



Introducing the HOLT[®] Sustainability Suite

October 2022

The HOLT Sustainability Suite combines financial and ESG metrics to help assess a company's business model.

Traditional ESG providers aim to offer a comprehensive assessment of ESG risks. This is increasingly an area of debate given the dispersion of ratings among providers and the challenge for investors to understand how ratings are derived.

HOLT's approach to address these challenges is to focus solely on ESG data points that are systematically and comprehensively disclosed, with a direct and quantifiable impact on the CFROI® and valuation of a stock.

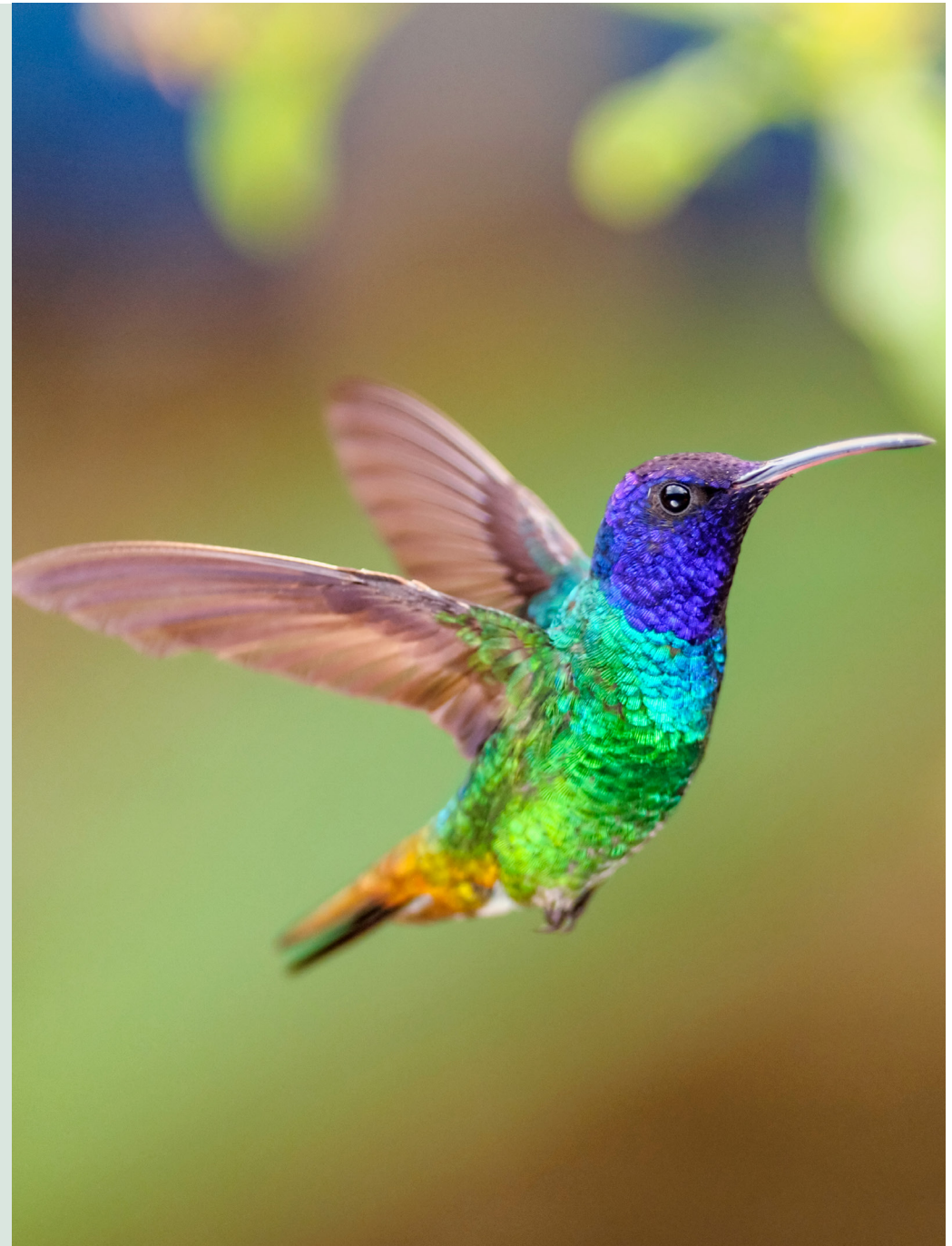
HOLT offers high quality financial data built around its rigorous, systematic, and proprietary adjustments to accounting data in order to better understand the corporate performance and valuation of companies. Capitalizing on this extensive experience, HOLT has developed the Sustainability Suite to further enhance the investment process of institutional investors.

