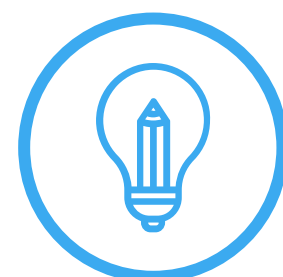


Impact Data & Reporting Services

Presentation for

 **MIRABAUD**

Who is Impaakt?

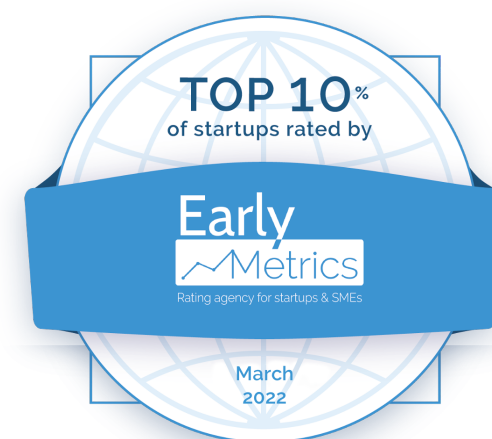


Our goal

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



EDMOND
DE ROTHSCCHILD



REYL
INTESA SANPAOLO

DE PURY PICTET TURRETTINI

DECALIA

 UNIGESTION



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

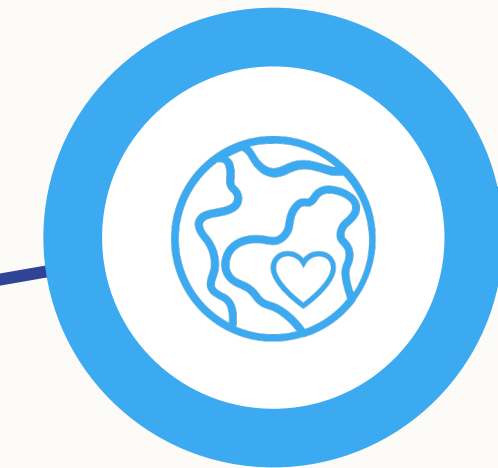
Expectation from Business:
Making money in a responsible way.

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

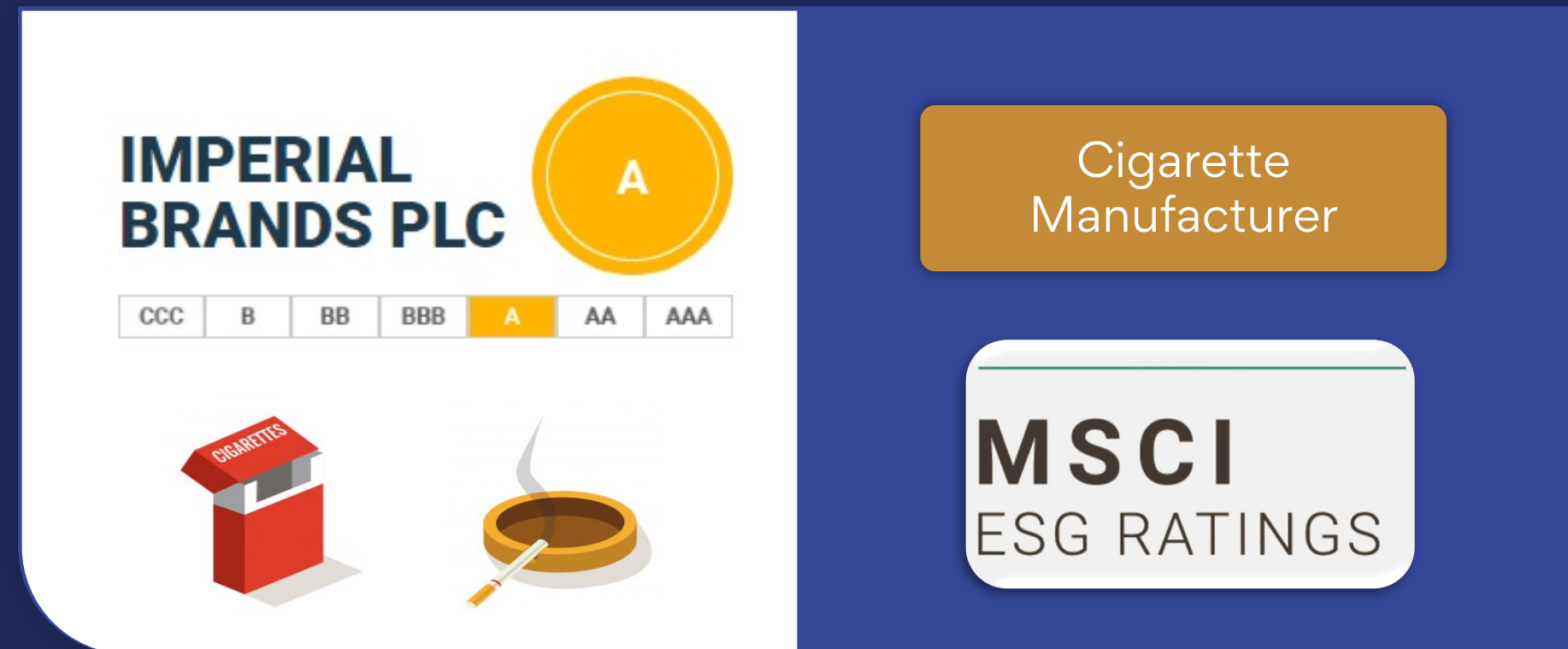
Expectation from Business:
Making money and contributes to common good.

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



Vs.



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?

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.



Good enough reasons...



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.



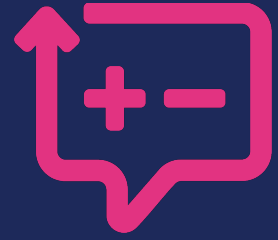
Need for differentiation

Show you are a leader by becoming impact certified.



