

USER GUIDE

WELCOME TO THE ERIG INDEX ONLINE PORTAL

The ERIG Index is the Benchmark for Responsible Investment and the online portal is an analytics tool that allows you to build portfolios and compare funds with peers and against the asset class average.

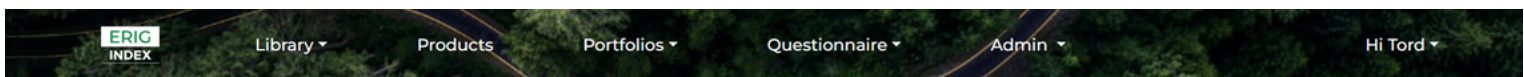
Getting started

Visit www.erigindex.com.au and login with your credentials.

Library

Find information relating to the ERIG Index, what Responsible Investment is, as well as a toolkit with information on methodology, ratings scale and a client RI questionnaire.

You can also find comprehensive and educational content from Fund Managers about Responsible Investment and trending themes.



An Introduction to ERIG Index

The ERIG Index provides Quartile Rankings for funds and assesses them across all seven capabilities on the RI Spectrum. [Click for more](#)

How is a Fund Graded?

The ERIG Index is based on a comprehensive questionnaire provided to Fund Managers. [Click for more](#)

The Role of Top-Down Analysis in Responsible Investment

Here is an easy read on the pros and cons of this top-down versus bottom-up analysis. [Click for more](#)

What is Responsible Investment

Here is a client friendly tool to use when explaining and educating your clients about Responsible Investment, enabling them to better understand how their beliefs can translate to investment selection. [Click for more](#)

Client Questionnaire: Responsible Investment Profile

This questionnaire aims to guide Financial Advisers and their clients in understanding their Responsible Investment beliefs. [Click for more](#)

Looking for Responsible Investment Model Portfolios?

Evergreen Responsible Growth Bond

Available through Generation Life

[Click here for more information](#)

Evergreen Ethical Investment Balanced Portfolio

Available through DASH

[Click here for more information](#)

These model portfolios can be viewed in your saved [portfolios](#)

Toolkit

Ratings Methodology

Ratings Scale

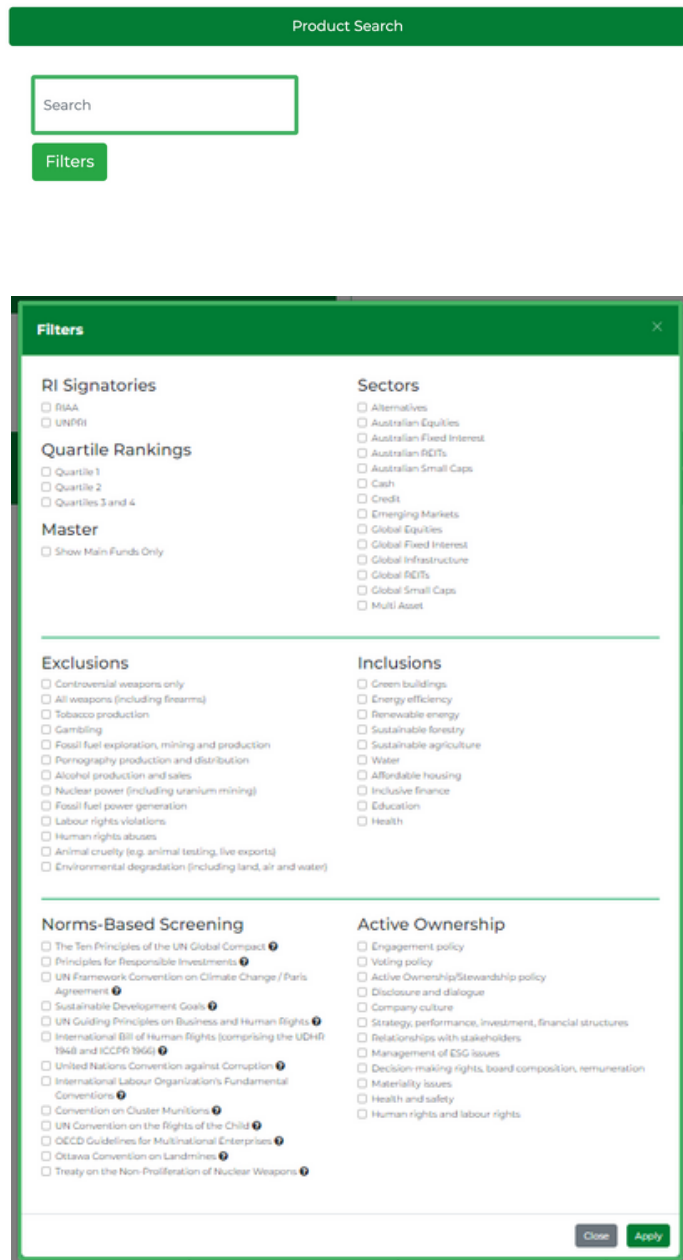
PRODUCT SEARCH AND PORTFOLIO CONSTRUCTION

