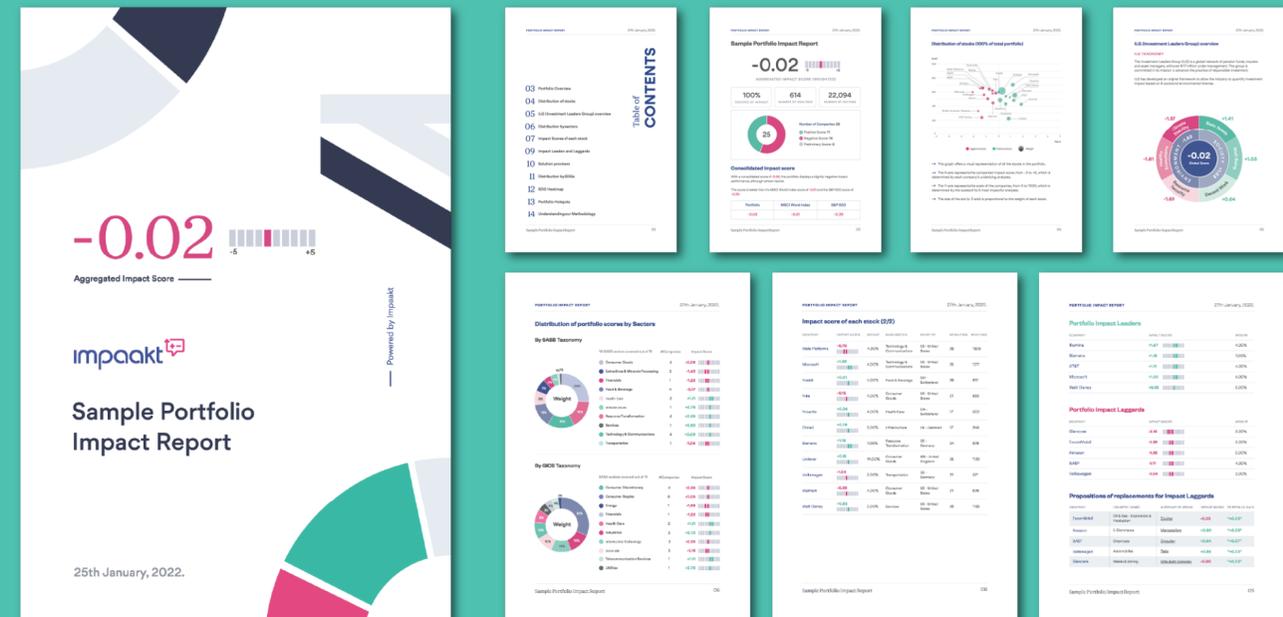
Idea origination  
Thematic impact funds