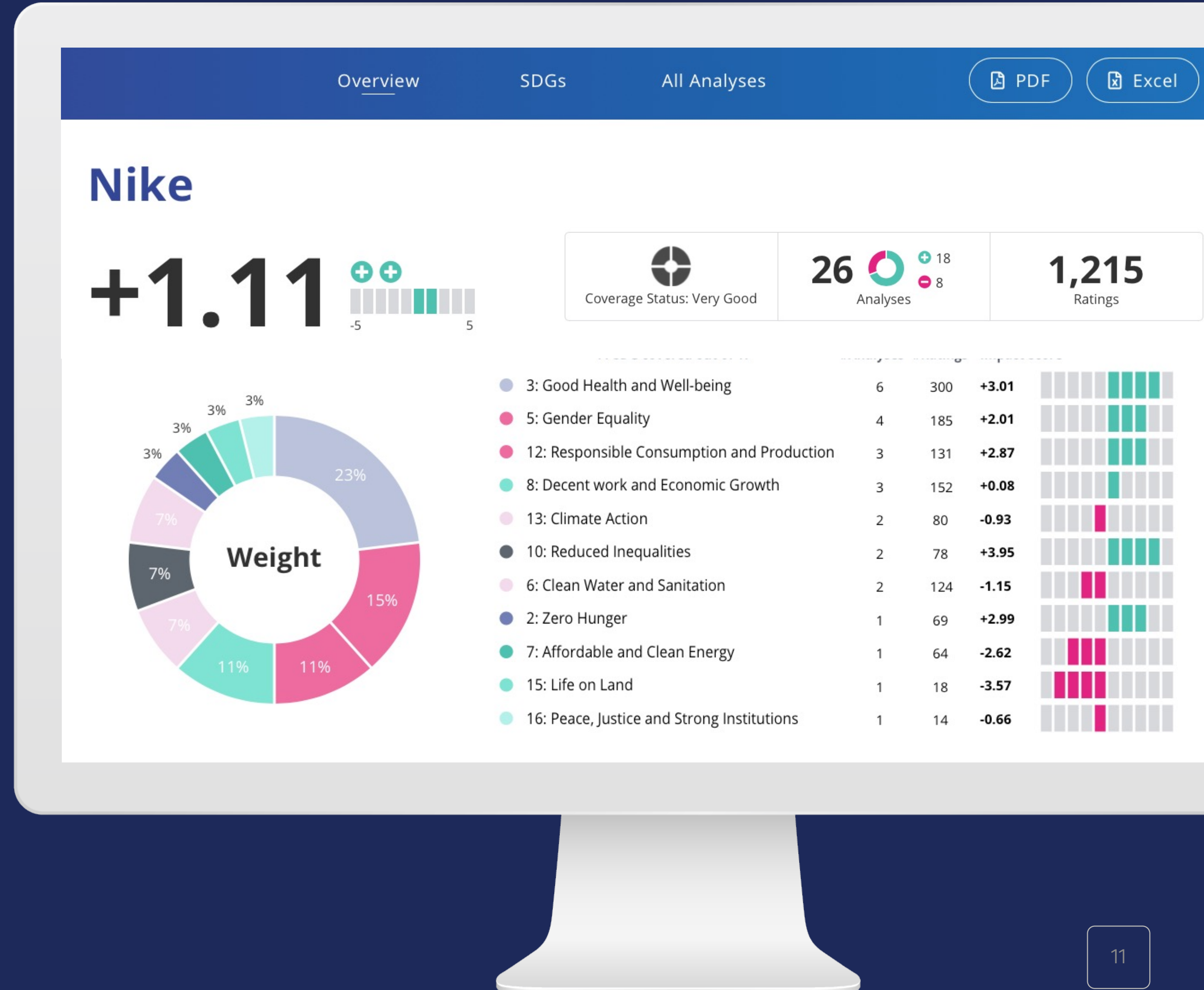
Portfolio performance

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^{*}, not annually
- Our forecasting module^{*} uses collective intelligence to estimate future trends.

