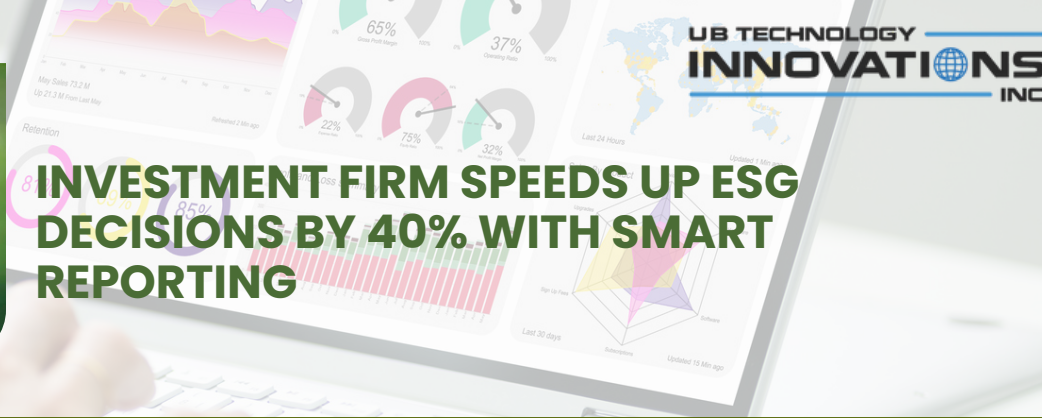




INVESTMENT FIRM SPEEDS UP ESG DECISIONS BY 40% WITH SMART REPORTING



A case of how smart scoring logic improved ESG transparency across all pillars individually.

WHO WE ARE

UB Technology Innovations is a leading provider of Power BI services, offering expertise in crafting exceptional dashboards. Our expertise assists clients in their digital transformation endeavors by streamlining the process and gaining a competitive advantage through rapid app deployment



THE CLIENT

The client is a global investment firm with over three decades of experience in credit-focused strategies across corporate, structured, and real estate markets. Known for its deep value and credit-intensive approach, the firm actively pursues complex investment opportunities through disciplined analysis and long-term partnerships. Backed by a diverse team of over 200 professionals worldwide, including 70+ investment specialists, the organization operates with a strong culture of learning, collaboration, and sound judgment, with a mission to deliver consistent value through strategic alignment and rigorous decision-making.



CHALLENGES

Environmental, Social, and Governance (ESG) reporting has become a priority for companies aiming to build trust with investors, meet compliance needs, and maintain long-term sustainability. ESG scores are now critical to investment decisions, pushing organizations to evaluate their operations beyond basic financial performance. Top-rated companies often achieve an AAA rating for their strong commitment across all three pillars.

However, the client had the following roadblocks in making this process efficient and reliable:

- There was no uniform scoring model to evaluate the E, S, and G pillars individually. Different teams assessed performance differently, leading to confusion and lack of comparability across issuers.
- Committee discussions and analyst evaluations were scattered across emails, spreadsheets, and meeting notes. This made it hard to trace past decisions or validate final ESG scores.
- Important financial indicators were evaluated without a structured assessment framework or clear audit trail.
- Investor queries took time to address because the team had to manually pull data from multiple sources, affecting turnaround time and transparency.

WHAT WE DO

- Streamlined data management process
- Cost-effective
- User interface
- Sustainability
- Scalability



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SOLUTION

To solve these challenges, we built a custom ESG Rating Application using a scalable and secure technology stack tailored for performance and usability as follows below:

- **Issuer ESG Ratings:** A scoring engine calculates ESG ratings using weighted algorithms for each ESG pillar separately, i.e., Environmental (E), Social (S), and Governance (G).
- **Investor Decision Support:** An investor-focused reporting module shows the ESG scores, key risk indicators, sustainability factors, and momentum trends (Positive/Neutral/Negative).
- **Committee Engagement Log:** A central repository records committee feedback, analyst observations, and meeting call logs for additional context and audit trail.
- **Key Drivers Assessment:** Assessment modules are segregated for each pillar individually like:
 - **Environmental:** Flood insurance availability, geographic risks, climate resilience.
 - **Social:** Borrower protections, credit reporting policies, transparency in lending terms.
 - **Governance:** Compliance with interest rate limits, customer grievance handling, appraisal review processes.
- **Data Processing and Scoring Logic:** ESG drivers are ranked in quartiles, and weighted scores are calculated based on performance. Final ESG ratings are generated automatically using clear, rule-based logic to ensure consistency and accuracy.

From a technical perspective, the application was designed using modern development tools and frameworks:

- **Frontend:** Built using Angular 15.2.10 and PrimeNG 15.4.0 for a rich and interactive UI. RxJS and BehaviorSubject handled state management across components, ensuring smooth data updates.
- **Backend:** .NET Core Web API powered the business logic and API integration. Company details and ESG data were securely stored in an MSSQL database, and Windows Authentication managed user access.
- **Deployment & DevOps:** Azure DevOps was used for CI/CD automation, with Git and TFS for version control and collaboration.



SOLUTION BENEFITS

- **Faster ESG Report Generation:** Automating ESG score calculations helped reduce the time required to prepare reports manually by 50–70% (approx.), freeing up resources for higher-value work.
- **Higher Accuracy in Ratings:** The scoring model improved rating accuracy by over 90%, reducing errors that used to slip through in manual reviews.
- **Quicker Investment Decisions:** Investors could make decisions 30–40% faster, as they now had immediate access to clear and structured ESG insights.
- **Reduced Operational Costs:** Around 20–35% of admin costs are reduced with reduced dependency on manual tracking and fragmented reporting tools.
- **Centralized Access to Evaluations:** All analyst reviews, committee feedback, and meeting records were logged in one system, making it easier to find past evaluations without delays.
- **Stronger Investor Confidence:** Standardized reports and transparent data increased investor confidence significantly, increasing trust in the company's sustainability performance.



Conclusion

The client gained a reliable and efficient ESG reporting system that supported faster and clearer investment decisions. From ESG score calculations to analyst evaluations, all critical financial indicators are now available in one platform. UB Technology Innovations, Inc. ensures tangible value for investors and asset managers through structured ESG scoring logic and simplified data retrieval, resulting in quicker due diligence and more confident capital allocation.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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