QONTIGO | SDI ASSET OWNER PLATFORM

SDI Dashboard

SDI portfolio analytics at your fingertips

The SDI Dashboard ingests client portfolios and maps them to the SDI AOP universe to provide direct access to a broad range of SDI-related portfolio analytics.

How does the SDI Dashboard work?

Data ingestion	Multiple portfolios can be uploaded directly into the cloud-based platform or via SFTP.
Mapping	Instruments in the universe are mapped to the SDI universe, leveraging Qontigo's proprietary Risk Entity Framework.
Aggregation	Data is aggregated to generate an overall portfolio view.
Access	The Dashboard can be accessed via Qontigo's cloud-based platform, reports can be extracted via API.
Slicing & dicing	Different views, e.g. by country or sector, are available.

Key benefits



Objective approach: The asset-owner led SDI AOP pursues an objective and transparent approach to accelerating the market adoption of Sustainable Development Investments.



Easy to use: Multiple portfolios can be easily uploaded, dashboards can be accessed using Axioma's cloud-based platform, and PDF reports can be downloaded via API.



Broad coverage: The SDI AOP universe currently comprises more than 9000 companies.



Transparency: The SDI AOP rules-based methodology is based on publicly available information.

Dashboards

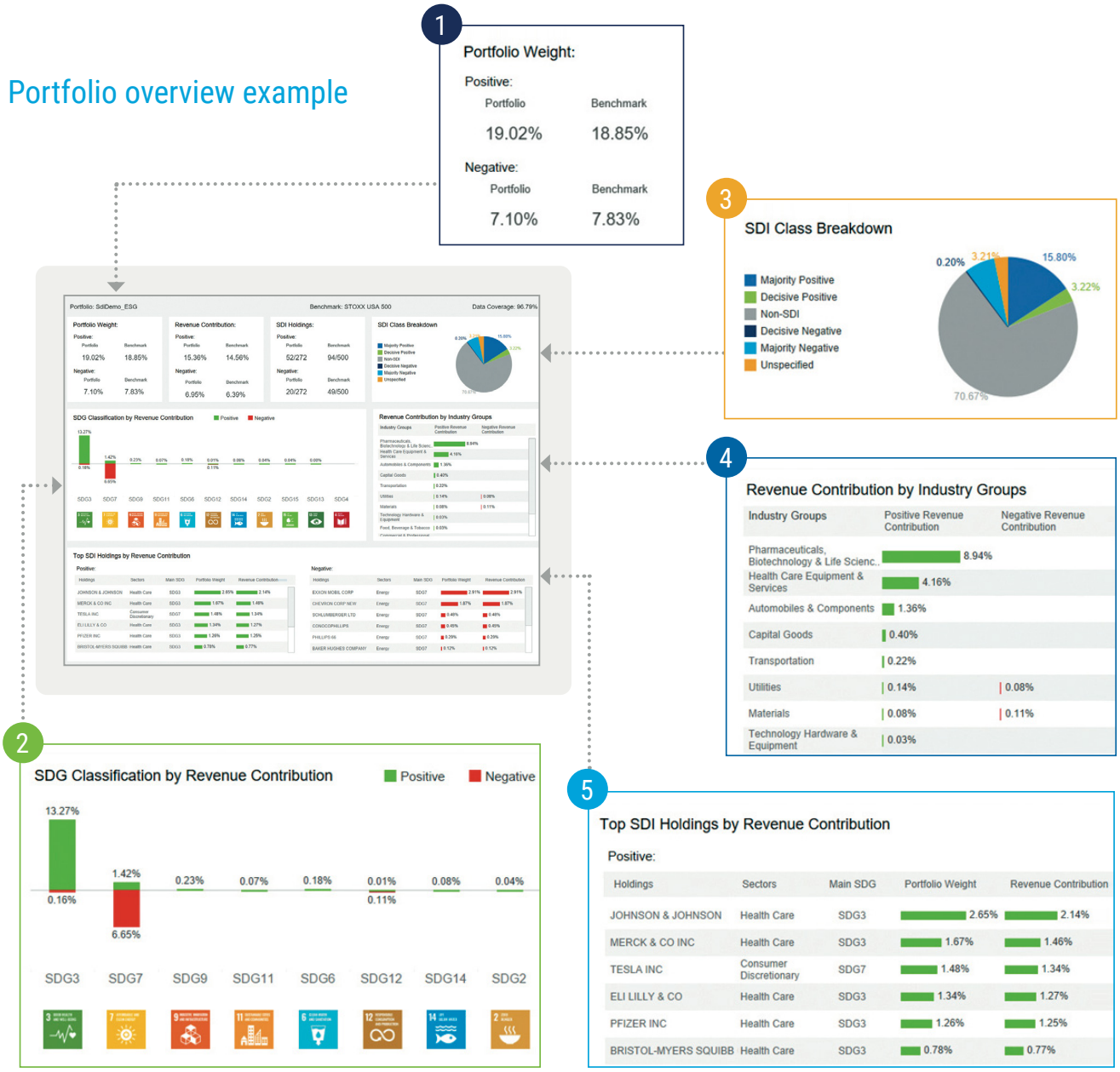
Three different dashboards provide valuable SDI information across multiple use cases.

1. **Portfolio overview:** Designed for overall monitoring, internal communication and client reporting. It provides multiple portfolio views, such as breakdown by SDI status and revenue contributions by categories (sectors, countries, etc.) as well as SDI alignment relative to the benchmark.

2. **Active contribution:** Supports research and portfolio managers. Allows users to slice and dice the portfolio in different categories and identify top positive and negative SDI holdings.

3. **SDG contribution:** Additional insights for research and portfolio managers. Provides a revenue contribution breakdown per SDG by different categories to quickly identify top positive and negative contributors.

Portfolio overview example



About the SDI AOP

The **Sustainable Development Investments Asset Owner Platform (SDI AOP)** is an asset owner led initiative launched by asset owners APG, AustralianSuper, BCI and PGGM in 2020. The SDI AOP works with investors to embed the UN SDGs into their investment processes and integrate SDG contributions into their portfolio management and reporting, enabling target setting and progress monitoring. The SDI AOP is responsible for the development and maintenance of the SDI taxonomy and guidance, SDI definitions and SDI classification methodology. Currently, the SDI Classification covers more than 9,000 entities across equities and fixed income and can be integrated into any investment process.

APRIL 2023

To learn more about SDI AOP data, email **sdi@qontigo.com** or visit **sdi-aop.org**

QONTIGO
AXIOMA | DAX | STOXX

SDI ASSET OWNER PLATFORM

Part of DEUTSCHE BÖRSE GROUP