^{*}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

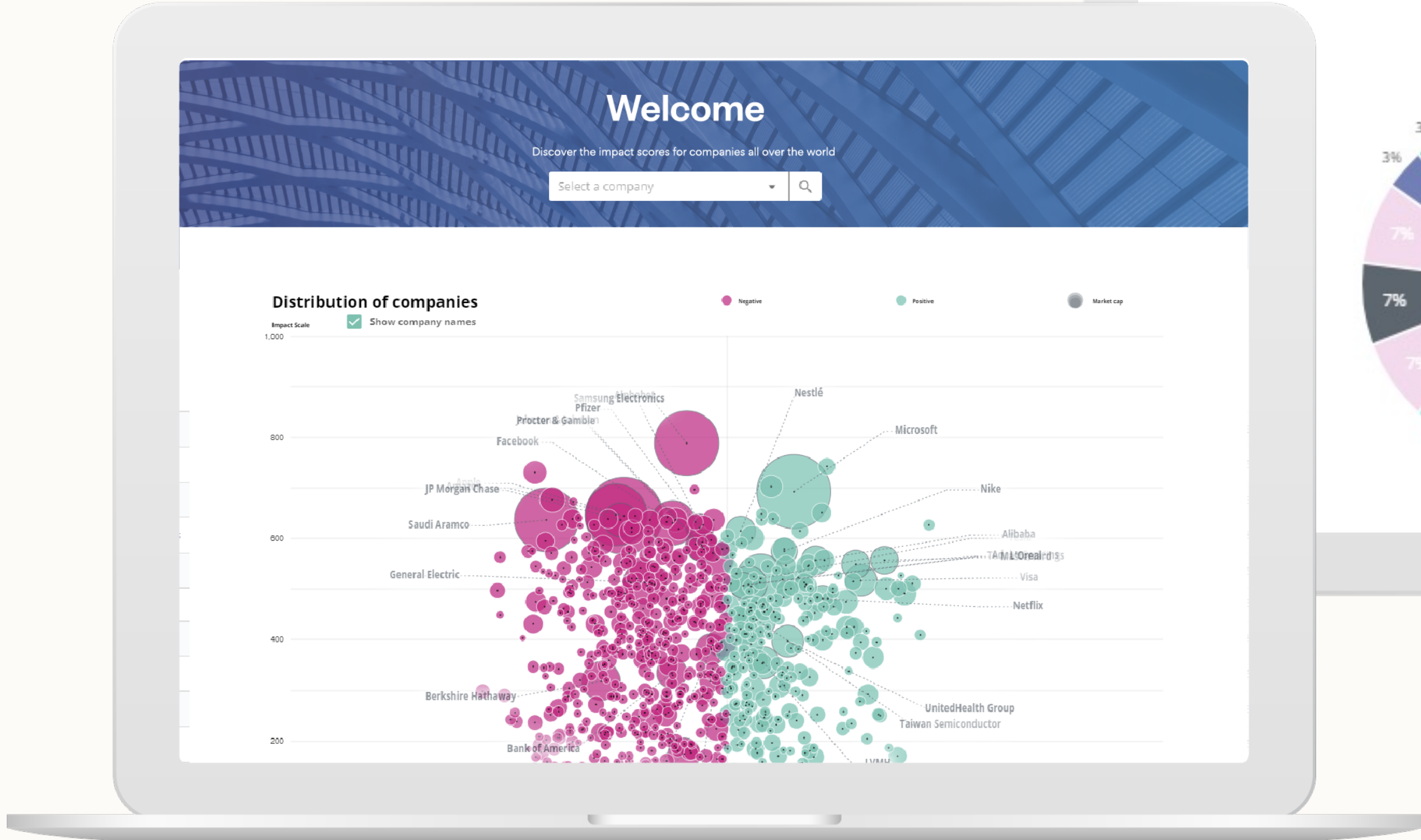
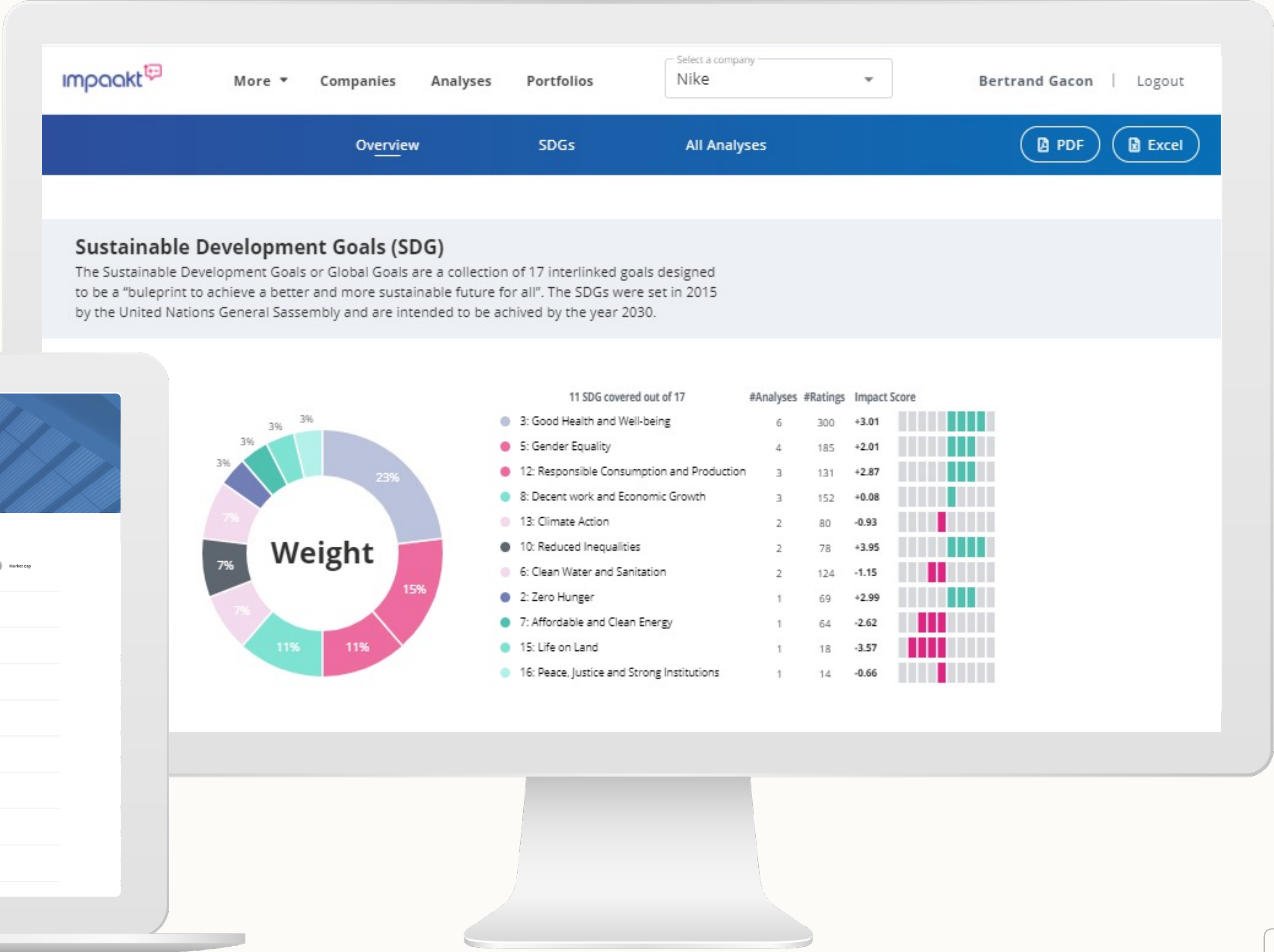
Swiss innovation agency laureate
≈CHF 1 million R&D program in partnership
with Swiss leading universities



