



CASE STUDY

Assessing and Ranking Global Asset Management Companies on their ESG Focus



Client A Financial Think Tank



Industry Financial Services



Solution Index Intelligence



Region Global





OBJECTIVE AND SCOPE

The client, a non-profit financial think tank, wanted to assess Financial Institutions (FIs) and financial asset management companies globally on their commitment, policies, and actions to eliminate anti-ESG activities from their investments. The client sought Benori's support to:

- Gather secondary data on each company and their investment policies and ESG focus
- Rate them according to a specific indicators' list and parameters





APPROACH

We conducted secondary research to understand the guidelines, policies, actions, activities related to ESG for asset management companies, analysing publicly available information and media activities for these companies and their group companies to ascertain their ratings.



METHODOLOGY



**Secondary
Research**



**Primary
Research**



**Data
Modelling**





IMPACT

Our research helped the client in:

- Understanding the commitment of global financial asset managers towards ESG
- Advising companies on strategies to achieve net-zero financial system



SAMPLE OUTPUT

Industry Distribution

Measure	Scoring	Company	ESG Status	F1a - Plans	F1a - Action	F1a - Evidence	F1b - Plans	F1b - Action	F1b - Evidence	F1b - Comments
356	356	Shardhana		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
357	357	Unilever		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
358	358	Wipro		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
359	359	Zee		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
360	360	Axis Bank		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
361	361	Capgemini		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
362	362	Deloitte		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
363	363	Genpact		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
364	364	Infosys		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
365	365	JP Morgan Chase		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
366	366	Microsoft		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
367	367	Oracle		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
368	368	Salesforce		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
369	369	Tata Steel		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
370	370	Walmart		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5
371	371	Yielder		Yes	Yes	Yes	Yes	Yes	Yes	Overall rating of 2.5

Functions/Role performed by ESG Stakeholders

Common themes for ESG Initiatives



Benori is a trusted partner for knowledge solutions across the globe, serving clients from a wide range of industries including Professional Services, Financial Services, Consumer & Retail, Technology & Internet, Industrials & Manufacturing, and more. Our customized solutions strengthen the insights value chain of our clients, empowering them with key insights needed to drive intelligent decision-making and accelerate growth.

Headquartered in India, Benori is uniquely positioned to deliver multilingual research needs of global clients, powered by its digital agility, deep research capabilities and a highly experienced leadership team. Adopting a 360-degree approach, our team employs a combination of diverse methodologies including primary research, secondary research and data modeling, and offers detailed foresight on market trends, competitive shifts, regulatory changes and technological advancements.

Powering Growth Through Knowledge

 info@benoriknowledge.com

 www.benori.com



BENORI