HOLT's Sustainability Suite allows investors to assess how ESG issues can impact corporate performance, capital allocation, financial flexibility, and valuation.

Data and tools are available from high-level screening down to single company modelling, helping to identify companies that score well on traditional ESG but may not be sustainable businesses in the long-term.

Tailored and bespoke HOLT solutions are available to suit individual investment needs.


- Those in the early stages of incorporating sustainability into their investment process can work with HOLT specialists to understand the landscape and integrate the HOLT Sustainability Dashboard into their work flow.
- Experienced ESG investors can customize HOLT data and leverage HOLT's more advanced ESG solutions including Governance, Pay for Performance and Carbon Analytics tools.



How sustainable are a company's business practices?

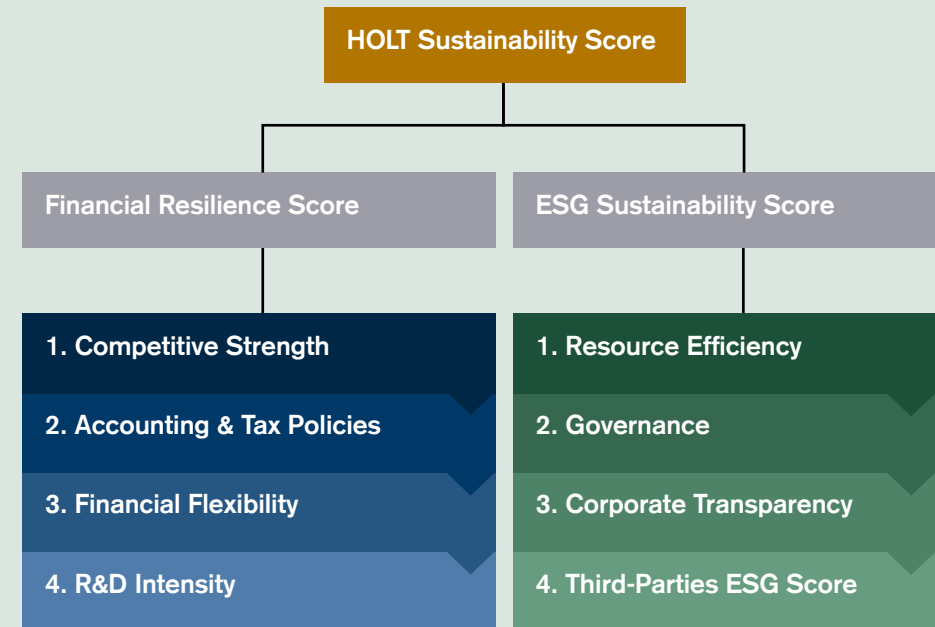
The HOLT Sustainability Dashboard provides a series of financial and ESG data-points that enable investors to enhance their conviction levels on the long-term operating resilience of a business.

The HOLT Sustainability Dashboard is divided into two key components:

 Hover over the tabs to find out more

The Dashboard can be used at the single stock level to assess the long-term sustainability of a business. It can also be used as a screening tool to identify outliers where specific red flags may need to be investigated further. Users can also opt to receive data files or APIs to incorporate the data into their own in-house proprietary ESG and financial solutions.