Figures as of 20/03/2022

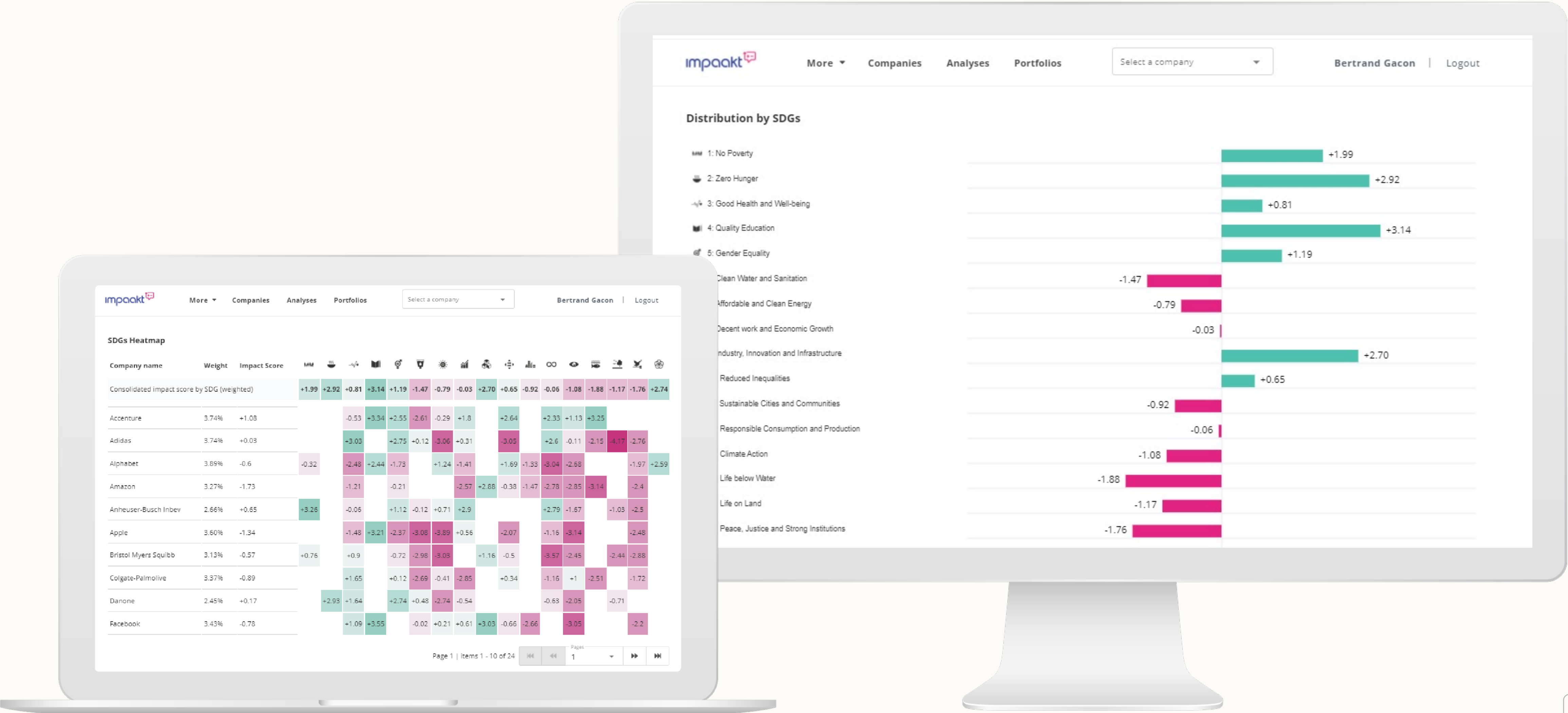


A powerful client interface





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

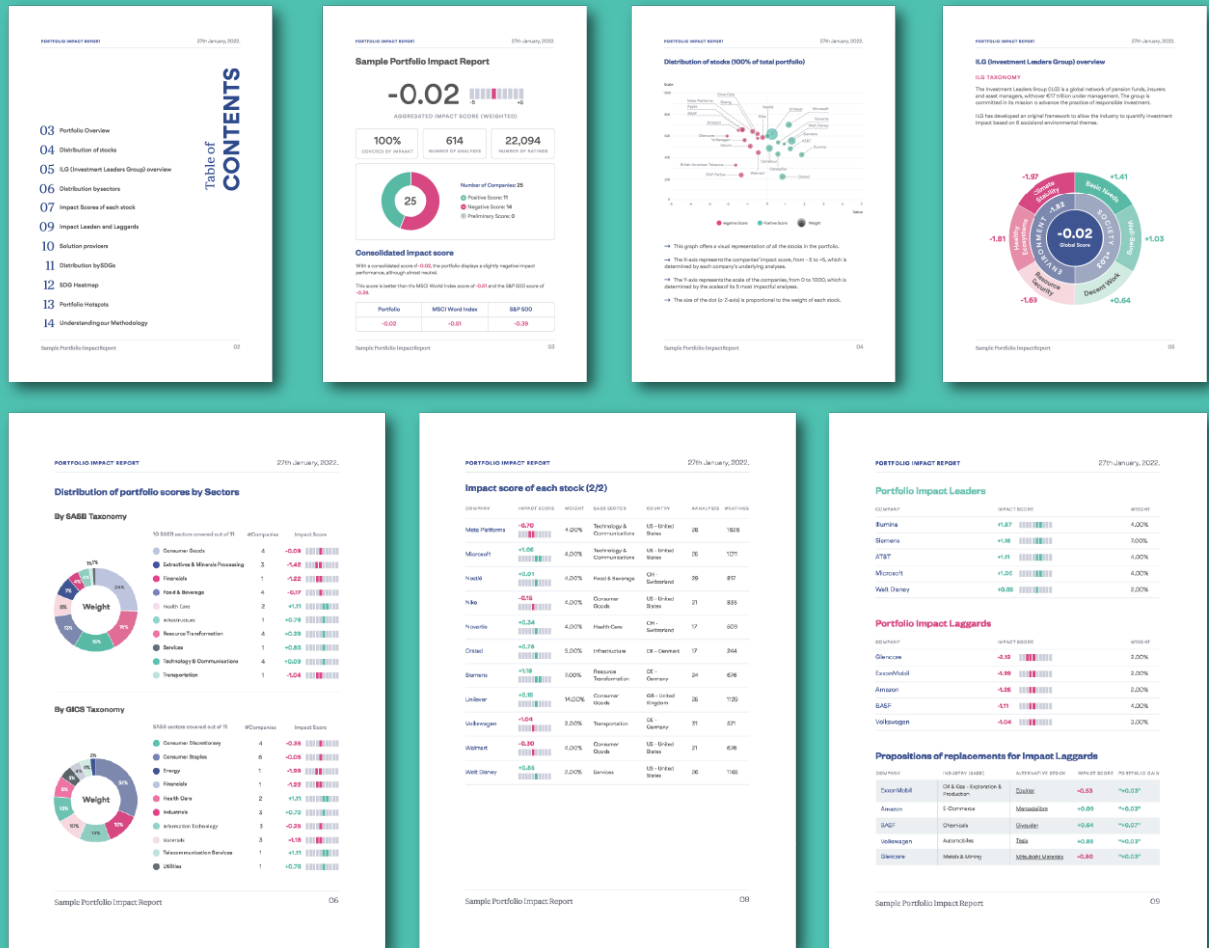
Idea origination
Thematic impact funds

Asset Owners



