Streamlined Sustainability Reporting

Our modular, end-to-end solution streamlines compliance with sustainability regulatory reporting requirements, from data sourcing through to the submission of disclosures.

Sustainability credentials – from climate change to broader environmental, social and corporate governance (ESG) considerations – are attracting regulatory scrutiny as they are increasingly prioritized by financial market participants seeking to manage risk, leverage market opportunities, and finance positive environmental and social impacts. Supervisory authorities in different jurisdictions are developing disclosure requirements to increase transparency in relation to sustainability claims and prevent greenwashing.

Intensifying reporting requirements

The sustainability reporting landscape is evolving quickly. This includes the EU's Sustainable Finance Disclosure Regulation (SFDR), Taxonomy Regulation, Climate Benchmarks, Green Bond Standard, Corporate Sustainability Reporting Directive (CSRD) and European Sustainability Reporting Standards (ESRS), as well as a range of similar mandatory measures being developed by other authorities around the world. Established and emerging market initiatives (including the PRI, TCFD, SASB, CSA, World Economic Forum, CDP, and TNFD) add to the sustainability reporting agenda.

Overcoming reporting challenges

Compliance with these requirements and standards presents a variety of challenges. In many cases, firms do not currently capture the required data. For example, they may not have complete sustainability data for all of their liquid investments. This problem is amplified for investments in alternative asset classes, for which access to good quality data can be even more challenging. When data is available, it is often siloed, maintained in different formats, and varying in quality. The large volumes involved (spanning thousands of fields per investment) can make manual processes untenable.

We are helping financial firms overcome these challenges by bringing together our industry-leading domain expertise, in-depth sustainability data, and advanced technology capabilities in a modular, end-to-end solution for sustainability regulatory reporting. Our solution encompasses:

– **Data:** The solution draws on our broad and deep sustainability data assets to fill gaps in your disclosures, including ESG and climate data at both the entity and asset level, which is used today by financial institutions with over USD 27 trillion in assets to manage their sustainability performance across asset classes (see below for details of individual datasets).

– **Data management:** The robust data management capabilities of our solution aggregate, validate, master and transform ESG data from proprietary and third-party sources into the format required by regulators. The data can be mapped to regulatory templates or mapped against the funds contained within portfolios.

– **Reporting:** Our solution automates the submission of reports to regulatory authorities and provides transparency into disclosures for different reporting regimes via a single, intuitive dashboard.

Key Stats

$27 trillion
combined AUM of firms that use our S&P Global ESG Scores and S&P Global Trucost climate data

200+
organizations use our EDM platform to manage their data

550+
firms use our Cappitech regulatory reporting solution for trade and transaction disclosures

700+
clients use our iLEVEL private markets portfolio monitoring solution

Key benefits

Domain expertise

We help firms upskill their in-house experts, define their sustainability strategies and implement end-to-end reporting architectures. We also help our clients keep up to speed on the latest regulatory developments at a time when reporting requirements continue to evolve.