## Asset Owners



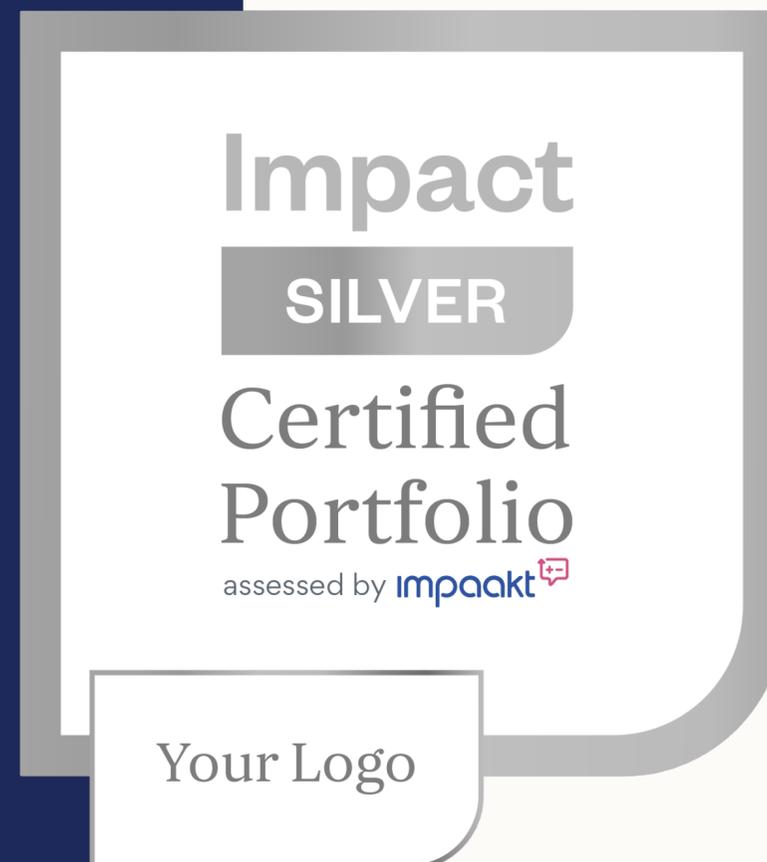
### Portfolio diagnostic and reporting

- Standard impact report
- Advanced impact report
- “Deep-dive” impact report and recommendations



# Put Purpose in Your Portfolio

Get the Impaakt stamp of approval for your portfolio so you can demonstrate the positive impact your investments have on the environment and society.



# Training & Certification

## A successful training program.

-  Over **3K registrants** to our program every single week, coming from more than **60 countries**
-  Over **120K** participants received the full training as of today
-  500 participants successfully completed the program and became Certified Impact Analysts



### Highly Reviewed

All attendees rated the content 4\* or above.

Successful completion gives users a Certification they can display on LinkedIn.

IMPACT  
MANAGEMENT  
PROJECT

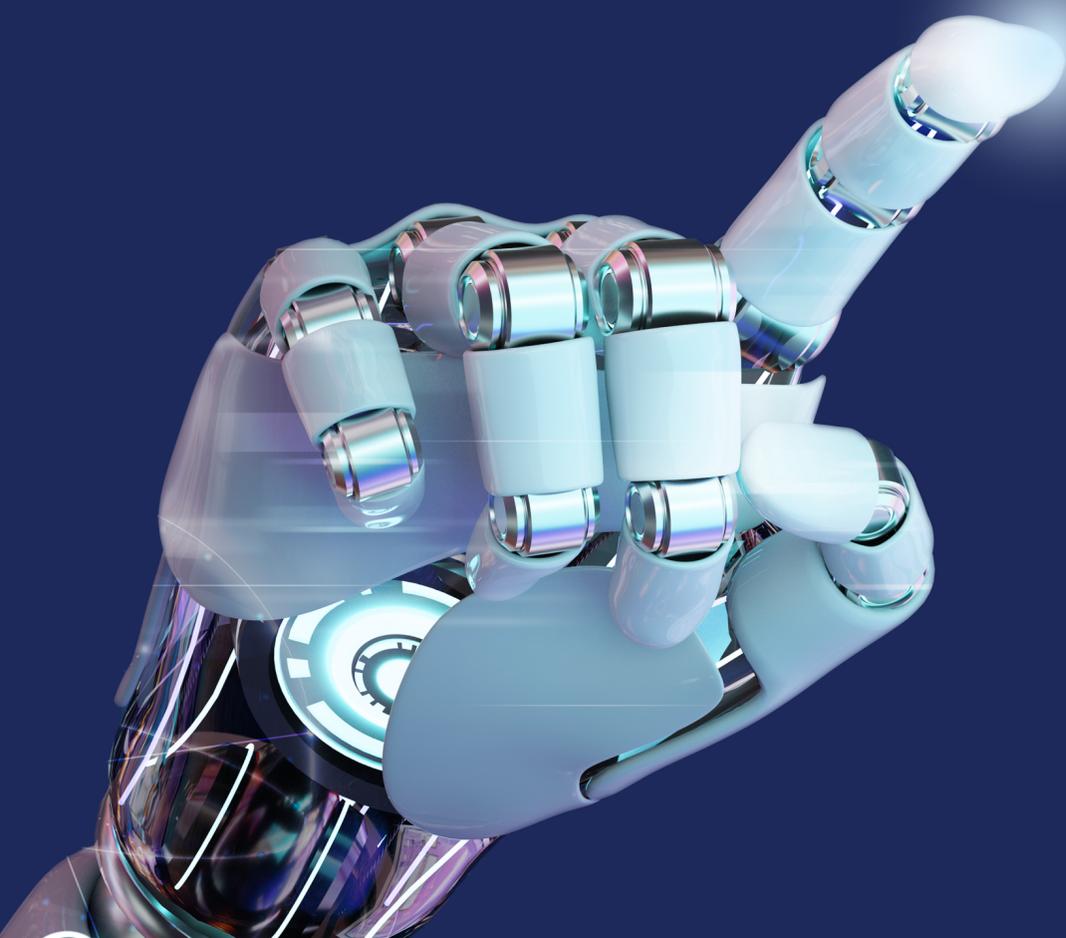


### Program Content

Key concepts and methodology.