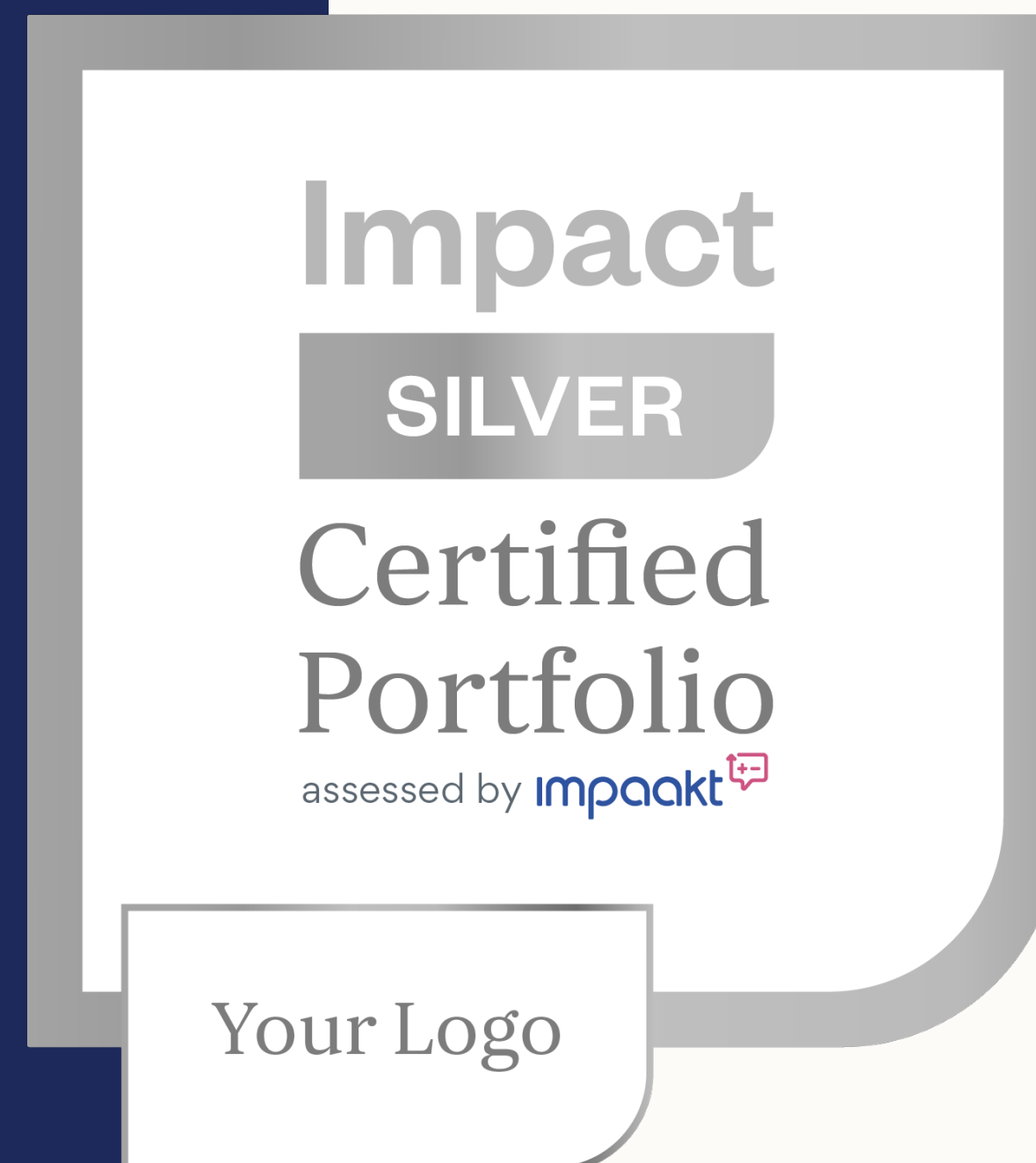
Portfolio diagnostic and reporting

- 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.



Program Content

Key concepts and methodology.

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

Tools and best practices.
Exercises and assignments.