HOLT Sustainability Score construction



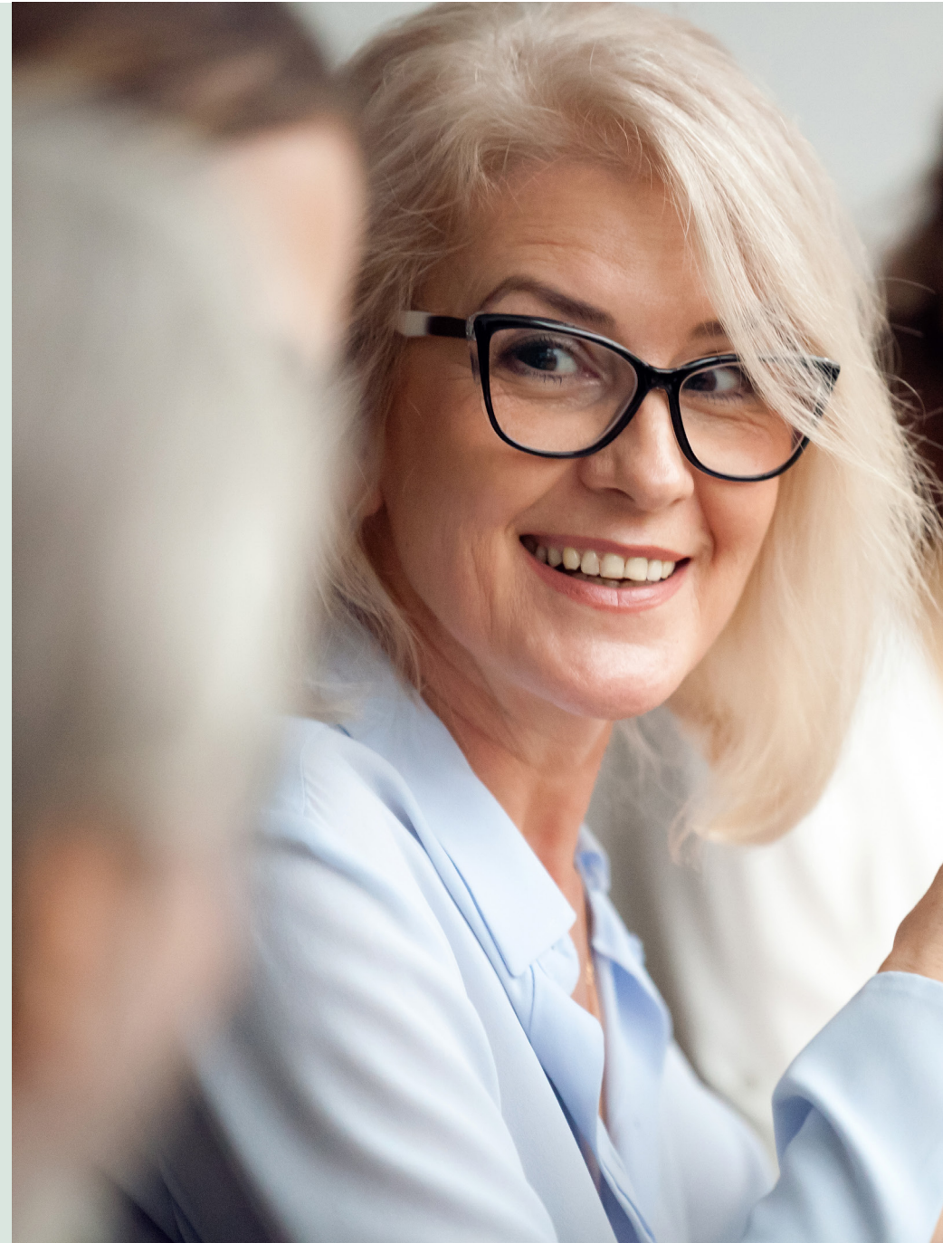
Do you trust the CEO and Board to do the right thing?

Any publicly held company has an agency problem – the shareholders and executives of the business are different and sometimes have misaligned objectives. This can be mitigated by robust governance practices which serve to align CEO incentives with long-term shareholder wealth creation.

HOLT Governance features two primary sections:



Hover over the tabs
to find out more



What is the carbon risk of a firm?

HOLT Carbon Analytics allows investors to directly quantify the carbon exposure and risks at the company level or across a broader universe.

HOLT Carbon Analytics

1. Quantify a company's carbon footprint today and how rising carbon costs may impact its corporate performance and valuation
2. Determine if a company has the financial flexibility to invest in capital to lower its carbon footprint
3. Assess how carbon transition plans will impact a company's profitability, credit fundamentals and equity valuation

The product allows for screening and benchmarking of companies on these metrics across any universe or portfolio.

HOLT Carbon Analytics offers quick and easy scenario modeling of different future carbon regimes and different time horizons to net zero, as well as issuer-specific detailed modeling of carbon transition scenarios.



Learn more

HOLT helps investors improve the decision making process by using an objective framework for comparing and valuing stocks. HOLT offers clients unique insights into corporate performance and valuation, emphasizing a company's cash generating ability and overall potential for value creation.

HOLT Lens™ is an online platform with a full suite of interactive tools to help investors make more confident investment decisions across our database of 20,000 companies (over 98% of total world market capitalization).

The introduction of the HOLT Sustainability Suite allows investors to assess how ESG issues can impact corporate performance, capital allocation, financial flexibility, and valuation.

For any questions or to arrange a trial, please contact us.

Questions and feedback

 holt.esg@credit-suisse.com





Hover over the tabs to
find out more