Industry frameworks (Logic Model, IMP, product lifecycle, SASB...)

Tools and best practices.  
Exercises and assignments.

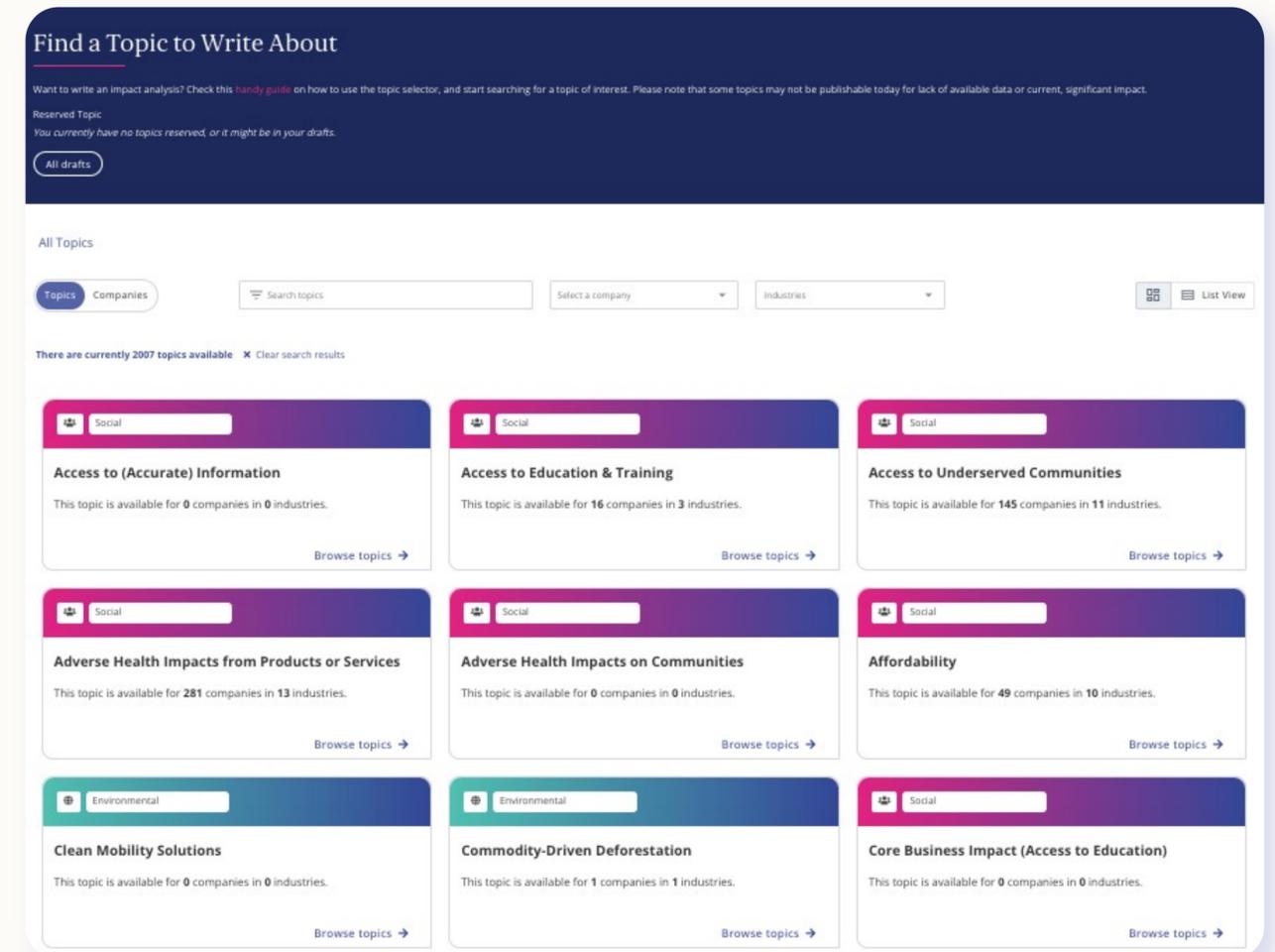


# Artificial Intelligence powered research process.

## The Topic Selector.

Most important impact themes identified per industry based on SASB's taxonomy, enriched with new topics that are not well covered by SASB (mission, etc.)

