



Real-time AI-Powered ESG Alert Dashboard

Climate & ESG Solutions

# Navigate a Changing Climate

## With Ortec Finance's Climate & ESG Solutions

**ESG RADAR is an AI-driven, time, and cost-saving dashboard for investment professionals.**

Our real-time ESG related news feed allows you to delve further into the companies you invest in and enables you to:

- Manage your investment portfolio's reputational risk
- Strengthen engagement activities
- Identify ESG investment opportunities

ESG Radar alerts  
you to material ESG  
breaking news



# Key Strengths

## Real-Time AI-Powered ESG Alerts Dashboard Customizable to Your Preferences



### News Analytics:

Analyze real-time trending news topics with AI & text analytics.



### Sentiment Analysis:

Filter with sophisticated sentiment algorithms showing positive & negative news.



### Alerts:

Receive your alerts when risk signals arise on companies, trends or in markets.



### Accuracy:

Identify specific companies you wish to follow through dedicated attributes.



### Global Sources:

Scan through >200 million global news sources to extract only actionable insights.

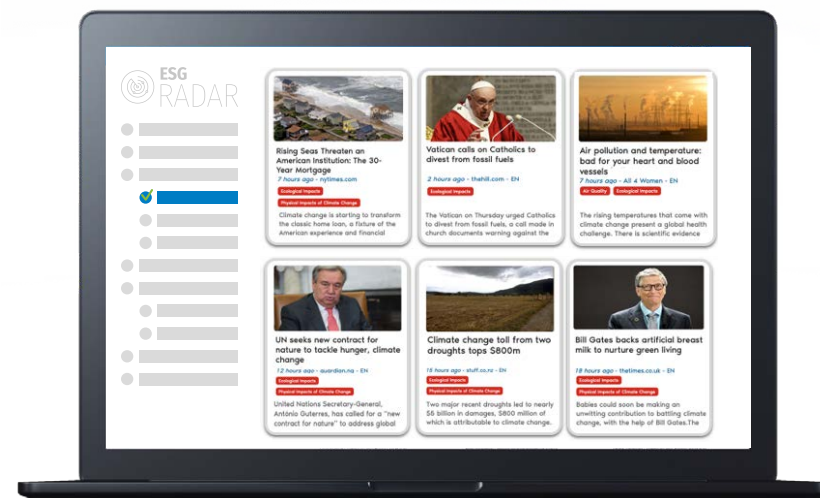


### Corporate Linkage:

Corporate tree structure of head offices and subsidiaries (including SMES) are indicated.

ESG Radar gathers ESG-related global news from 200 million financial and social media sources. The dashboard also contextualizes the information with sources that go back to the year 1704. These news articles are translated from over 100 languages into English, selected in alignment with the Sustainable Accounting Standards Board (SASB) Materiality Map®, the world's leading ESG classification system.

The ESG Radar provides insights into historical and current ESG news as well as financial sentiment on companies, sectors, markets and society.



# AI Technology

## Real-Time AI-Powered ESG Alerts Dashboard Customizable to Your Preferences

Use the power of **artificial intelligence** to monitor material ESG topics in your portfolio via historical and **real-time news** articles, delivered to your fingertips.

**ESG RADAR is based on state-of-the-art big data and AI technology powered by an algorithm tracking individual companies. Even small and unlisted companies are monitored.**

News websites are checked based on the frequency of newly published items, at least every 4 hours. News can be searched by ESG category, industry and company:

- The ESG categories are defined using SASB's Materiality Standards.
- Industry classification according to the US Standard Industrial Classification (SIC).
- Selecting an unlimited number of companies (listed and unlisted) that you would like to monitor across your portfolio(s).
- Sophisticated logic and machine-learning technology are used to extract the main topic from a news article and applied to the most relevant category.
- Machine-learning techniques enables ESG Radar to learn over time, ensuring its quality.
- ESG Radar is built to scale to an unlimited amount of news sources, users and languages. There are no limitations in terms of data or system resources.



# How does it work?

## SASB Materiality Map

ESG risk categories can easily be selected using SASB's Materiality Map®.

There is an overwhelming amount of environmental, social, governance (ESG) and sustainability information disclosed publicly, but it can be difficult to identify and assess which information is most useful for making **financially related decisions**. Therefore the ESG Radar works with the Sustainable Accounting Standards Board (SASB) ESG categorization. SASB has identified financially material issues— those that are reasonably likely to influence the financial conditions or operational performance of a company.

