



# GLOBAL 1000

SUSTAINABLE PERFORMANCE LEADERS

Exclusively on Justmeans

Powered by SmartView® 360

## Justmeans Webinars: Sustainability & CSR Ranking

Presented by: **Michael Muyot**

President & Founder, CRD Analytics

## About CRD Analytics

**CRD Analytics is a leading provider of independent investment analytics, specializing in ESG & Sustainability.**

Using its proprietary SmartView Technology Platform, CRD Analytics empowers its clients with actionable and performance-driven information distilled from large sets of complex data including financial, environmental, social, governance and patent information.

CRD Analytics partners with its clients to construct proprietary index-based products – Exchange-Traded Funds (ETFs), separately-managed accounts, mutual funds and Unit Investment Trusts (UITs). For more information about CRD Analytics, go to <http://www.crdanalytics.com>.

Our Mission...

*Making Sustainability Investable*

# What are the Global 1000 Rankings?



Top 1000 Global Public Companies Ranked by SmartView® 360



200 Financial, Environmental, Social & Governance Metrics



NASDAQ OMX CRD Global Sustainability 50 Index (QCRD)



Global Reporting Initiative (GRI) G3 Guidelines

# Sustainability Rankings - Far Reaching Impact



# Why Do Investors Care?

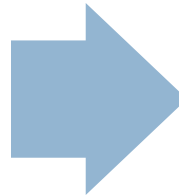
## Global 1000 Rankings : Financial Indexes & Portfolio Diagnostics

Traditional Financial Performance

$$\text{Sustainable Investing} = f \left( \underbrace{\text{Financial Analysis}}_{\text{Traditional Financial Performance}}, \underbrace{\text{Environmental Impact, Social Responsibility, Corporate Governance}}_{\text{ESG Performance}} \right)$$

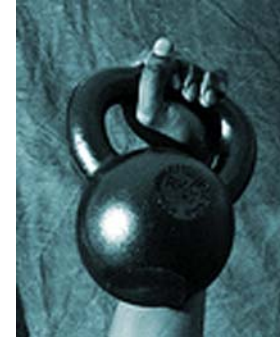
### Goals of Sustainable Investing

Improve risk management  
Uncover profit opportunities  
Identify trustworthy management



Illuminate sustainable, long-term investments to maximize shareholder value.