Search for products by name or APIR code/ticker. You can use filters for more specific search results such as exclusions, inclusions and asset class.

Funds can be selected, sorted and compared.

All products have a score out of 10 for each Responsible Investment Spectrum capability, as well as an overarching Quartile ranking.

You can sort your search results using these metrics and also overlay a heat map for a visual representation of the scores.




The screenshot shows the search results table with the following data:

APIR Code/Ticker	Fund Name	Sector	Quartile	ESG Integration	Negative Screening	Norms-based Screening	Active Ownership	Positive Screening	Sustainability-themed Investments	Impact Investing
ETL0032A1	abrdn Sustainable Emerging Opportunities Fund	Emerging Markets	II	7	6.4	1.8	10	6.4	2	0
BEL7394A1	4D Emerging Markets Infrastructure Fund	Global Infrastructure	II	71	7.6	4.7	79	6.4	4.5	2
BEL0098A1	4D Global Infrastructure Fund	Global Infrastructure	II	71	7.6	4.7	79	6.4	4.5	2

Navigation elements include a 'Fund vs Asset Class Peers (coming soon)' search bar, a 'Green Map' toggle, a 'Create a portfolio' button, and pagination controls showing 'Previous', '1', '2', '3', '4', '5', '...', '280', 'Next'.

You can view more detail about a fund's RI capabilities by clicking on the APIR code.

Australian Ethical Emerging Companies Fund
AUG0026AU

Asset Class: Australian Small Caps 

	ESG Integration	Negative Screening	Norms-based Screening	Active Ownership	Positive Screening	Sustainability-themed Investments	Impact Investing
Fund	5.2	10.0	4.7	9.4	7.2	0.0	0.0
Sector Average	4.9	1.8	0.6	6.7	0.9	0.2	0.1

Exclusions

- Controversial weapons only
- All weapons (including firearms)
- Tobacco Production
- Gambling
- Fossil fuel exploration, mining and production
- Pornography production and distribution
- Alcohol production and sales
- Nuclear power (including uranium mining)
- Fossil fuel power generation
- Labour rights violations
- Human rights abuses
- Animal cruelty (e.g. animal testing, live exports)
- Environmental degradation (including land, air and water)

Inclusions

Active Ownership

- Engagement policy
- Voting policy
- Active Ownership/Stewardship policy
- Disclosure and dialogue
- Company culture
- Strategy, performance, investment, financial structures
- Relationships with stakeholders
- Management of ESG issues
- Decision-making rights, board composition, remuneration
- Materiality issues
- Health and safety
- Human rights and labour rights

Norms-Based Screening





- Principles for Responsible Investments
- UN Framework Convention on Climate Change / Paris Agreement
- UN Guiding Principles on Business and Human Rights
- International Bill of Human Rights (comprising the UDHR 1948 and ICCPR 1966)
- International Labour Organization's Fundamental Conventions

Once funds are selected, a portfolio can be created by selecting 'create portfolio', which then takes you to the Portfolio module.