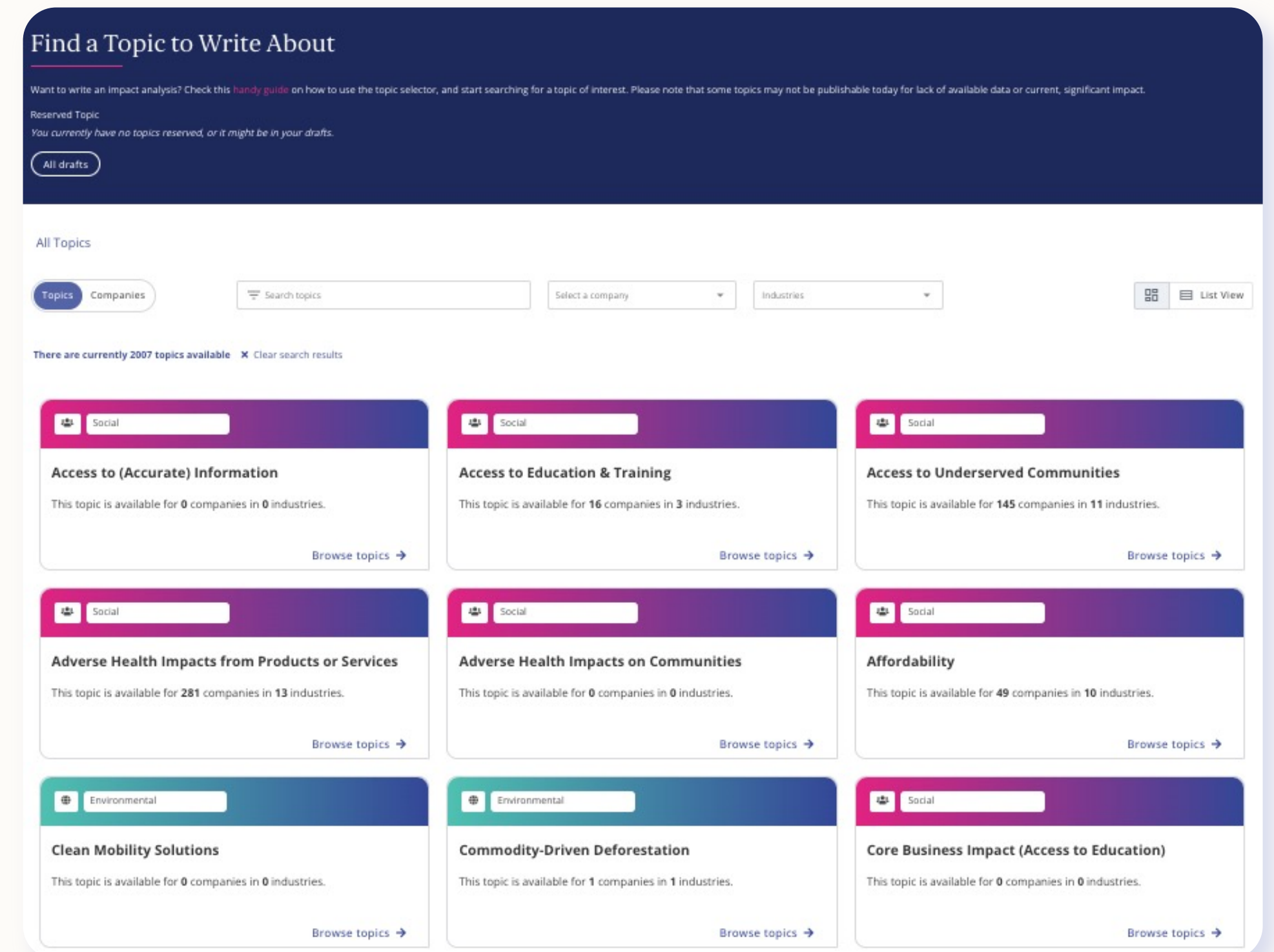


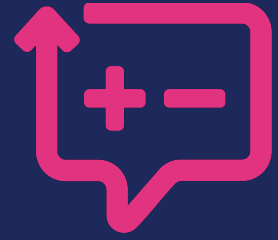
Artificial Intelligence powered research process.

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.





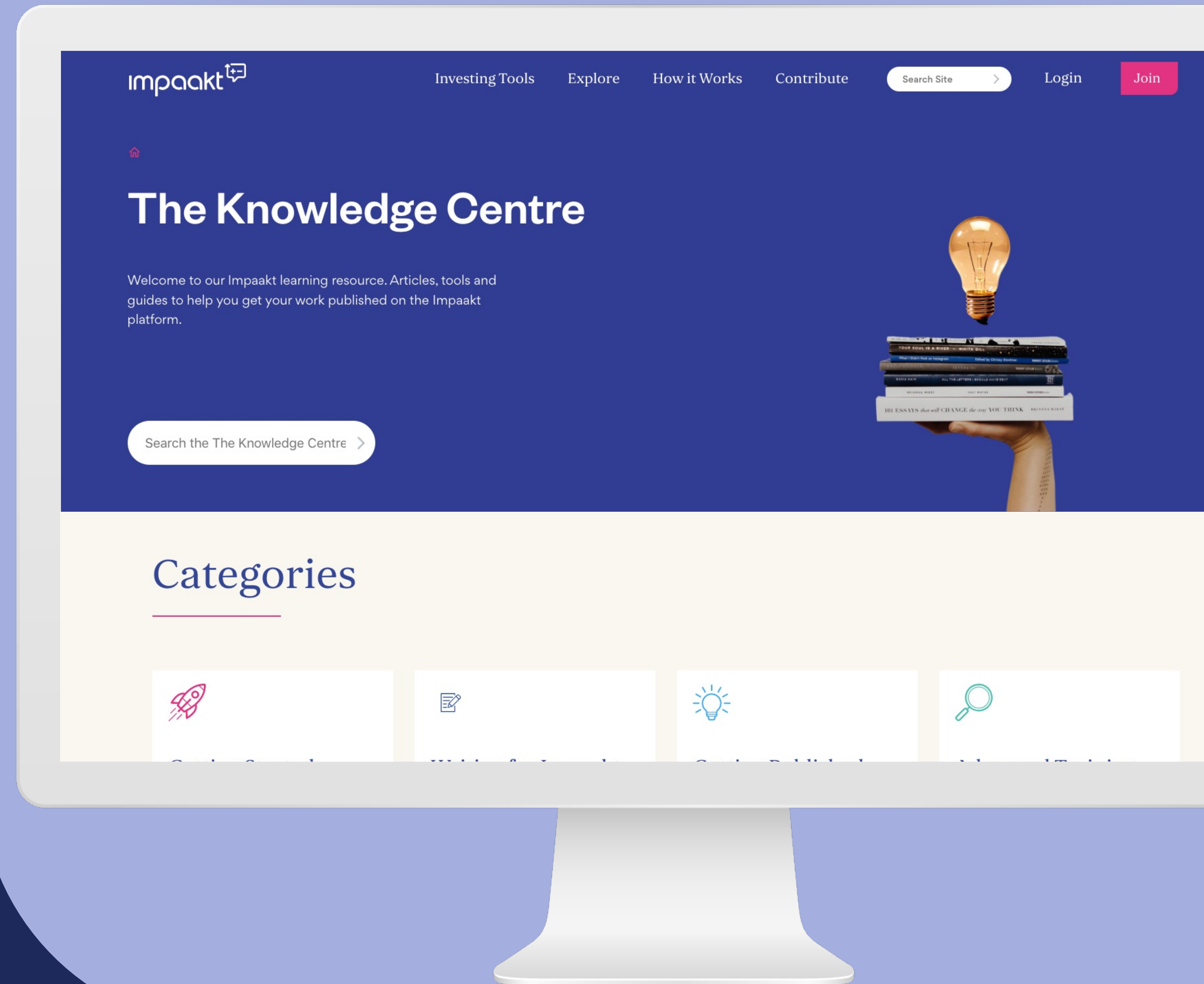
Active collaborative learning.

Continuous Improvement of our community's skills.

