



# ESG & Impact Module

## Dynamo ESG & Impact is:

- **Flexible:** Works with existing frameworks and taxonomies to cross-map and tag datapoints
- **Configurable:** Whether your program is new or long-established, you can tailor Dynamo to meet your needs
- **Organized:** Our secure, cloud-based system keeps key data centralized so you can easily monitor the success of your initiatives

## End-to-End Cloud-Based Platform for Implementing, Facilitating, & Measuring Responsible Investing Programs

Gathering ESG and Impact data on portfolio companies can be difficult and time-consuming in an offline system. Manual surveys and diverse datasets present challenges with collection, standardization, and analysis of data.

Dynamo's ESG & Impact module is a suite of tools to help both General Partners (GPs) and Limited Partners (LPs) in three core areas: gathering data, onboarding managing companies, and calculating KPIs to evaluate fund and portfolio performance against targets.

### Dynamo In Action

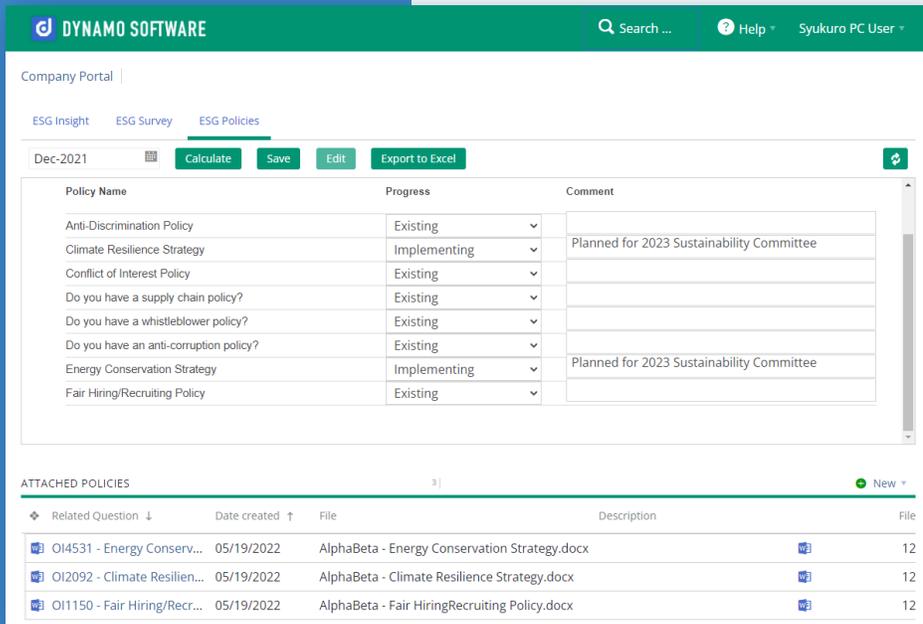
Whether you have a developed ESG or Impact program, or are just getting started with responsible investing, Dynamo has the tools you need to gather data, monitor KPIs, create action plans, and track your success. Build a library of data and documents over time that can be used to manage long term strategies, comply with regulatory requirements, and answer ad hoc requests for information. Our interactive dashboards track the success of ESG & Impact initiatives.

Period	Question ID	Question	Question description
12/01/2021 (11)			
12/01/2021	Q201	Independent Board Chair	Do you have an independent board chair?
12/01/2021	Q402	Total number of net new hires	New hires
12/01/2021	Q002	Sexual Harassment Policy	
12/01/2021	Q003	Data Privacy Policy	
12/01/2021	Q004	Are there initiatives to reduce energy usage?	Provide details
12/01/2021	Q024	Employee Code of Conduct Policy	
12/01/2021	Q025	Anti-Discrimination Policy	
12/01/2021	Q067	% of FTE employees with equity ownership	

## Surveys & More

Collaborate with portfolio companies using our dedicated company portal.

- Surveys
- Policy checklists
- Document library



## Workflows & Reminders

Create and follow a structured process for managing your ESG & Impact portfolio. With Dynamo, you can:

- Upload ESG KPIs as part of the financial statements workflow (when paired with PMV Monitoring module)

## Question Bank Content

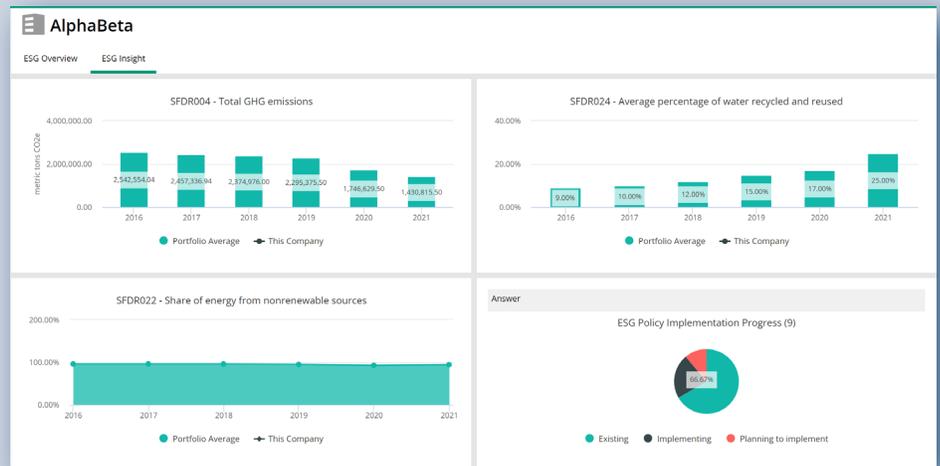
Dynamo's secure, searchable database and configurable question bank enables you to:

- Create a custom cross-mapped list of questions using our ESG Question Bank
- Use multiple taxonomies and frameworks, including:
  - SFDR PAIS
  - GIIN's IRIS Taxonomy
  - Data Convergence Project
  - GRESB for RE or Infrastructure

## Analyze & Report

Collect and visualize data for a deep understanding of your sustainability initiatives:

- Microsoft Excel® add-in to fill out information requests and third-party forms
- Microsoft Power BI® and chart-building plug-ins
- Cross-portfolio formulas, benchmarking, and data aggregation
- RESTful API
- Data Integration Framework to bring in data from your third-party benchmarks



## About Dynamo Software, Inc.

Dynamo Software's mission is to be the leading global, end-to-end cloud software platform for the alternatives ecosystem, serving the information sharing and analytical data needs of our constituents. Since 1998, the company has been providing industry-tailored, highly-configurable investment management, reporting and data management cloud software solutions to the global alternative investment industry. Dynamo's cloud-based solutions serve the private investment landscape including: private equity and venture capital funds, real estate investment firms, hedge funds, endowments, pensions, foundations, prime brokers, fund of funds, family offices, and fund administrators. The Dynamo™ platform has improved the productivity of fundraising, deal management, research management, investor servicing, portfolio management, and compliance teams worldwide. Dynamo has a global footprint with operations across the US, UK, Continental Europe, and Asia. For more information, please visit [www.DynamoSoftware.com](http://www.DynamoSoftware.com).

- Founded in 1998
- 1,000+ global clients
- \$10T client AUM



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