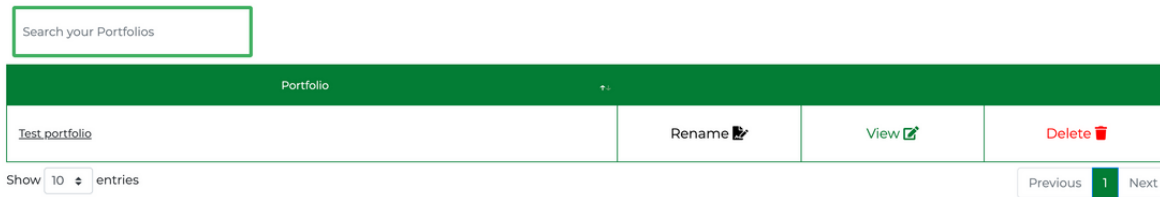
Product Search Product Comparison (Coming Soon)

Create a portfolio

Filters

APIR Code/Ticker	Fund Name	Sector	Quartile	ESG Integration	Negative Screening	Norms-based Screening	Active Ownership	Positive Screening	Sustainability-themed Investments	Impact Investing
<input checked="" type="checkbox"/> VAN0221AU	Vanguard Active Emerging Markets Fund	Emerging Markets		10	0	0	10	0	0	0
<input checked="" type="checkbox"/> IOF0127AU	Janus Henderson Diversified Credit Fund	Diversified Credit		9.3	5.9	2.6	9.1	6.4	8	0
<input checked="" type="checkbox"/> JH104	Janus Henderson Diversified Credit Fund	Diversified Credit		9.3	5.9	2.6	9.1	6.4	8	0
<input type="checkbox"/> ETL0172AU	MFS Concentrated Global Equity Trust	Global Equities		8.7	2	0	9.7	0	0	0

Portfolios can be edited, renamed and deleted using the 'manage portfolio' function.



Each asset class within a portfolio can be compared against their sector average in the Portfolio module.



Sector	ESG Integration		Negative Screening		Norms-based Screening		Active Ownership		Positive Screening		Sustainability-themed Investments		Impact Investing	
	Portfolio	Universe	Portfolio	Universe	Portfolio	Universe	Portfolio	Universe	Portfolio	Universe	Portfolio	Universe	Portfolio	Universe
Australian Small Caps	6.25	5.42	6.55	2.27	2.10	0.87	7.90	6.40	5.35	1.51	0.00	0.48	0.00	0.28
Global REITS	5.40	5.13	3.20	2.22	0.00	0.52	8.80	7.09	0.00	0.56	0.00	0.20	0.00	0.20

You can also add and remove funds, adjust weights, as well as search and sort within an existing portfolio. The heat map allows you to visually see how the Spectrum scores compare.

Once you've finalised your portfolio you can export using the 'download portfolio' button, this exports the portfolio into a CSV file.

Add or remove products from your portfolio Green Map

[Add funds to the portfolio](#) [Create a new portfolio](#) [Equalise Weights](#) [Save Portfolio](#) [Download Portfolio](#) [My Portfolios](#)

Portfolio No.1

Search within Portfolio

Portfolio No.1
(4 holdings)

APR Code/Ticker	Fund Name	Sector	Weight Total 100.00%	Quartile	ESG Integration	Negative Screening	Norms-based Screening	Active Ownership	Positive Screening	Sustainability-themed Investments	Impact Investing
ACM00001AU	AB Dynamic Global Fixed Income Fund	Global Fixed Interest	30	T	81	4	5.9	10	0	0	0
AMP0557AU	AMP Capital Corporate Bond Fund-Class A	Credit	20	T	6.7	6.8	4.7	9.1	0	2.5	0
AMP1179AU	AMP Capital Core Infrastructure Fund Class A	Global Infrastructure	25	T	6.2	5.2	5.3	9.4	0	5	0
AUG0002AU	Australian Ethical Australian Shares Fund	Australian Equities	25	T	5.2	10	4.7	9.4	7.2	0	0