Simplicity and efficiency

Our solution allows firms to simplify their reporting operations and increase efficiency by consolidating their disclosures on a streamlined platform.
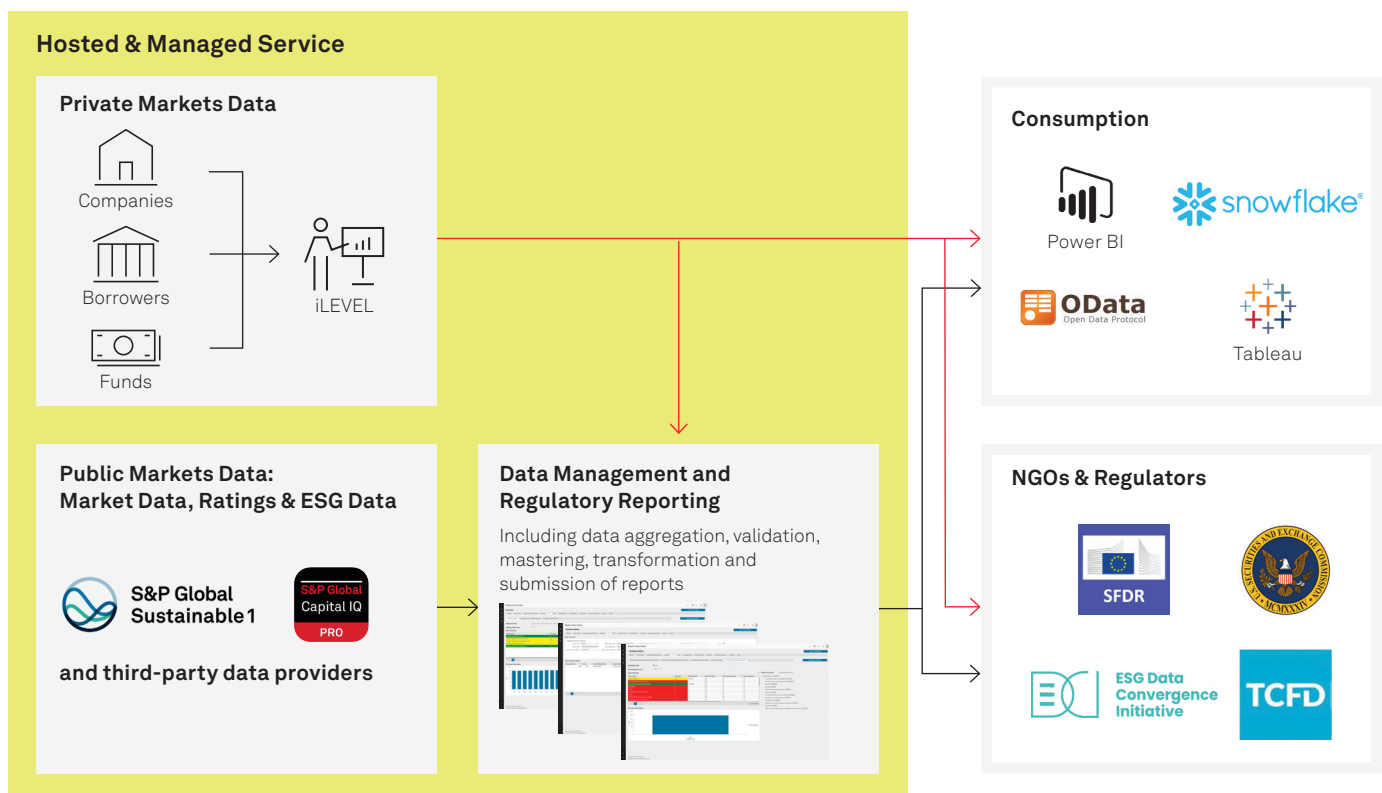
Managed service

Our solution is delivered as a hosted and managed service deployed in the cloud. As part of the managed service model, you can outsource the management of the solution infrastructure and application, and operational tasks, to us. The cloud-based deployment delivers flexibility and scalability.

Modular, end-to-end design

Our solution gives you the option to leverage a single provider to streamline the reporting process, from the sourcing of data through to the submission of disclosures. The modular design of the solution also makes it possible to use individual components to fill gaps in your own workflows.
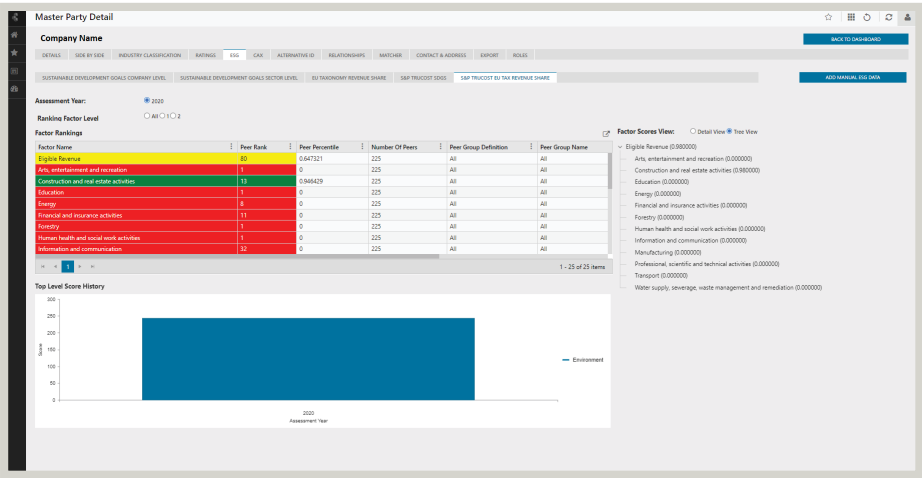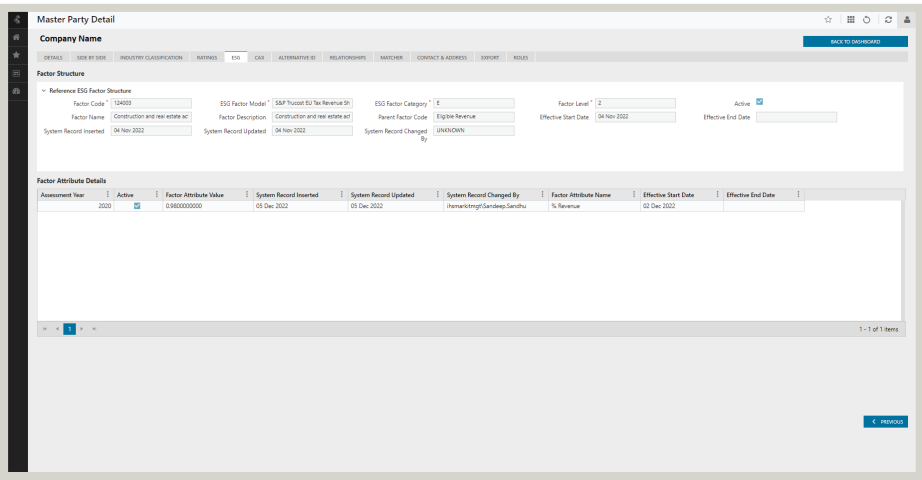
Sustainability Regulatory Reporting Solution

