

Build your firm's profile ...

... in sustainable investment globally

... through high-quality research and thought-leadership

“Why?”

Trends in sustainable investment

- Sustainable investment will keep growing
 - ... driven by client demand, corporate positioning and regulation
- Yesterday's debate will continue
 - (Over the quality/relevance of ESG data, practice of disconnected engagement etc).
- ... but tomorrow's winners will be:
 - Either 'greenwashers'
 - Or 'game-changers'

Which is your firm? A 'greenwasher' or a game-changer'?

Greenwasher or game-changer?

- **‘Greenwashers’** are firms that reduce sustainable investment to the lowest common denominators of:
 - Data-based screening
 - Corporate governance-style engagement (i.e. post-trade and disconnected to investment decision-making) and
 - Glossy reports with portfolio-level analytics and cherry-picked case studies
- **‘Game-changers’** are firms that demonstrate:
 - **Quality through research** ... leading to investment decision-making
 - **Impact on company practice** ... delivering ‘real world’ change
 - **Genuine integration** ... with investment decision-making
 - **Efficiency** ... because ... have you seen the state of the global economy right now?!
 - **Visibility** ... because you won’t sell funds to or influence anyone if the market can’t see you

SRI-Connect wants (and is funded) to support the ‘game-changers’

“How?”

SRI-Connect...

www.sri-connect.com

... is philanthropically-funded*...

... to support the **research and profile** in sustainable investment...

... of 100** asset managers and 25** research providers globally

* Thanks to the Gordon and Betty Moore Foundation's Conservation and Markets Initiative

** Make sure that your firm is on our list for support

The screenshot displays the SRI-Connect website. At the top, the logo 'SRI CONNECT' is accompanied by the tagline 'Where sustainable companies meet responsible investors'. A navigation bar includes links for MARKET BUZZ, DIRECTORY, MARKET, NETWORK, ON SRI, and ABOUT. The 'Market Buzz' section is active, featuring a user profile for Mike Tyrrell with a 'LOGOUT' button and a notification for 13 new private messages. Below the profile are buttons for 'SUBSCRIBE NOW', 'CONTACT US', and 'RECOMMEND US'. A 'THANKS FOR SUBSCRIBING' section follows, listing 'SRI LOGO' and 'Carole Ferguson Industry Tracker'. The main content area, titled 'The latest Buzz', shows a search bar and a list of recent posts from the SRI-CONNECT Editor, including topics on climate advisers, industrial decarbonization, and the WRI report. A sidebar on the right contains a 'MARKET BUZZ' menu, a 'SPONSORED LINK' for SRI-CONNECT's services, a 'NOTICES' section for a sustainable investor access product launch, and a 'WHO'S ONLINE' section.

SRI-Connect supports:

Quality through research:

- The only open-market platform in the world fully-focused on sustainable investment research

Impact on company practice:

- 915 companies use SRI-Connect to understand and communicate with investors
- Do you want them to communicate with you?

Genuine integration

- Our primary focus is highlighting research that informs and influences investment decision-making

Efficiency:

- The site's content is directly tailored to match the coverage and interests of each individual user

Visibility & transparency:

- Because your activity in the market is seen by the market (and [we can prove it with data!](#))

Tomorrow's winners demonstrate

Support from SRI-Connect

Winners demonstrate: Visibility & transparency

- SRI-C support: **Profile** in the industry

Winners demonstrate: Quality through research

- SRI-C support: **Research** supply

Winners demonstrate: Impact on company practice

- SRI-C support: **Access** to companies

Winners demonstrate: Genuine integration

- SRI-C support: **Training** for financial analysts and ESG analysts

Winners demonstrate: Efficiency

- SRI-C support: **Other:** Everything we do is focused on the needs of individual analysts

Get started ...

Email mike.tyrrell@sri-connect.com

Step 1: No cost: Contact us today to learn about the focused support we can provide to your firm.

Step 2: No cost: We will send you:

- An Industry Profile Report
 - Shows how visible your firm currently is in the industry (including benchmark vs peers)
- A Coverage Report
 - Shows how your team's priorities and interests are featured
- A request for a short Zoom meeting to discuss your ambitions and needs in more detail

Step 3: No cost: We will start to help you with:

- Industry profile
- Research access
- Access to companies
- Training
- Other ...

Profile ... Research ... Access ...

Training ... Other

We promise ... we deliver

Profile

What we promise ...

- To **build the profile** of sustainable investment market participants in the industry globally
 - ... based on high-quality research, analytical op-ed and their identifiable responsible investment activity

How we deliver...

- Monitor & **post the content** produced by asset managers, research providers and others
 - Post 'investable' research, analytical op-ed and RIAs onto SRI-C's 'Market Buzz'
 - So, it is distributed to SRI-C's 7,000 users
 - Encourage clients to 'buzz' directly
 - Giving them more control and real time visibility on hits achieved
- **Update the 'Organisational profiles'** for their firms on SRI-Connect
 - We can do this for clients or they can do it themselves
- Provide **quarterly quantitative updates on the profile achieved** within the industry
 - Through 'Industry Profile Reports' that show industry rankings and progress

Research (access to): We promise...

What we promise ...

- To facilitate access (for asset managers) to the **best sustainable investment research** whatever its source

We deliver ...