# The Power of Numbers



**\$26.5 Trillion of AUM will be ESG Screened (by 2015)**



**11-15% of Global Assets use ESG metrics**

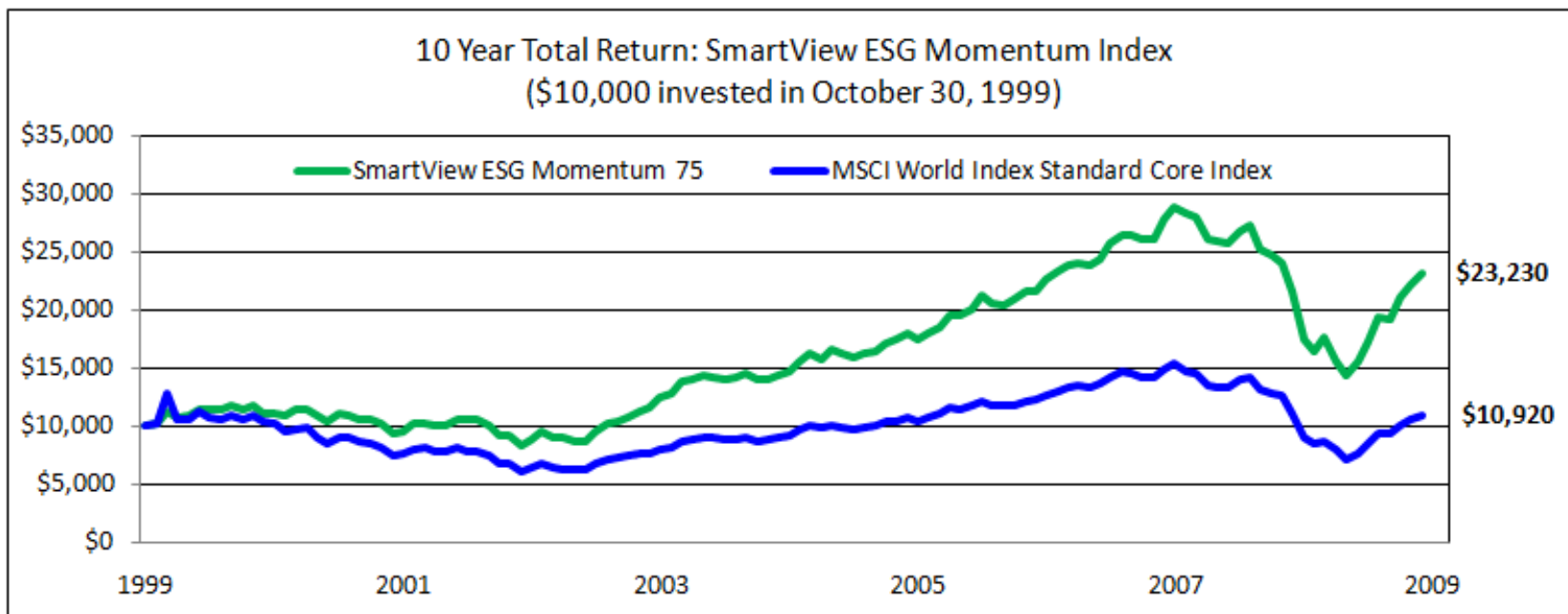


**PRI Signatories tops 800 = \$20 Trillion AUM (9.15.10)**

Source: Robeco/Booz

# Sustainable Performance = Outperformance

## Sustainable Momentum Index | Powered by SmartView® 360



In a rigorous quantitative study conducted by CRD Analytics with quantitative back-testing performed by industry leader Indxis, global companies that improved on ESG Performance from 2006 to 2008 outperformed the MSCI World Index by over 11.6% from 2008 to 2009. Top 75 constituents were used in the back test unless their initial trading date is subsequent to 10/29/1999 or they do not have shares outstanding in the database. Constituents were equally weighted as of the last trading date in April and October for the period 10/29/1999 through 11/30/2009; full results are available upon request.

# How Leaders are using Global 1000 Rankings?



## Real-time Communication

- Engage Responsible Investors
- Improve Marketing Messages



## Improve ESG Disclosure

- Discover Missing Data
- Fix Incorrect Data



## Peer Benchmarking

- Discover Competitive Advantages/Disadvantages
- Identify Competitive Threats/Opportunities