List of keywords associated to each topic  
AI powered clustering keywords into Topics, validated by the Content Team.



Find a Topic to Write About

Want to write an impact analysis? Check this [handy guide](#) on how to use the topic selector, and start searching for a topic of interest. Please note that some topics may not be publishable today for lack of available data or current, significant impact.

Reserved Topic  
You currently have no topics reserved, or it might be in your drafts.

[All drafts](#)

All Topics

Topics Companies    [List View](#)

There are currently 2007 topics available [x](#) Clear search results

<b>Access to (Accurate) Information</b> This topic is available for 0 companies in 0 industries. <a href="#">Browse topics</a>	<b>Access to Education &amp; Training</b> This topic is available for 16 companies in 3 industries. <a href="#">Browse topics</a>	<b>Access to Underserved Communities</b> This topic is available for 145 companies in 11 industries. <a href="#">Browse topics</a>
<b>Adverse Health Impacts from Products or Services</b> This topic is available for 281 companies in 13 industries. <a href="#">Browse topics</a>	<b>Adverse Health Impacts on Communities</b> This topic is available for 0 companies in 0 industries. <a href="#">Browse topics</a>	<b>Affordability</b> This topic is available for 49 companies in 10 industries. <a href="#">Browse topics</a>
<b>Clean Mobility Solutions</b> This topic is available for 0 companies in 0 industries. <a href="#">Browse topics</a>	<b>Commodity-Driven Deforestation</b> This topic is available for 1 companies in 1 industries. <a href="#">Browse topics</a>	<b>Core Business Impact (Access to Education)</b> This topic is available for 0 companies in 0 industries. <a href="#">Browse topics</a>



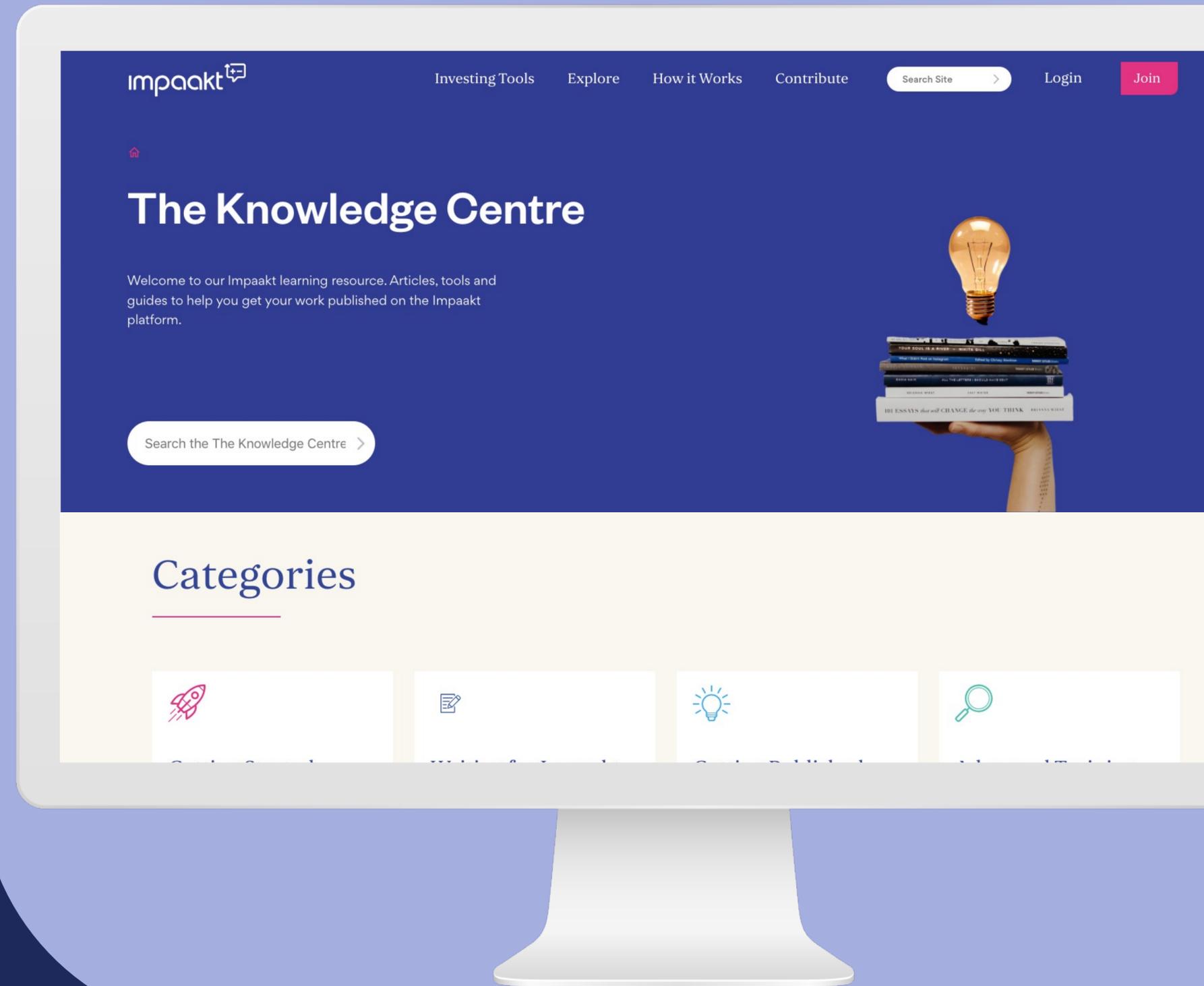
# Active collaborative learning.

