



AMNIE:
ESG
Integration for
Asset
Managers

www.amnie.org
Vancouver, BC



INTEGRATING ESG IN ASSET MANAGEMENT

The business case for integrating Environmental, Social, and Governance (ESG) factors into asset management processes has become more apparent in the last few years. Increasingly, investors demand strong monetary returns aligned with positive social and environmental outcomes. COVID-19 further accelerated the momentum of ESG in evaluating corporate performance and investment returns due to market outperformance of ESG-balanced portfolios. Additionally, a rapidly evolving regulatory landscape, particularly in the European Union, paves the way for industry-wide ESG integration. **ESG has become mainstream.**

Asset managers face increasing pressure to integrate ESG considerations in their investment processes and fund management strategies. Due to the lack of standardization among terms, metrics, reporting frameworks, and regulatory uncertainty, ESG integration can be an initially daunting and complicated task.

With a global network and extensive ESG experience, AMNIE offers a technology-agnostic, agile methodology to help your organization adopt the appropriate integration approach based on your clients, values, and unique operating context.

CONTACT US



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HOW AMNIE CAN HELP

Step 1: ESG Portfolio Strategy Support

- Conduct stakeholder interviews to analyze what investors deem to be the most relevant ESG risks and opportunities
- Benchmark ESG initiatives to other comparable companies
- Conduct a robust evaluation of the material indicators relevant to the Investment Policy Statement (IPS)
- Develop a stakeholder engagement and active proxy voting strategy tailored for each company's interests and requirements



Step 2: Tools and Frameworks Evaluation

- Conduct a market analysis of existing ESG rating tools and frameworks
- Review existing (if any) ESG integration activities and process steps
- Assess which tool(s) and framework(s) are the best and most relevant to the fund managers' needs
- Decide on potential ESG monitoring and reporting tools tailored to the asset classes and targets of your portfolio
- Create an implementation strategy for on-boarding new technologies
- Document best practices relevant for your organization

Step 3: Training Design and Communications

- Conduct kick-off meeting and sessions for employee training and company-wide communication
- Work with internal teams to develop training material and embed the revised ESG investing strategies in daily processes
- Communicate best practices and next steps based on specific company needs, culture, and ESG goals
- Assist with client-facing materials and documentation



Step 4: Process Review and Monitoring

- Develop an ESG monitoring plan to ensure fund strategy is implemented in the long-run
- Refine ESG activities based on initial, mid-term and long-term ESG targets
- Conduct evaluation of progress against plan and set milestones (as needed)



WHO WE ARE

AMNle help companies and asset managers exchange information about value by using impact and Environmental, Social, Governance (ESG) language to balance risks and growth opportunities.

AMNle is committed to systemic value creation and is actively working towards the United Nations 2030 Sustainable Development Goals. AMNle is committed to:



OUR VALUES

AMNle's values align with both our line of work and how we each act during working hours and in our personal lives. AMNle's values are:



WHAT WE OFFER

AMNle offers opportunities to better the sustainability integration processes in profit, non-profit, and academic institutions. Our services range from advisory, partnership projects and education workshops. AMNle's offerings include but are not limited to:

- Agile end-to-end Sustainability and ESG integration methodology
- Advisory process paired with the technology tools, current frameworks, and partners to meet unique client context and needs
- Niche expertise in Environmental, Social, and Governance (ESG) solutions across sectors
- A fun and collaborative working style, using innovative tools and design methods
- 1:1 leadership advisory and trusted long-term partnerships

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