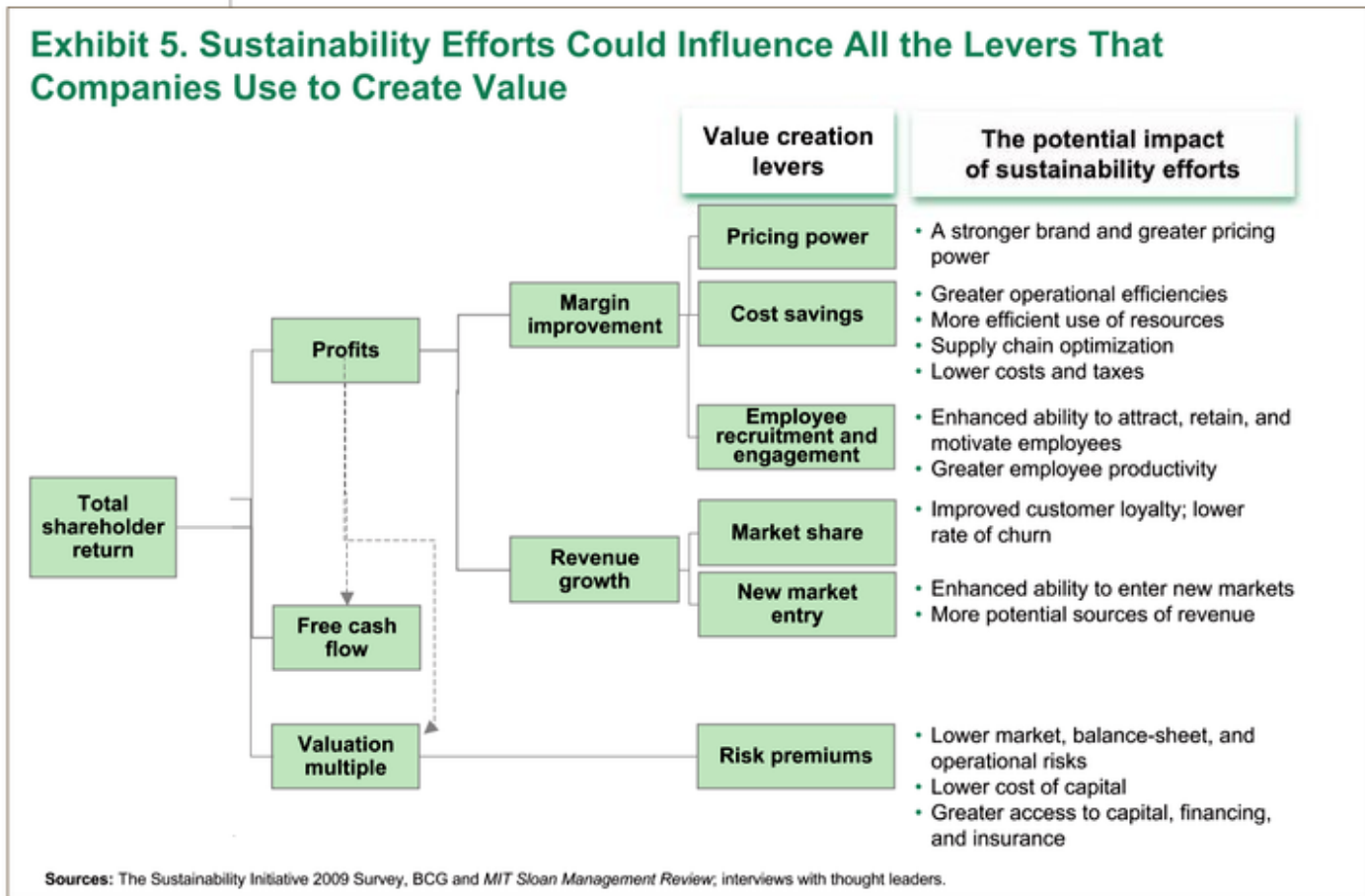


## Strategic Planning

- Illuminate Risk & Opportunities
- Engage Cross-functional Team

# Sustainable Performance = Increase in Shareholder Value

*A recent study by Boston Consulting Group and MIT Sloan Management Review discusses how sustainability is changing the competitive landscape and reshaping the opportunities and threats that companies face.*



# SmartView<sup>®</sup> 360 Methodology

## SmartView<sup>™</sup>

**SmartView<sup>™</sup> Process:**  
*Making Sustainability Investable*

Patent Pending



### SmartView Screening Algorithms

- Technical Criteria
- Fundamentals
- Investment Style
- Geographic
- Environmental
- Governance
- Social

### SmartView Performance Driven Portfolios

- Index Ready
- Best-in-class
- Force-ranked
- Optimized

### SmartView Force-ranking Algorithms



- Analysis
- Modeling
- Mapping

- Benchmark
- Score
- Weight
- Rank



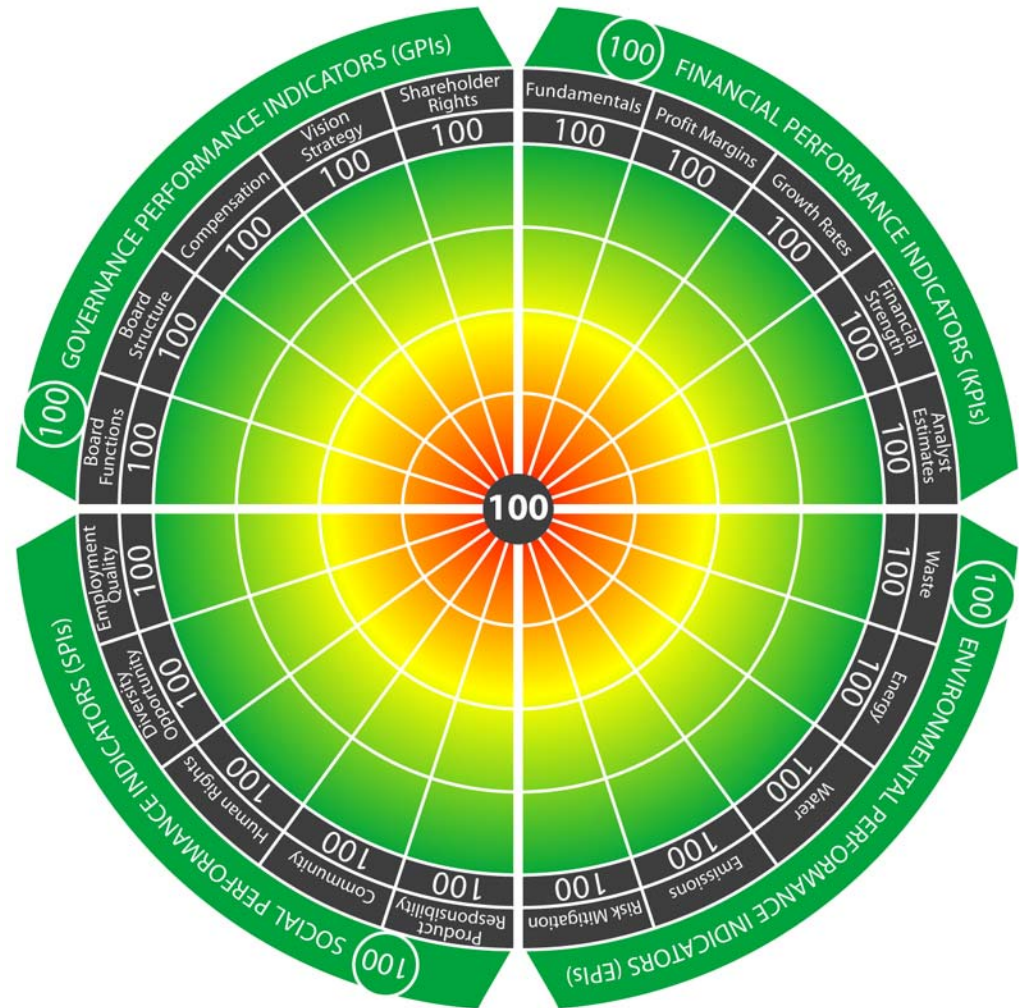
# SmartView: A 360° View of a Corporation

