



ESG RATINGS AND ADVISORY

Apex Group

To impact business today for a
sustainable tomorrow



“ A world class ESG Ratings & Advisory service that influences significant behavioural change, driving capital flow towards ESG performance and better companies. ”

What is Apex offering?

Quality ESG data capture, analysis and reporting is now critical for ensuring risk mitigation and sustainable returns for investors. The ESG sector is exploding in the face of stakeholder pressure, anticipated regulation and a growing sense of obligation towards people and planet.

Apex ESG was set up to satisfy an overwhelming demand for a high-quality, independent, end-to-end service to fulfil private sector ESG needs not seen in the market. Our expert Ratings Service covers the full range of ESG issues, up to date, specific and flexible to the client.

Context

ESG continues to become an increasingly relevant, mainstream factor in investment, driven by investors, employees, consumers, a moral obligation and an increasing Fiduciary and Regulatory responsibility.

State of the market

Whilst the listed space has a variety of providers, there are few reputable independent, global ESG Providers for the private markets providing this holistic ESG service, until now. We offer first mover advantage to clients for a market that is hungry for ESG competence.

ESG is now key

HOLISTIC PERFORMANCE



Purpose is the path to profit. Responsible business management and mitigating risk leads to a long term and competitive advantage and becomes more attractive to investors.

CLIMATE CHANGE



Climate change is accelerating. Fast, innovative solutions are needed to halt the damage and often begin from the ground up.

SHIFT TO PURPOSE



Employees now want to work for companies that are purpose driven with excellent governance. Recruitment, retention and motivation are key.

REGULATORY & FIDUCIARY



National and Supranational Governments and Unions are regulating across the ESG universe. Show market leading credentials before being forced to change.

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Product cascade

ESG HEALTH CHECK

- Quantitative overview
- 36 easy to answer questions
- Quick and simple

ESG INVEST CHECK

- For investment managers
- Align to key ESG regulations and leading standards in the financial sector
- 30 questions focused on the investment cycle
- Improve ESG investment policies and approaches based on best practice

ESG RATING, REPORTING & BENCHMARKING

- Comprehensive dataset (300+ individual data points)
- Quantitative scoring and reporting
- Benchmark against best-in-class ESG standards, sector peers, UN SDGs and performance over time
- Live incident reporting and reputational risk analysis

CARBON FOOTPRINT ASSESSMENT

- Assess climate impact based on key frameworks
- Energy consumption evaluation
- Calculate Scope 1 and Scope 2 emissions footprint
- Identify and quantify key Scope 3 sources of emissions
- Strategic roadmap for improvement

Additional services

EXCLUSION SCREENING

Filtering tool for controversial topics such as weapons, gambling, tobacco, palm oil, coal etc.

GAP ANALYSIS

Tailored advice on how to drive ESG performance, aligned to sector best practice, leading ESG standards and UN Sustainable Development Goals.

BUREAU SERVICE

Let Apex undertake all administrative and logistical tasks throughout the ESG assessment cycle, with additional support for submitting to ESG-focused memberships.

RISK ASSESSMENT

Identify key ESG risks segmented by issue, incidents, impact, probability, rating and mitigation.

We have developed a unique cloud-based digital platform to provide comprehensive in-depth tailored reports for our clients



The Apex Difference

INDEPENDENT

Rating integrity achieved due to an independent, external Apex data collection, ESG analysis and methodology.

BENCHMARK TOWARDS EXIT

Benchmark towards exit success through the Apex E-Daption curve.

BEST PRACTICE STANDARDS

End-to-end solution aligning with key ESG Global Standards and UN Sustainable Development Goals.

REACH AND PRESENCE

Apex has 45 offices and 3,500 employees based across the world.

CLIENT CENTRIC APPROACH

A secure, user-friendly, online platform that delivers a simple, efficient and customizable reporting experience with support services included.





ESG COVERED

3 Pillars	Global Standards	13 Themes	Example Issues (300+ data points)
Environment	     	Environmental Management	Environmental Policies, Environmental Management
		Climate Change Strategy	Climate Risks & Climate Opportunities
		Environmental Footprint	Emissions, Energy Consumption, Water Use, Waste Generation
Social	      	Human Capital Management	Employee Development, Engagement, Diversity, Remuneration
		Health, Safety & Well-Being	Health, Safety & Well-Being Approach & Metrics
		Corporate Citizenship	Philanthropic & Community Engagement
		Human & Labour Rights	Compliance, Due Diligence, Mitigation & Remediation
Governance	     	Business Model & Strategy	Corporate Sustainability, ESG Materiality, Stakeholder Management
		Corporate Governance	Policy, Ownership, Oversight & Performance
		Business Conduct	Codes of Conduct Policy, Data Protection, Cybersecurity, Tax Transparency
		Product Strategy	Product Governance, R&D, Impacts & Management
		Risk Management	Risk Management Framework, Sensitivity & Scenario Analysis
		Supply Chain Management	Supplier Code, Risk Management & Sustainability

GLOBAL REACH, LOCAL PRESENCE

Our Network of Offices



We have over **3,500** employees delivering tailored solutions to clients globally

WHO WE ARE

- Apex Group is a global financial services provider.
- Our solutions are trusted by clients to provide the operational and administrative foundations for their business.
- We are a pioneering new single-source operating model to resolve complexity and deliver efficiency.

WHAT WE DO

- Our expert teams deliver private clients and family offices with tailored solutions to meet their needs. We understand that no client is the same and therefore we treat each relationship individually to elevate our value as your partner.
- We deliver a broad range of financial solutions across the asset management, private clients and capital markets space.

OUR PURPOSE

- To be stewards of the financial services ecosystem and protect the assets of our clients at a time of increased regulation and complexity.
- To provide a unique single-source solution delivered by the best people in the industry - to streamline our clients' day-to-day activities and provide all the services they need under one roof.





theapexgroup.com

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