SASB has identified five broad sustainability dimensions: Environment, Social Capital, Human Capital, Business Model & Innovation, and Leadership & Governance. Within these five dimensions, 26 issues have been identified which encompass a range of disclosure topics and associated accounting metrics.



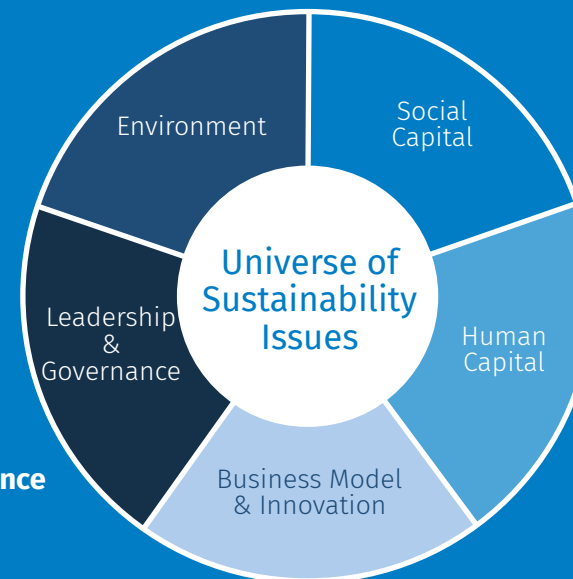
## SASB's Universe of 26 Sustainability Issues

### Environment

- Greenhouse Gas Emissions
- Air Quality
- Energy Management
- Water and Wastewater Management
- Water and Hazardous Material Management
- Ecological Impacts

### Leadership & Governance

- Business Ethics
- Competitive Behavior
- Managing the Legal & Regulatory Environment
- Critical Incident Risk Management
- Systemic Risk Management



### Business Model & Innovation

- Human Rights & Community Relations
- Customer Privacy
- Data Security
- Access & Affordability
- Product Quality & Safety
- Customer Welfare
- Selling Practices & Product Labeling

### Social Capital

- Product Design & Lifecycle Management
- Business Model Resilience
- Supply Chain Management
- Materials Sourcing & Efficiency
- Physical Impacts of Climate Change

### Human Capital

- Labor Practices
- Employee Health & Safety
- Employee Engagement, Diversity & Inclusion

source: SASB



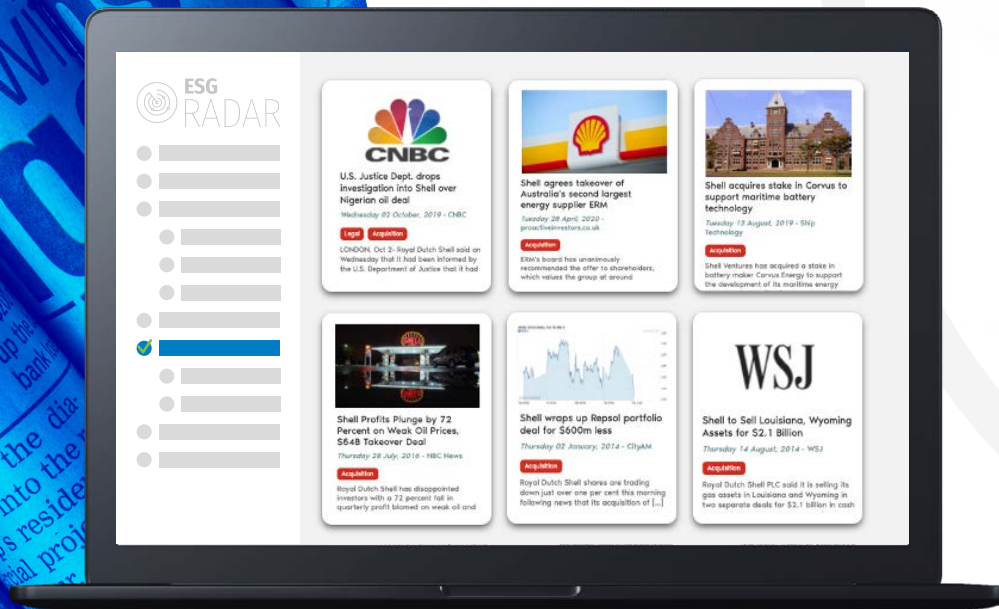
# ESG Radar and Climate Change

An integrated approach

**Although climate change is a material issue on the macro, micro and business level for investment professionals, it is not a separate topic in the SASB Materiality Map®. Here's why:**

Climate change risks and opportunities relate to almost all 26 sustainability topics SASB has identified as financially material. Climate-related risks are systemic and therefore unhedgeable. Climate change risks go beyond GHG emissions, air quality, and energy management.