Continuous Improvement of our community's skills.

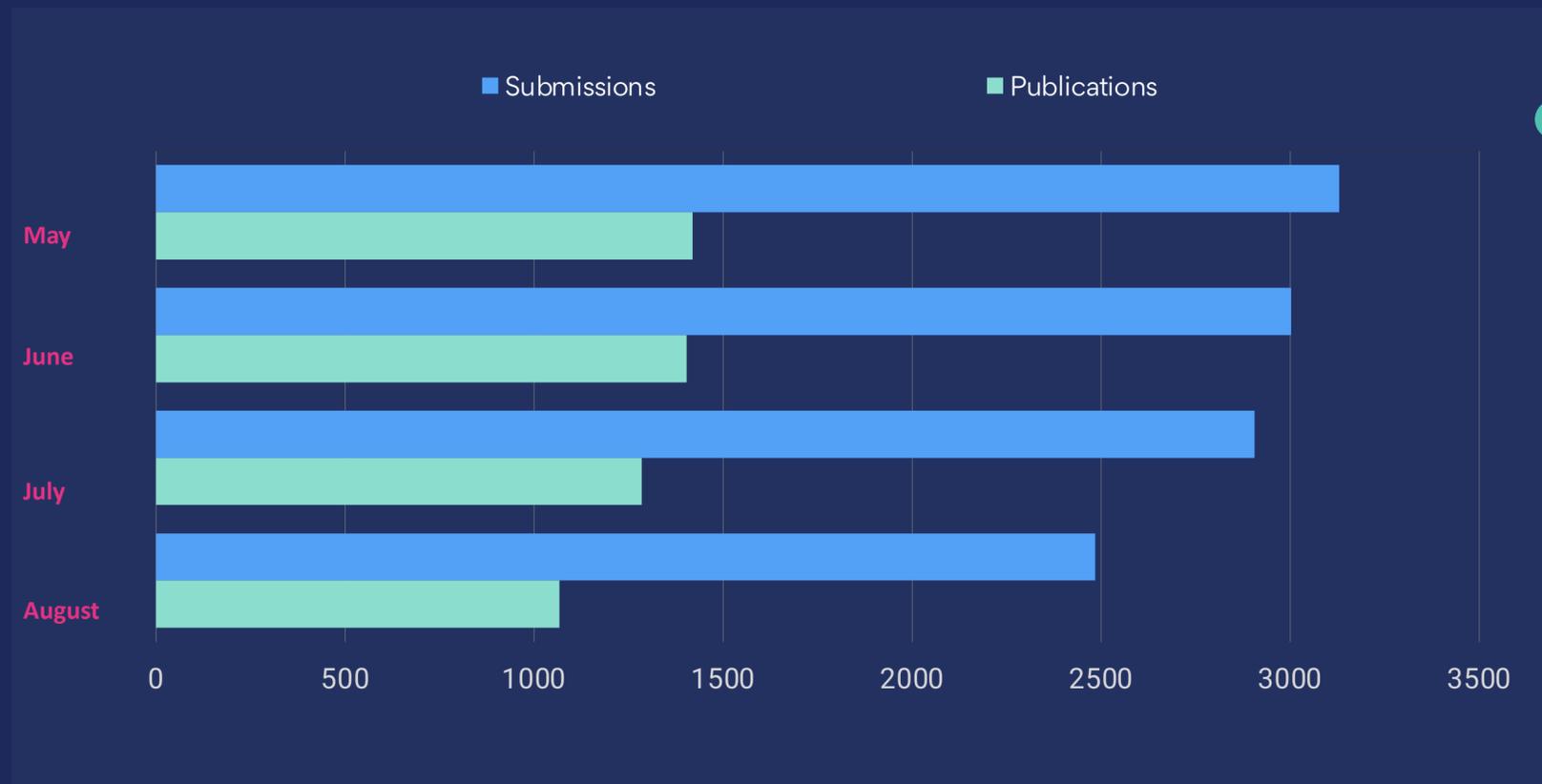
A collaborative tool including a knowledge center, resources guidelines and tutorials available to all our Certified Impact Analysts