S&P Global Sustainability Reporting Datasets

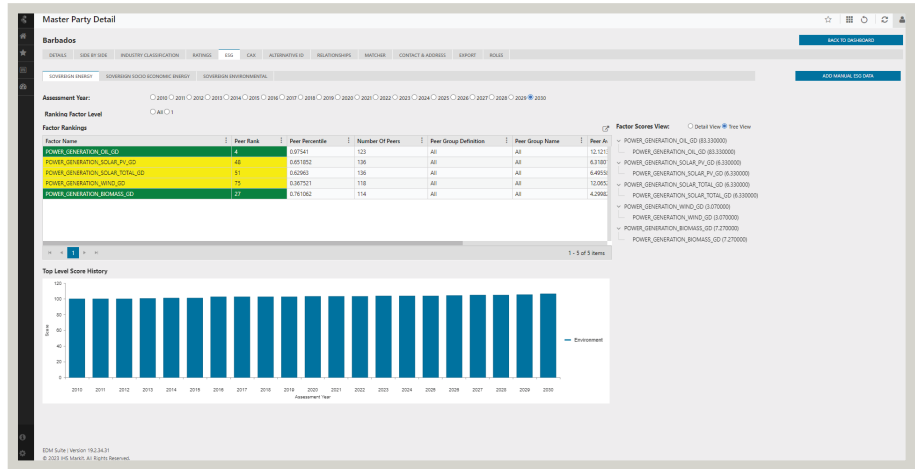| Dataset	Description	Coverage (number of companies)	History Initiated
Business Involvement Analytics	Assessments of common areas of investor concern pinpointing the precise level of involvement, from production to operations and distribution, to inform values-based investment strategies	15,000	2020
ESG Scores	ESG score, with environmental, social and governance-level individual score along with the underlying scoring criteria and weights, based on the S&P Global Corporate Sustainability Assessment (CSA) annual evaluation of companies' sustainability practices	11,300	2013
EU Taxonomy	Assessment of the Eligibility, Substantial Contribution (SC), Do No Significant Harm (DNSH) and Minimum Social Safeguards (MSS) requirements of the EU Taxonomy across equity and fixed income issuers	20,000	2020
EU Sustainable Finance Disclosure Regulation (SFDR)	Corporate-level indicators, corporate-level disclosure flags and sovereign-level indicators processed to align as closely as possible to the Principles Adverse Indicators (PAIs) that FMPs need to report on a quarterly basis as part of the SFDR requirements	20,000	2002
Trucost Environmental Data inc. sector revenue data	Measurement of environmental impact inc. carbon [greenhouse gas (GHG) emissions], land, water, air pollutants, waste disposal, natural resource and water use, fossil fuel reserves, power generation capacity and associated carbon metrics, alongside revenue generated from each sector or a company's operations	16,800	2002
Trucost Paris Alignment	Company-level alignment with the Paris Agreement goal to limit global warming to well below 2ºC from pre-industrial levels	14,000	2017

Sustainability Data Management Dashboard

Example dashboard providing an overview of information from the EU Tax Revenue dataset for a particular company. The high-level score is shown at the bottom of the screen. Individual factors can be seen on the right. The top view shows how each factor compares with the peer group.

Users can drill down on individual factors to see the underlying data, which in this case shows the percentage revenue.

Trucost Sovereign Energy data for Barbados displayed in dashboard, with historical record along the bottom.

About S&P Global Market Intelligence

At S&P Global Market Intelligence, we understand the importance of accurate, deep, and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

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