4 Dimensions (F.E.S.G)

20 Key Performance Indicators

200 Performance Metrics:

- **25 Financial Fundamentals**
- **24 Quantitative Environmental**
- **4 Qualitative Environmental**
- **13 Quantitative Social**
- **48 Qualitative Social**
- **72 Qualitative Governance**
- **7 Quantitative Governance**
- **7 Technical**

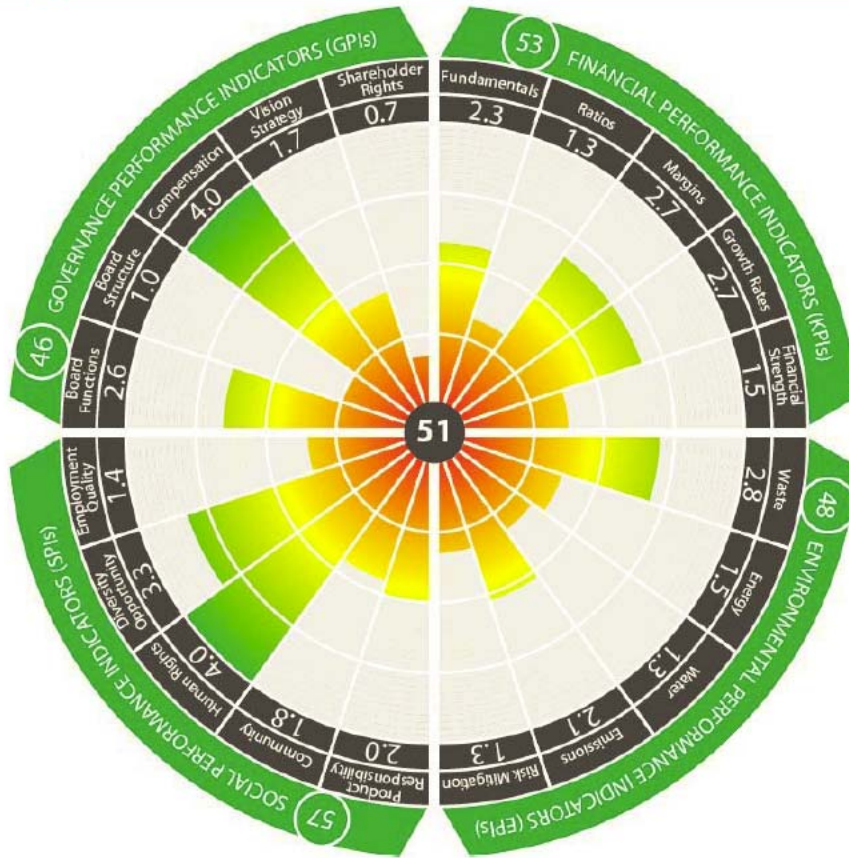


SmartView Patent Pending

# SmartView 360: Sustainable Performance

Dell Inc.