Possibility for each contributor to reach out to peers (or to the Impaakt team specialists) to ask for second opinions or share best practices/doubts

Continuous learning and leveraging the power of the community to constantly improve our skills and processes.



# Review & Quality control process



## Continuous Improvement of Quality

Only Certified Impact Analysts can submit an Analysis for review.

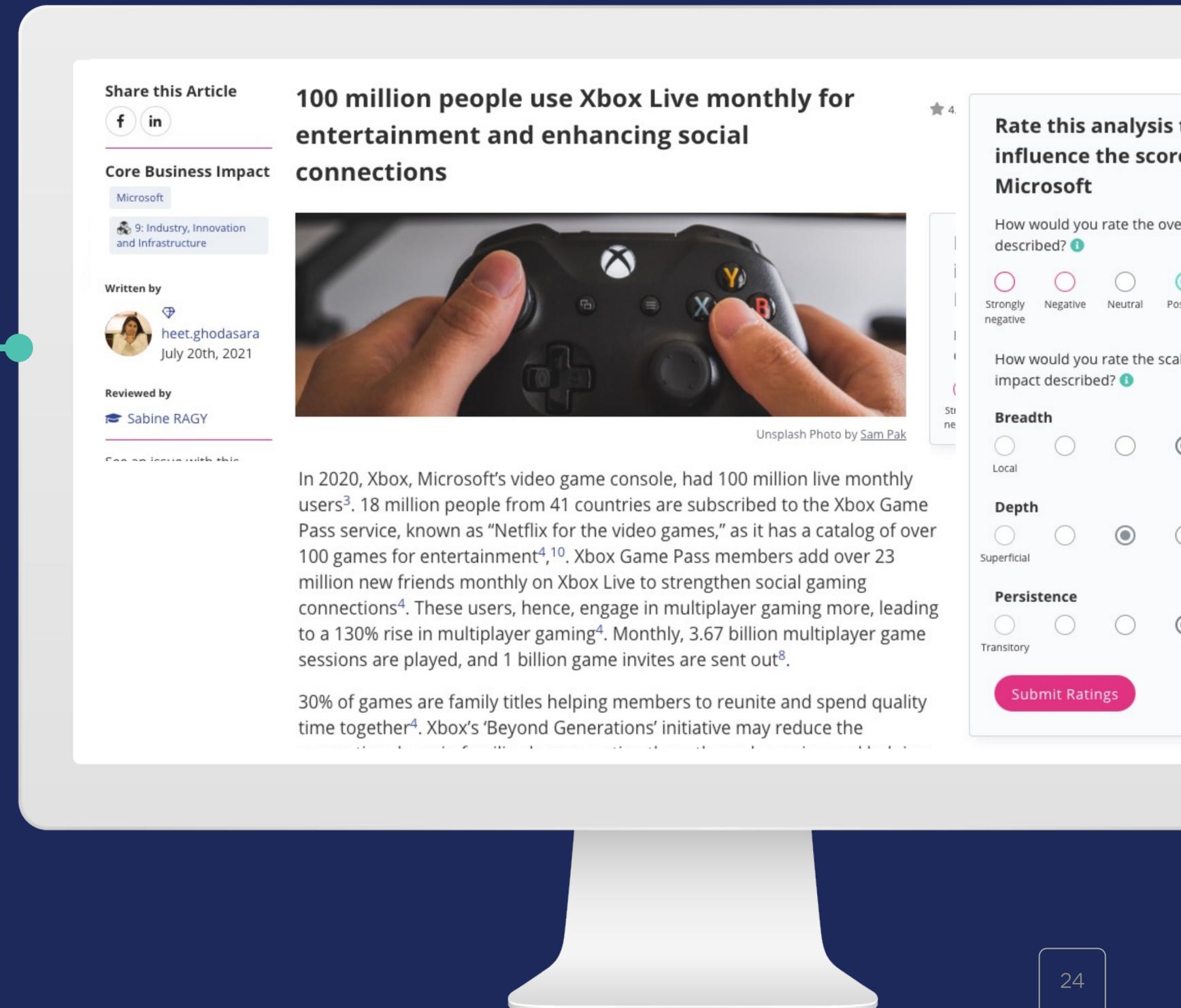
An independent team of Certified Reviewers reads, fact-checks and challenges the Analyses and sources. If it does not comply with our quality requirements, it is rejected or returned to the author for improvements.

