yourSRI ESG Funds & Portfolio Screening

yourSRI ESG Funds & Portfolio Screening is a next generation transparency tool that provides multi-dimensional risk assessments at the portfolio level to effectively measure environmental, social and governance (ESG) exposure relative to peers and benchmarks - for better decisions.

Key Features and Benefits

Comprehensive portfolio ESG risk assessment
yourSRI Funds & Portfolio Screening is a unique solution to assess and benchmark the ESG characteristics of investments and to reveal hidden ESG-related risks. Smart and simple to use reports providing an objective and standardized framework for understanding portfolio ESG risk and for tracking ESG performance over time.

Assess the effectiveness of your ESG integration activities
yourSRI Screening reports allow you to keep track of improvements or deterioration in ESG performance by comparing your ESG risk characteristics to other portfolios and to benchmarks; this facilitates the successful integration of ESG factors. Easily evaluate how managers address ESG risks and take your manager selection and monitoring process to the next level.

Benchmark ESG performance
yourSRI Screening reports benchmark the ESG portfolio characteristics against ESG and conventional indexes to identify portfolios with ESG risk scores that stand out in comparison to these benchmarks.

Analyse ESG metrics at every level
The yourSRI Screening reports provide clients with a holistic overview of the ESG profile of a portfolio, measuring key ESG statistics at the portfolio, sector, company level.

Meet ESG reporting requirements
The comprehensive yourSRI Screening reports present data in a clear and consistent format that can be used in supporting ESG reporting requirements, internally and externally, including those of the Principles for Responsible Investment (PRI).

Business involvement and controversy exposure assessment
The reports help to identify companies involved in significant controversies that may result in reputational risks as well as to identify the involvement in a range of products and business activities that might be subject to restrictions.

Identify the social and environmental impact
The reports assess exposure to social and environmental impact themes and measures the impact of your investments.
Product Overview

yourSRI „ESG Funds & Portfolio Screening“ provides transparency to better understand, measure and manage the ESG characteristics of funds and portfolios, providing in-depth analysis of ESG Risks, Values and Impact Factors.

Key Features and Benefits

Quick Facts Summary Report
- Overall ESG-Score
- Global Percentile & Peer Percentile Ranks
- United Global Compact Compliance
- Business Involvement Exposure

ESG-Risks Assessment & Benchmark-comparison
- Overall and E-, S- & G-Pillar scores
- Sector specific assessments
- Portfolio ratings distribution
- ESG-Trends
- ESG-Leaders & -Laggards
- Lowest & Highest rated portfolio positions
- Ratings of the largest positions in the portfolio

Controversy Exposure & Business Involvement
- Identify severe Environmental, Customer, Human & Labour Rights, Supply Chain and Governance Controversies
- Identify companies’ involvement in a range of business activities like Adult Entertainment, Alcohol, Gambling, Genetic Engineering, Tobacco, Weapons, Nuclear Power, etc.

Social & Environmental Impact Assessment
- Identify positions in your portfolio that offer revenue exposure to social and environmental impact solutions.