

Case Study: Undivided Ventures - Simplifying Impact Reporting

“ESGⁱ's streamlined and integrated approach allows us to closely collaborate with our Portfolio Companies and provide them with the support they need the most, to deliver on their business and impact objectives.”

Alex Bent, Managing Partner, Undivided Ventures.

Overview

[Undivided Ventures](#) ('Undivided') is a Hong Kong based Venture Capital company, investing in early-stage companies that seek to make a measurable, positive impact on the built environment's most urgent sustainability challenges.

Undivided invests across five themes with the most material impact on the sustainability of the built environment: Decarbonisation, Climate Adaptation, Circularity, Nature Positive and Social Value.

“Sustainability is in our DNA, and we are experts in understanding how to measure, manage and report sustainability impact and value.”

Initial Objective

Undivided need a scalable solution that allows them to capture, monitor and report on Portfolio Company (PortCo) impact metrics. This solution should support the tracking of PortCos sustainability performance over time as well the reporting to Undivided's Limited Partners. Undivided's reporting aims to comply with SFDR Article 9 as it is recognised as best practice in sustainable investment disclosure.

Undivided Ventures operates a lean operational structure and therefore required a solution that has operational efficiency at its core, and additionally minimises onboarding time and reporting effort for PortCos, ensuring their teams remain focussed on growth.

Initial requirements for the platform:

- A user-friendly solution for PortCos to capture and report Impact metrics Quarterly and Annually
- A solution that supports collection of both industry standard and Undivided's own impact metrics
- Dynamic platform where historic metrics can be held alongside new data and all information can be amended and updated in real time
- Functionality to capture metrics at individual PortCo level but also to aggregate and report at Product level
- In-built user management to enable both VC and PortCos to manage access for their teams

Partnering for success

Undivided subsequently partnered with [ESGⁱ](#) to deliver additional functionality:

- To create a reporting Dashboard to provide relevant fund metrics for internal users and LPs
- Investment themes - grouping metrics by VC-defined investment theme so that PortCos can focus on most relevant metrics to their activities
- Operational and Financial metric reporting - consolidating additional offline reporting into the same secure solution
- On-platform stewardship - enabling data to be requested or challenged with comments, triggering notifications in the platform, and removing need for offline emails.
- Data access control - giving each reporting PortCo full control over who can access their metrics



The Solution

ESGⁱ is the ESG data and reporting software platform developed and managed by [Element22 Limited](#) - a boutique Data Management and Analytics firm. Data management best practices, developed over many years of award-winning Industry leadership, are embedded at the core of our solution.

Onboarding PortCos to ESGⁱ is straightforward

- Undivided Ventures adds the PortCo to the platform, either from our seeded database of 2.5 million companies or manually creating a new company with the entry of three core data points.
- An investment theme is added to the PortCo Profile - which determines which metrics are presented to the PortCo when they register
- An invitation is sent to the PortCo to register

Low effort reporting for PortCos

- Simple and secure platform registration
- Assign read-only or write access for colleagues as needed
- Only the specific investment theme metrics are presented for completion - with the option to attach supporting evidence
- If the PortCo has multiple investors, they can all be invited to access the same data in ESGⁱ, reducing reporting effort
- The system defaults to the current reporting period, with both system and metric-specific help available
- Option to download into an excel template, amend data, and upload changes back into the platform

Low maintenance for Undivided

- Submitted PortCo data is published in real-time with a notification sent to confirm new data has been added. Fund level Dashboards are updated dynamically
- PortCo data can be requested and challenged via the platform - with the option for Undivided to input their own content if needed
- Historic metrics can be easily viewed alongside the current reporting period, with various filters for mandatory values, excluding or selecting blank fields

The Outcome

"ESGⁱ has been a great asset in setting up and implementing impact tracking and reporting for our Portfolio Companies. It provides us with a clear, consolidated view of our investments' impact, enabling more informed decision-making and transparent communication with our stakeholders."

"ESGⁱ's streamlined and integrated approach allows us to closely collaborate with our Portfolio Companies and provide them with the support they need the most to deliver on their business and impact objectives."

Find out how ESGⁱ can support Impact tracking and reporting for your Portfolio - connect@esgi.global