Depending on your portfolio and investment strategy, you can make almost endless combinations to stay abreast on a variety of climate issues that are in the news every day: physical risks, transition risks, and transition opportunities. You will be able to follow not only how sectors and companies impact climate change but also how they are impacted by climate change.



# How does it work?

## Industry classification according to the US SIC

### SIC

Industry classifications according to the US SIC 4 standard, 92 industry classifications can be chosen individually or selectively.

- ☐ Agriculture, Forestry, Fishing
- ☐ Mining
  - ☐ Air Quality
  - ☐ Metal Mining
  - ☐ Coal Mining
  - ☒ Oil and Gas Mining
  - ☐ Mining and Quarrying of Nonmetallic Minerals, Except Fuels
- ☐ Construction
- ☐ Manufacturing
- ☐ Wholesale
- ☐ Retail
- ☐ Finance, Insurance, Real Estate
- ☐ Services
- ☐ Public Administration
- ☐ Transportation, Communication, Electric, Gas, Sanitary Services

#### ESG RADAR Features:

- ✓ **Overview Dashboard** - Provides an aggregated summary of the types of insights contained in the ESG Radar
- ✓ **Portfolio Dashboard** - Enables grouping of companies that you can use for filters or use to create customized alerts
- ✓ **Company Dashboard** - Provides search functionality for all companies you are tracking; filter by industry, country, portfolio
- ✓ **Articles Dashboard** - Read all published articles, using advanced filters or different views
- ✓ **Settings** - View head office & subsidiaries of all companies in your portfolio; alerts (PC & mobile); language source selection; date range for searches, etc.
- ✓ **Advanced Search Queries** - Sentiment selection (negative & positive news)
- ✓ **Analytics** - Global Risk Heatmap | Word Cloud | Industry Matrix (Industry vs. ESG categories) | Company Matrix (Company vs. ESG categories)

# The Compass

## Climate & ESG Solutions



Ortec Finance has developed five tools to support you as an investor to navigate climate change.

These tools offer economic and financial insights into your investments' vulnerabilities and opportunities - and how to act on them. Insights are **quantified** and expressed in **financial metrics** for easy integration into your investment decision-making & reporting frameworks. Our tools can be integrated into **software**, implemented separately, or utilized in various combinations depending on your **specific needs**.



CLIMATE  
MAPS

*Maps out your portfolio's exposure to systemic, economic and financial climate risks.*

*In partnership with Cambridge Econometrics*



CLIMATE  
SIGNS

*Signposts the world's actual climate trajectory.*



CLIMATE  
ALIGN

*Monitors portfolio alignment with net-zero GHG emissions by 2050.*



CLIMATE  
PREDICT

*Assesses your real assets' exposure to future extreme weather events.*







ESG  
RADAR

*Alerts you to material ESG breaking news.*



# Do you have other challenges?

Other solutions provided by Ortec Finance

|   | Insurance Companies | Pension Funds | Sovereign Wealth Funds | Wealth Management / Banks | Asset Manager |
|---|---------------------|---------------|------------------------|---------------------------|---------------|
|  <b>GLASS for Pensions and Insurance</b><br>Asset and liability scenario solution that improves financial decision making and risk management by simulating the short and long-term solvency position. | ✓                   | ✓             | ✓                      |                           | ✓             |
|  <b>PEARL</b><br>The acclaimed performance measurement & attribution solution.   | ✓                   | ✓             | ✓                      |                           | ✓             |
|  <b>OPAL</b><br>Goal-based financial planning and monitoring solution.  | ✓                   | ✓             |                        | ✓                         | ✓             |
|  <b>Real world economic scenarios</b><br>Ortec Finance Scenarioset (OFS) generated by the Dynamic Scenario Generator (DSG). Ortec Finance also offers Risk Neutral scenarios                         | ✓                   | ✓             | ✓                      | ✓                         | ✓             |

# Contact Us

Speak to one of our experts



**Ortec Finance is a leading provider of technology and solutions for risk and return management.**

It is our purpose to enable people to manage the complexity of investment decisions. We do this through delivering leading technologies and solutions for investment decision making to financial institutions around the world. Our strength lies in an effective combination of advanced models, innovative technology and in-depth market knowledge. This combination of skills and expertise supports investment professionals in achieving a better risk-return tradeoff and thus better results.

**Headquartered in Rotterdam, Ortec Finance has offices in:**  
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**500+** customers



**96%** retention rate



**3 trillion euro** total assets  
managed by our clients

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