

Zephyr ESG Analysis

Powered by OWL Analytics

Zephyr 
Informa Financial Intelligence

Evaluate your investments through our new ESG Ratings, Scores, Percentiles & Rankings

Research, screen, report & monitor Mutual Funds, ETFs, SMAs & Equities on numerous ESG metric ratings, scores, percentiles & rankings.

ESG Analysis includes:

- ▶ Comprehensive screening to identify best-in-class funds.
- ▶ Peer comparisons across strategies on numerous ESG metrics.
- ▶ Portfolio reporting to demonstrate to clients the Environmental, Social, Governance responsibility of their investments.
- ▶ Acquire new clients by integrating sustainability and responsibility into your business.
- ▶ Enhance your story building and create ESG focused marketing materials.

ESG Analysis to complement a full suite of analytics and reporting tools...

Coupled with Zephyr's trendsetting Presentation Center, you can include the full suite of Zephyr ESG, analytics and reporting tools to:

- ▶ Create fully customized pages & reports or choose from our robust pre-defined analysis.
- ▶ Provide your clients with a comprehensive, yet easy to interpret report, that uncovers their adherence to responsible ESG investing.
- ▶ Combine the new Zephyr ESG analysis with our powerful analytics to build a complete investment portfolio story.

ESG Screen

Last modified 6 hours ago

Fields

Locate

➤ Morningstar Mutual Funds Information

➤ Performance

➤ Environmental-Social-Governance (ESG)

➤ Owl Rating (0-5)

➤ Board Effectiveness (Historical)

➤ Citizenship (Historical)

➤ Community & Charity (Historical)

➤ Compensation & Satisfaction (Historical)

➤ Disclosure & Accountability (Historical)

➤ Diversity & Rights (Historical)

➤ Education & Work Conditions (Historical)

➤ Employer (Historical)

➤ Environmental (Historical)

➤ Environmental Transparency (Historical)

➤ Environmental/Social Governance (Historical)

➤ Governance (Historical)

Columns

c1 Environmental/Social/ Governance Latest Available

c3 Citizenship Latest Available

c5 Employer Latest Available

c7 Human Rights Latest Available

c2 Environmental/Social/ Governance Latest Available

c4 Pollution Prevention Latest Available

c6 Diversity & Rights Latest Available

c8 Diversity & Rights Latest Available

c9 Management Ethics Latest Available

c10 Governance Latest Available

Filters

Environmental/Social/ Governance Latest Available is greater than 4

2753 22088 2753 22088

Environmental/Social/ Governance Latest Available is greater than 75

819 24022 819 24022

Citizenship Latest Available is greater than 4

1510 23331 819 24022

Pollution Prevention Latest Available is greater than 4

15025 9816 819 24022

Pollution Prevention Latest Available is greater than or equal to 5

15025 9816 819 24022

Results

Search


All Passed 679

FIRM	ASSET	ENVIRONMENTAL SOCIAL GOVERNANCE LATEST AVAILABLE	CITIZENSHIP LATEST AVAILABLE	EMPLOYER LATEST AVAILABLE	HUMAN RIGHTS LATEST AVAILABLE	ENVIRONMENTAL SOCIAL GOVERNANCE LATEST AVAILABLE	POLLUTION PREVENTION LATEST AVAILABLE	EMPLOY LATEST AVAI
● AdvisorOne Funds	AdvisorOne CLS Global Aggressive Eq N	5.00	5.00	5.00	5.00	75.70	90.76	
● AdvisorOne Funds	AdvisorOne CLS Global Aggressive Eq T	5.00	5.00	5.00	5.00	75.70	90.76	
● Astor	Astor Dynamic Allocation A	5.00	5.00	5.00	5.00	75.77	84.85	
● Astor	Astor Dynamic Allocation C	5.00	5.00	5.00	5.00	75.77	84.85	
● Astor	Astor Dynamic Allocation I	5.00	5.00	5.00	5.00	75.77	84.85	

Evaluate your investments through our new ESG Ratings, Scores, Percentiles & Rankings

ESG Scorecard:

ESG Scorecard - Catalyst Buffered Shield Fund I
As of Jan 2021

Total ESG Rating 
Total ESG Score 57.61

Environmental	Change m-o-m	Score	Social	Change m-o-m	Score	Governance	Change m-o-m	Score
Pollution Prevention	↑	60.00	Citizenship	↑	48.33	Board Effectiveness	↑	68.00
Environmental Transparency	↑	64.00	Community & Charity	↑	54.00	Management Ethics	↑	57.00
Resource Efficiency	↑	48.00	Human Rights	↑	53.00	Disclosure & Accountability	↑	60.00
		-	Sustainability Integration	↓	38.00			-
		-	Employer	↑	59.33			-
		-	Compensation & Satisfaction	↑	61.00			-
		-	Diversity & Rights	↑	59.00			-
		-	Education & Work Conditions	↑	58.00			-
Total	↑	57.33		↑	53.83		↑	61.67
Universe median	↑	53.00		↑	53.83		↓	45.33















Universe = Options-based Universe

ESG Snapshot:

Fund-ESG Snapshot-Catalyst Buffered Shield Fund I
As of January 2021

May 10, 2021 | 1/1

ESG Ratings


	CATALYST BUFFERED SHIELD FUND I
Total ESG	
Environmental	
Social	
Governance	
Pollution Prevention	
Environmental Transparency	
Resource Efficiency	
Citizenship	
Community & Charity	
Human Rights	
Sustainability Integration	
Employer	
Compensation & Satisfaction	
Diversity & Rights	

ESG KPI Scores - Catalyst Buffered Shield Fund I

- Pollution Prevention
- Environmental Transparency
- Resource Efficiency
- Community & Charity
- Human Rights
- Sustainability Integration
- Compensation & Satisfaction
- Diversity & Rights
- Education & Work Conditions
- Board Effectiveness
- Management Ethics
- Disclosure & Accountability



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		-	Sustainability Integration	↓	38.00			-
		-	Employer	↑	59.33			-
		-	Compensation & Satisfaction	↑	61.00			-
		-	Diversity & Rights	↑	59.00			-
		-	Education & Work Conditions	↑	58.00			-
Total	↑	57.33		↑	53.83		↑	61.67
Universe median	-	54.10		-	52.44		-	55.52

Universe = Mid-Cap Value Universe