

ENGAGEMENT ESSENTIALS REPORT

An SRI-Connect product for listed companies

We describe the ESG / SRI practices of target investors to help you prepare you for contact with them

Product details

We will summarise and highlight the aspects of selected asset managers' approach to sustainable investment in a way that will inform and help you prepare for direct engagement with the analysts or portfolio managers at those firms.

When you might need this

Companies typically use this service:

- Ahead of any pro-active outreach to investors – whether as part of a roadshow or results presentation or in order to identify investors that might be interested in participating in a 'materiality' exercise
- In order to update colleagues on the nature / extent of investors' general interest in sustainability

What we do

- Using SRI-Connect and our wider networks, we update profiles on the nature of investor interest in sustainability, their priorities and the investment strategies and practices that they use to prosecute this interest

How much it costs

- GBP 1,500 + VAT(UK)

What we need from you

- A list of your most significant 25 investors (typically your top 20 together with any particular target investors)

What we deliver

- A report detailing the interests of the investors that are most relevant to your company

Samples

[Engagement Essentials Sample Report](#)