- We scan all providers for the best sustainable investment research
- We focus on **idiosyncratic investable ideas**
 - We assume that asset managers already have access to basic data, ratings and screening services, so...
 - So, we focus on ideas that can be used for fundamental bottom-up investment analysis, engagement and investment decision-making
- We deliver through:
 - **Tailored weekly 'research highlights' email**
 - **Bespoke emails and phone calls**
- **Current focus**
 - On Food, Fibre, Nature & Biodiversity issues
 - Fixed income

Access (to companies)

What we promise ...

- To help asset managers **efficiently arrange high-quality access to companies** with material sustainability exposures

How we deliver ...

- We put the onus on companies to be pro-active
 - ... so they come to investors and research providers rather than expecting you to find them
 - See: www.sustainable-ir.com
- Know the **sector and issue interests** of individual analysts and investors
 - ... so that we can ensure that they receive DIRECTLY invitations to companies that are likely to interest them
 - (... and, by extension, so that their colleagues without such interests) are not targeted

Note:

- We know that asset managers can gain access to companies directly themselves
- But meetings are higher-quality and more efficient when the process is driven by the companies and organised independently

Training

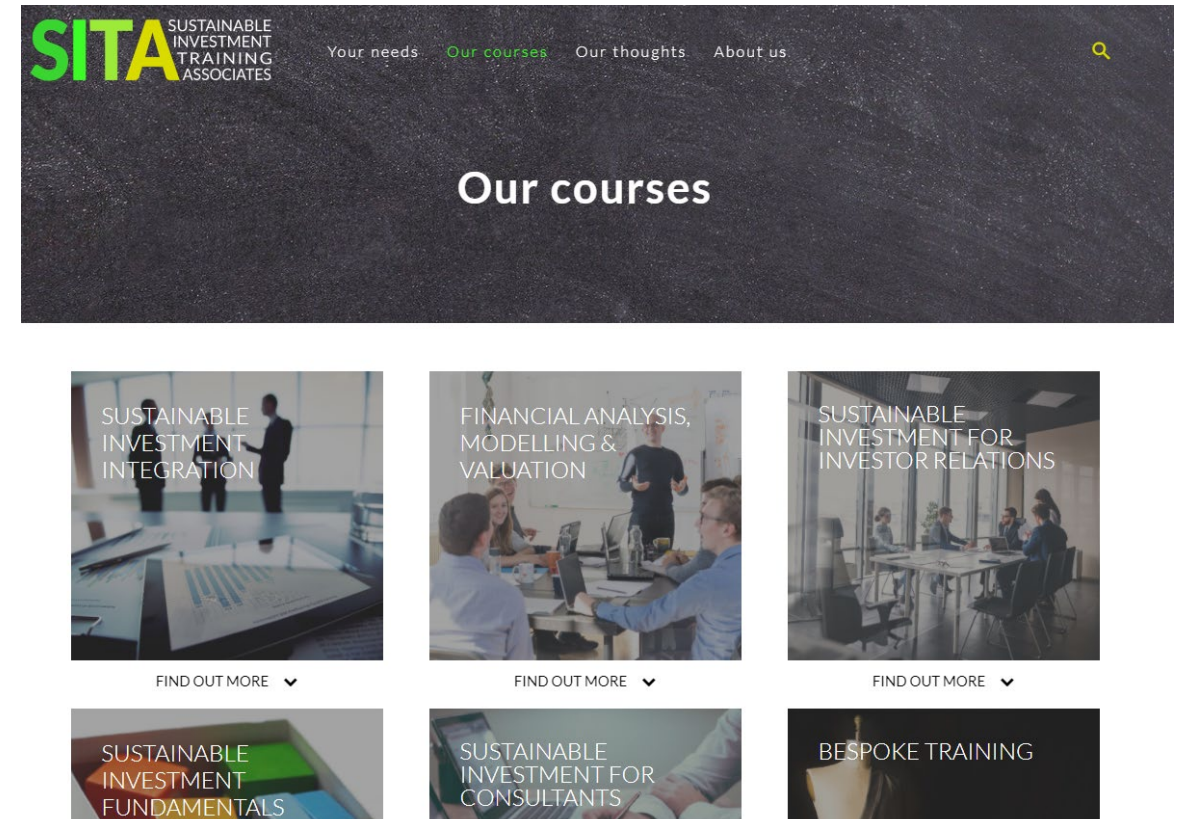
www.sita-training.com

We promise ...

- ... that we will help asset managers and research providers to integrate sustainability factors into fundamental bottom-up valuation

We deliver ...

- **Sustainable Investment Integration**
 - This course equips **'mainstream' financial analysts** with the technical and communications skills and motivations needed to **apply sustainability factors into their valuation and investment processes**.
- **Financial Analysis, Modelling & Valuation**
 - This course equips **sustainable investment / ESG analysts** to understand **fundamental investment analysis** and, thereby, to engage with and influence the 'mainstream' investment debate around sustainability factors.



Other

We promise ...

- ... to work on anything else for asset managers that promotes:
 - **Integration** of individual sustainability factors into investment decision-making
 - High-quality **communications** between companies and investors on sustainability issues
 - Especially where this addresses issues of **Food, Fibre, Nature and Biodiversity**

We deliver ...

- Whatever is important to you in these areas

So ...

... if your firm wants to build its profile ...

... through high-quality analysis and thinking ...

... in the global sustainable investment value chain ...

... contact mike.tyrrell@sri-connect.com

... and we'll add our leverage to your endeavour