(Exchange: NASDAQ, Ticker: DELL)

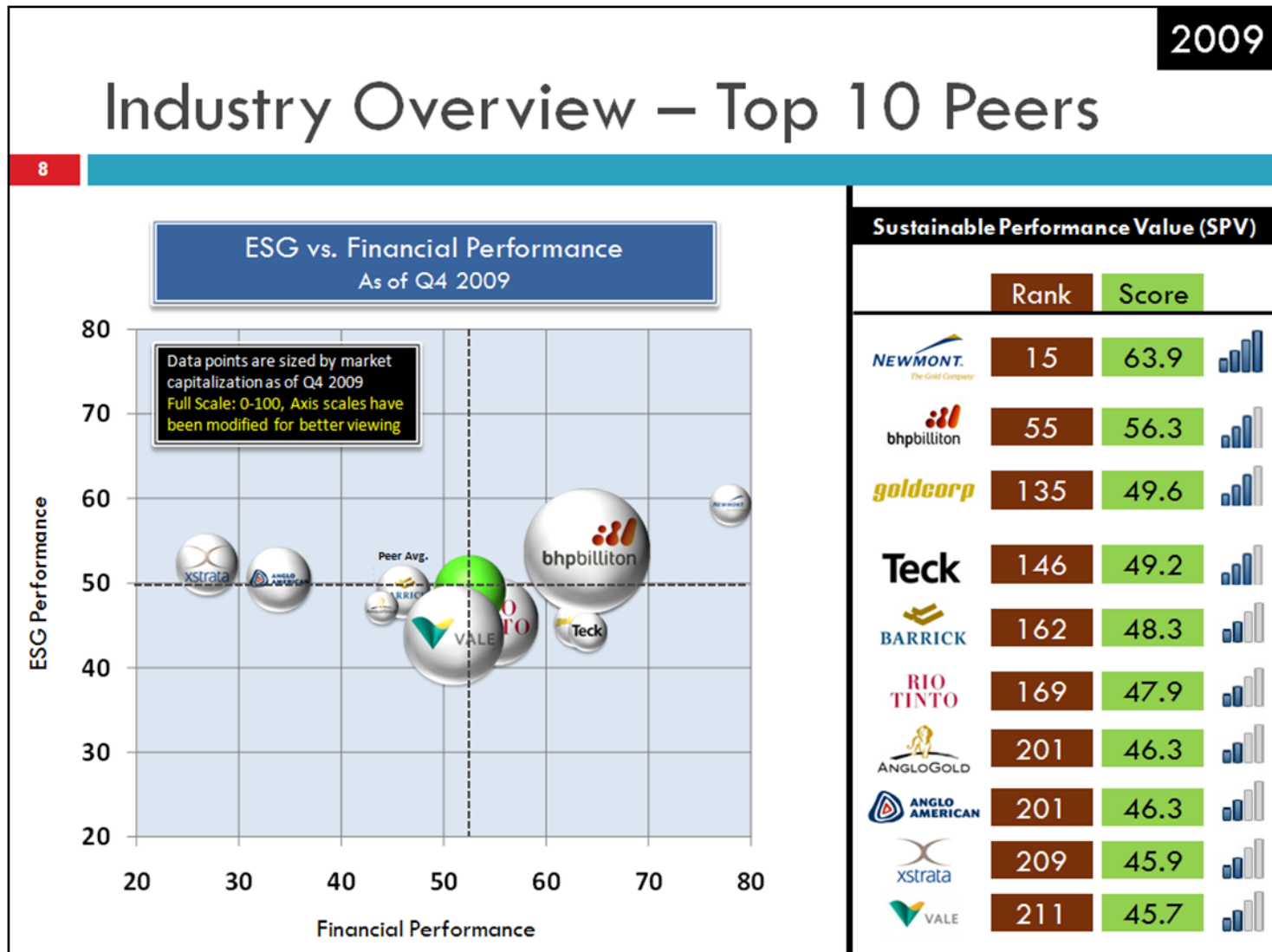


3 Bars = Leader

## Sustainability Snapshot

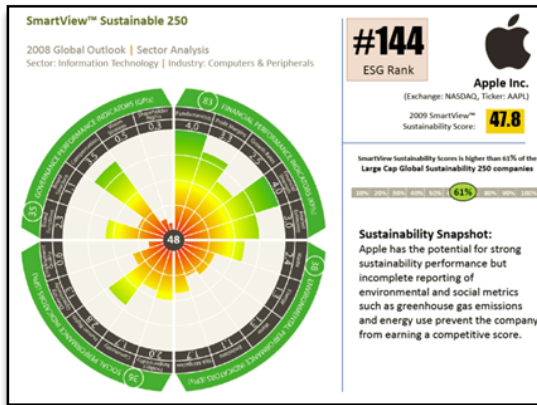
Dell is a sustainability leader in the Computers industry but the company lags significantly behind IBM and HP in all categories. In particular, Dell reported only 56% of all Environmental Performance indicators, compared with 92% for IBM and 76% for HP.