Each Analysis (and Analyst) is graded based on the quality of the work produced. Underperformers get removed.

# Rating & scoring process

Better informed raters are given higher weight in the rating system

- ✓ Certified Impact Raters training has already trained over 1500 attendees and 220 completed in full.
- ✓ Outliers are detected and their votes are frozen.
- ✓ Platform can detect rushed or robot-like rating (not enough time on page etc).



# Getting to know us

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Two founders with over 50 years of relevant business experience in asset management, impact investing, sustainable investing and financial analysis.



- Head of SRI and Impact Investing at BNP Paribas Wealth Management
- Head of Impact Investing and SRI at Lombard Odier
- Program Director at Graduate Institute on SDG Investing
- Ex-Chairman of Sustainable Finance Geneva

**A leader in sustainable investing and impact investing since 2006**

## Bertrand Gacon

CEO



- Head of Global Consumer Group at Morgan Stanley (Equity Research)
- Co-head of Consumer Staples Group at Morgan Stanley Europe (Investment Banking)
- Head of Private Banking Investments Services (equity research, impact investing, fund management...) at Lombard Odier

**30 years as a leading equity analyst and private banker**

## Sylvain Massot

CFO

Decision to launch Impaakt in 2019 to reinvent the way we look at the role of business and transition towards an impact-driven economy.

# Getting to know us

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Eugenia  
COO



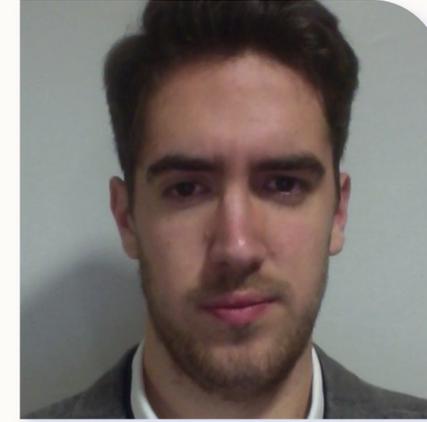
Faye  
Marketing



Victoria  
Community



Bruno  
Development



Diego  
Data Science



Sabine  
Content



Adriano  
Content



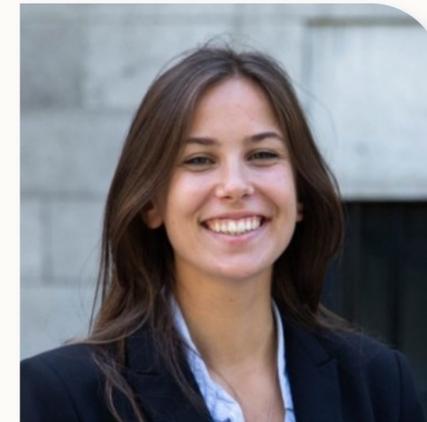
Vianney  
Product



Sarah  
Content



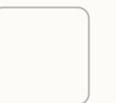
Cedric  
Project  
Management

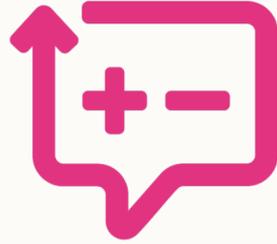


Melissa  
Client  
Relations



Nadine  
Office &  
Invoicing



impaakt 

## Beyond ESG

[impaakt.com](https://impaakt.com)