

Final Scoring – Self Assessment

ESG Disclosures	Score	Comments / Recommendations	Total Score	Avg Score
Requirements and Recommendations				
Requirements- General				
Requirements- Sources and Types				
Requirements- Systematic Consideration of Financially Material Information				
Requirements- ESG Investment Universe				
Requirements- Screening				
Requirements- Portfolio-Level ESG Characteristics				
Requirements- Portfolio-Level Allocation Targets				
Requirements- Portfolio-Stewardship Activities				
Requirements- Environmental and Social Impact Objectives and Recommendations				
Organisational Requirements				
Risk Management				
Conflicts of Interest				
Product Governance				
Costs involved				
Information to be provided to the client				
Information to be gathered from the client				
Capture sustainability preferences				

