

Introducing Zephyr's ESG Analysis

ZEPHYR Plan. Invest. Monitor. Grow.

Powered By  OWLanalytics

Evaluate your investments through our new ESG Ratings, Scores, Percentiles & Rankings

Research, screen, report & monitor Mutual Funds, ETFs, SMAs & Equities on numerous ESG metric ratings, scores, percentiles & rankings.

ESG Analysis includes:

- Comprehensive Screening to identify best-in-class funds
- Peer comparisons across strategies on numerous ESG metrics
- Portfolio reporting to demonstrate to clients the Environmental, Social, Governance responsibility of their investments
- Acquire new clients by integrating sustainability and responsibility into your business
- Enhance your story building and create ESG focused marketing materials

ESG Analysis to compliment a full suite of analytics and reporting tools

Coupled with Zephyr's trendsetting Presentation Center, you can include the full suite of Zephyr ESG, analytics and reporting tools to:

Create fully customized pages & reports or choose from our robust pre-defined analysis.

Provide your clients with a comprehensive, yet easy to interpret report, that uncovers their adherence to responsible ESG investing

Combine the new Zephyr ESG analysis with our powerful analytics to build a complete investment portfolio story.

Want to know more?

Request a demo of Zephyr's ESG Analysis:

EMAIL: Sales.Financial@informa.com today!

WATCH: [Our latest video!](#)

ESG Screen

ENVIRONMENTAL	SOCIAL	CITIZENSHIP	GOVERNANCE	HUMAN RIGHTS	STOCKHOLDERS	POSITION	ESG
SCORE	SCORE	SCORE	SCORE	SCORE	SCORE	SCORE	SCORE
68.00	53.00	53.00	53.00	53.00	53.00	53.00	53.00
64.00	53.00	53.00	53.00	53.00	53.00	53.00	53.00
48.00	53.00	53.00	53.00	53.00	53.00	53.00	53.00
68.00	53.00	53.00	53.00	53.00	53.00	53.00	53.00
64.00	53.00	53.00	53.00	53.00	53.00	53.00	53.00
48.00	53.00	53.00	53.00	53.00	53.00	53.00	53.00

ESG Snapshot-Catalyst Buffered Shield Fund I

January 2021



ESG Scorecard

May 17, 2021 | 13/14

ESG Scorecard - Catalyst Buffered Shield Fund I

As of Jan 2021

ESG KPI Score - Catalyst Buffered Shield Fund I	Change m-o-m	Score	Social	Change m-o-m	Score	Governance	Change m-o-m	Score
Pollution Prevention	▲	68.00	Citizenship	▲	45.33	Board Effectiveness	▲	68.00
Environmental Transparency	▲	64.00	Community & Charity	▲	54.00	Management Ethics	▲	57.00
Resource Efficiency	▲	48.00	Human Rights	▲	53.00	Disclosure & Accountability	▲	60.00
- Sustainability Integration	-	38.00	-	-	-	-	-	-
- Employer	-	59.33	-	-	-	-	-	-
- Compensation & Satisfaction	-	61.00	-	-	-	-	-	-
- Diversity & Rights	-	59.00	-	-	-	-	-	-
- Education & Work Conditions	-	58.00	-	-	-	-	-	-
Total	▲	57.33	Total	▲	53.83	Total	▲	61.67
Universe median	▲	53.00	Universe median	▲	53.83	Universe median	▲	45.33

Universe = Options-based Universe