



Vision, Purpose & Mission	Impact Ambition	Corporate Strategy	Investment Strategy & Beliefs
Asset Allocation	ESG Integration	Products & Services	ESG Screening
Stewardship	Impact Investing	ESG Risk Management	Impact Measurement
Governance & Operating Model	People & Culture	Data & Tooling	KPI's & Incentives
Own Operations & Facilities	Transparency & Reporting	Capital Allocation	Ecosystems & Partnerships

Compliance

Lever	Description
 <b>Vision, Purpose &amp; Mission</b>	Direction on the type of business one intends to be, why it exists, and what greater cause it contributes to
 <b>Impact Ambition</b>	Stated positive impact in sustainability that is intended to be made by the business
 <b>Business Strategy</b>	Choices made to guide the direction of the business, including where to play, how to win, capabilities and management systems
 <b>Investment Strategy &amp; Beliefs</b>	Choices made to guide the investment decisions for a given portfolio to deliver on the stated impact ambition, business strategy and financial performance
 <b>Asset allocation</b>	Selection and readjustment of funds committed to each asset class in order to fulfil the stated investment strategy and impact ambition
 <b>ESG integration</b>	Incorporation of ESG factors into the investment valuation process
 <b>Products &amp; Services</b>	Depth, breadth, and product/market fit of ESG funds and related services (for external managers)
 <b>ESG screening</b>	Inclusion or exclusions of investment opportunities from the investible universe based on international norms (norms-based screening), connections to controversial activities (negative screening), or contributions to positive sustainability outcomes (positive screening)
 <b>Stewardship</b>	Exercising of voice or voting rights to steer management decisions from investment holdings towards more sustainable outcomes, OR own management decisions for majority/wholly owned investments
 <b>ESG Risk Management</b>	Processes and policies in place to identify, measure and act on risks of having a negative impact on sustainability or the company itself related to ESG topics

Lever	Description
 <b>Impact Investing</b>	Assets committed to having a positive impact
 <b>Impact Measurement</b>	Ability to quantify positive and negative sustainability impacts of a given investment decision
 <b>Governance &amp; Operating Model</b>	Organizational structure, capabilities and ways of working to deliver on the broader strategy and investment process
 <b>People &amp; Culture</b>	Employees, skills, processes and policies necessary to deliver on the broader strategy and investment process
 <b>Data &amp; Tooling</b>	Software, hardware, data and connecting systems necessary to support any aspect of the investment process
 <b>KPIs &amp; Incentives</b>	Stated targets and expectations for employees or stakeholders, supported by positive or negative outcomes to enforce intended outcomes in a fair and objective way
 <b>Own Operations &amp; Facilities</b>	Office space, travel policy or any activities conducted during the normal running of the business which have a positive or negative sustainable impact
 <b>Transparency &amp; Reporting</b>	External (audited and non-audited statements) and internal communication to stakeholders explaining the choices, performance and risks involved in the business
 <b>Capital Allocation</b>	Funds allocated among departments and projects internally necessary to support the strategy and investment process
 <b>Ecosystems &amp; Partnerships</b>	Relationships with external parties who provide capabilities, brand association, or other benefits to the company
 <b>Compliance</b>	Extent to which the activities, statements and policies of the company are in line with relevant regulation