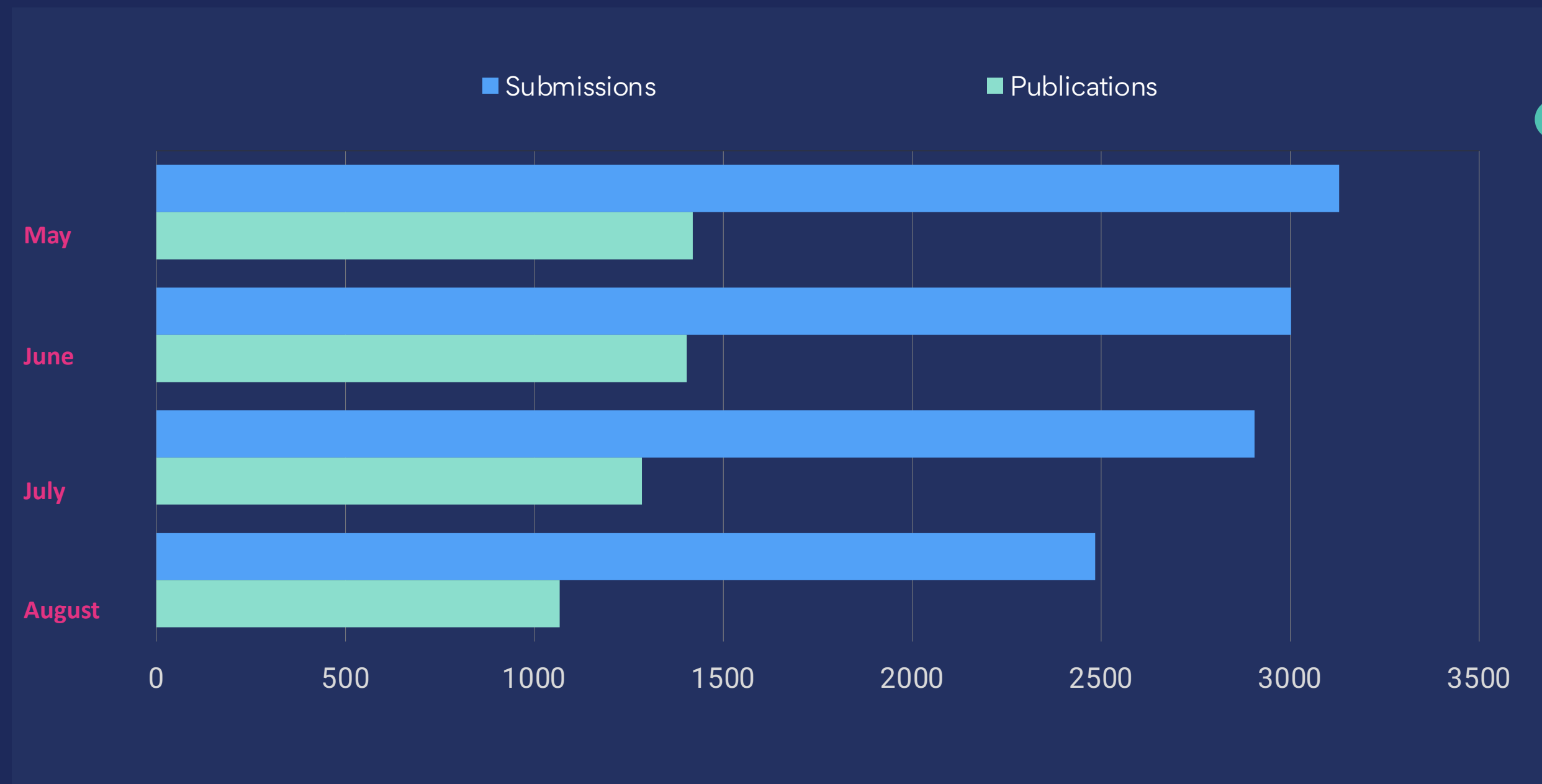
A collaborative tool including a knowledge center, resources guidelines and tutorials available to all our Certified Impact Analysts

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.

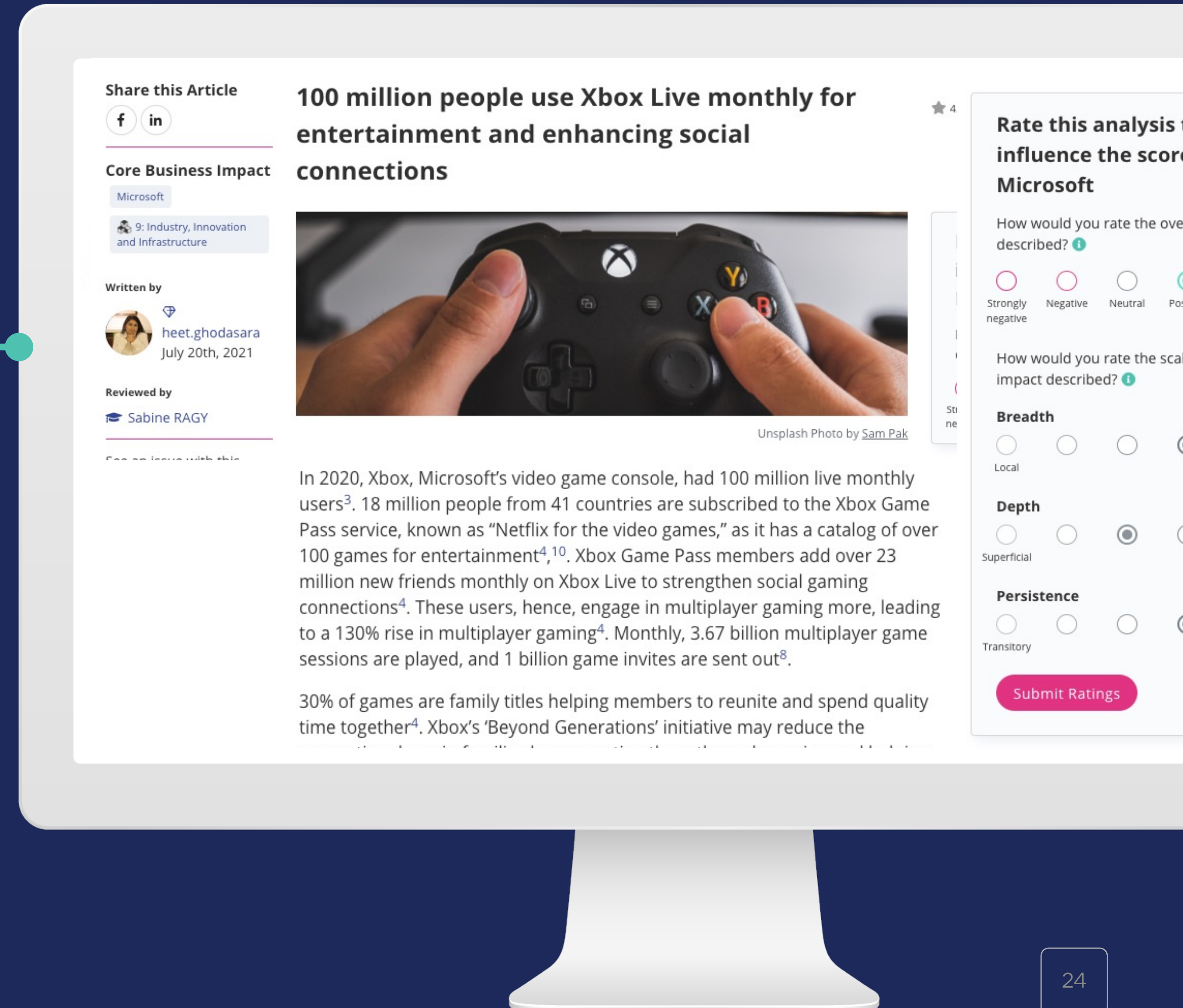
An independent team of Certified Reviewers reads, fact-checks and challenges the Analyses and sources. If it does not comply with our quality requirements, it is rejected or returned to the author for improvements.