# SmartView 360: Industry Benchmarking

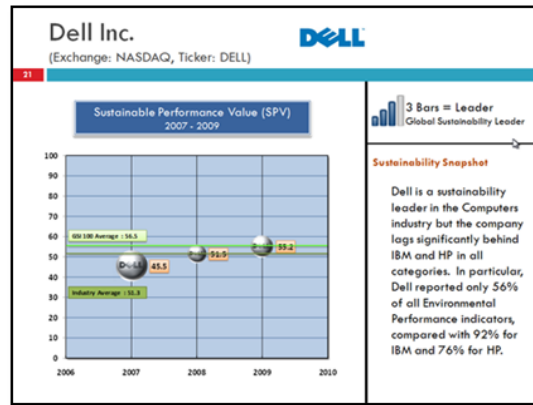


# Sustainable Insights: Reports Available to Purchase

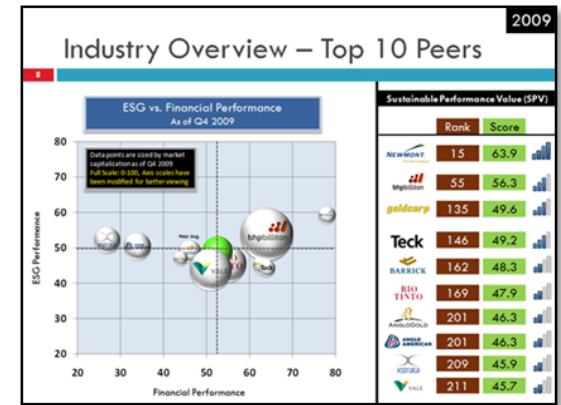
## Company Profile



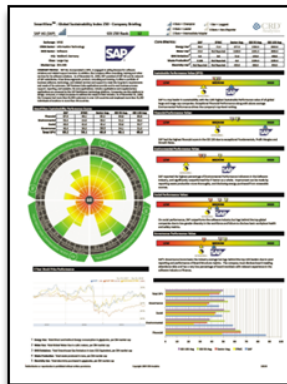
## Company Focus



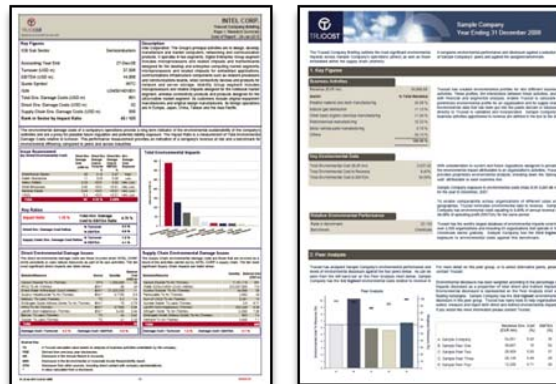
## Industry Benchmark



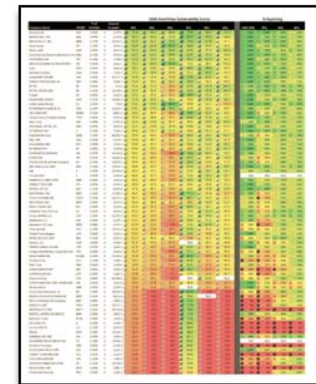
## Company Briefings



## Company Briefings (Trucost)



## Custom Benchmarking



## The Power of SmartView<sup>®</sup> 360

SmartView<sup>®</sup> employs over 200 financial, environmental, social and governance performance metrics. CRD Analytics is an organization stakeholder of the Global Reporting Initiative and uses the G3 guidelines as a foundation for selecting which metrics to include for rankings, indexes and portfolio diagnostics. The GRI is increasingly considered the gold standard by many, and was referred to in the recent SEC Guidance as a recommended set of protocols for companies to follow when disclosing ESG risks in regulatory filings like 10-Ks.

# Thank You!

**Michael Muyot**

President & Founder, CRD Analytics

[mmuyot@crdanalytics.com](mailto:mmuyot@crdanalytics.com)

**Miriam Eaves**

SVP of Business Development

[meaves@crdanalytics.com](mailto:meaves@crdanalytics.com)