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**

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

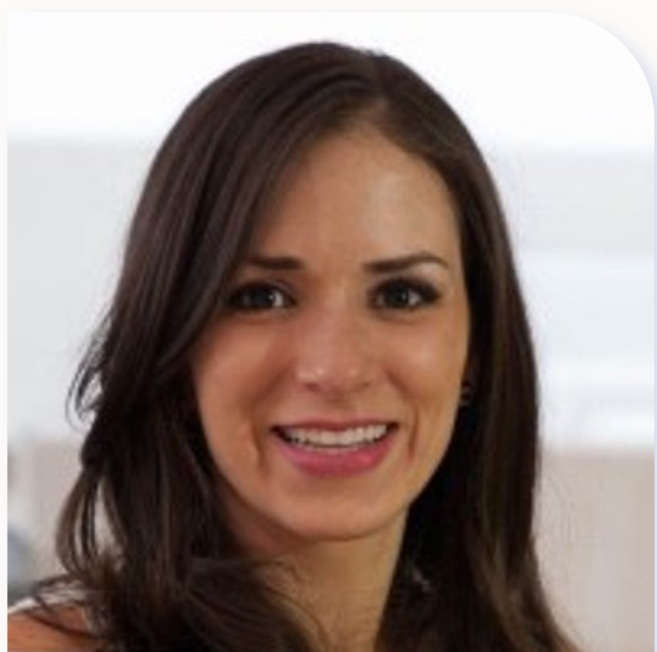
30 years as a leading equity analyst and private banker

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**



Eugenia
COO



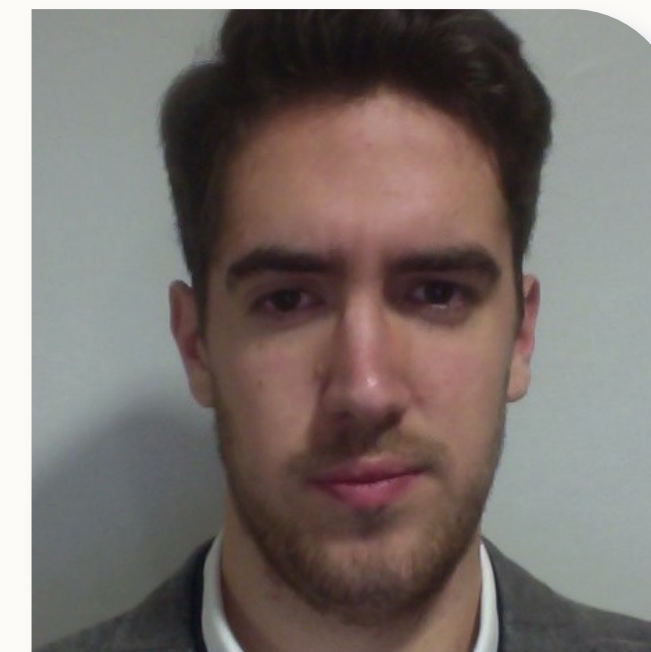
Faye
Marketing



Victoria
Community



Bruno
Development



Diego
Data Science



Sabine
Content



Adriano
Content



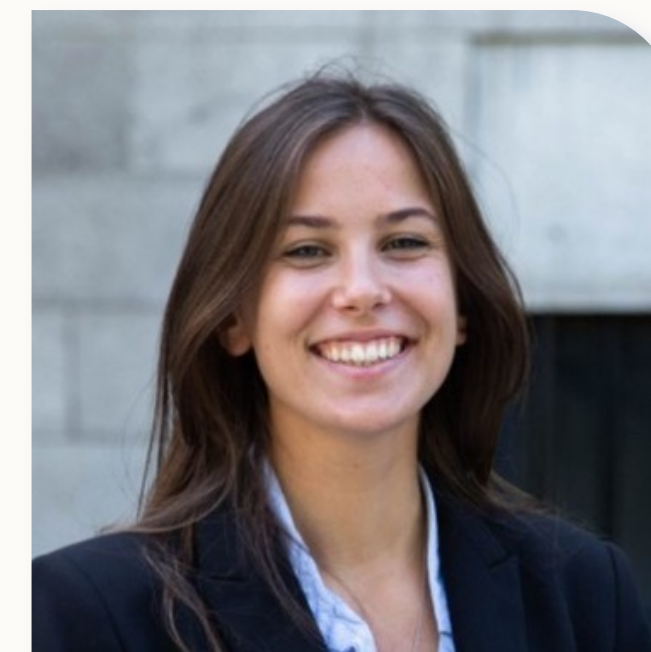
Vianney
Product



Sarah
Content



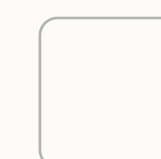
Cedric
Project
Management



Melissa
Client
Relations



Nadine
Office &
Invoicing





Beyond ESG

impaakt.com