



Environmental, Social & Governance on Intelligize®

Solidify ESG disclosure

YOUR CHALLENGE

As sustainability becomes ever more important to investors, customers, and employees, you, or your clients face challenges in keeping abreast of Environment, Social and Governance (ESG) developments, reporting ESG risks, and telling your ESG story.

Unlike other areas of disclosure which are handled primarily in filings to the SEC, for ESG you also need to satisfy shadow regulators who are demanding more information. At the same time, Corporate America is bracing for new climate regulation and reporting mandates. How can you get the information you need when it's scattered across multiple sources and varying document types?



"Intelligize is both intuitive and expansive, making it easy to find that one precedent you know is out there, or to identify the risk factor that is missing from an issuer's disclosure document. Other platforms we tried seemed to require on-going training or constant use in order to be utilized efficiently. Intelligize was clearly designed with the practitioner in mind."

**Senior Vice President
Fortune 500 Banking Company**

OUR SOLUTION

The Intelligize Environment, Social & Governance application does the heavy lifting, so you get unmatched precision and speed in researching ESG disclosures from peer companies – across disparate SEC Filings, ESG reports, news, and earnings call transcripts.

As a result, you can immediately see what ESG issues peers have identified as material to financial performance and what they are disclosing in an SEC Filing. Plus, you'll get visibility into the issues that are important to investors and other stakeholders that are covered in company ESG reports, but aren't currently viewed as material by the SEC.

Using our universal topic framework, powerful indexing engine and advanced search tools you can identify trends, research specific language, and establish what's market for ESG disclosures with a high degree of efficiency. So, you have more time to focus on disclosure strategy and optimizing what and how to disclose in the rapidly evolving ESG space.

PROFESSIONALS WE SERVE

- General Counsel
- Corporate Secretary
- Chief Accountant / Controller
- CFO / Treasurer, Filings Manager
- Head of Investor Relations
- Head of Competitive / Market Intelligence
- Chief Sustainability Officer
- Corporate Attorney
- Accounting Advisory Consultant
- Assurance Professional
- Information Pro / Librarian
- Other ESG professionals

WHY INTELLIGIZE?

Unmatched precision and speed in researching ESG-related disclosure.

Intelligize pulls together in one place and indexes a wide range of ESG related content across SEC Filings and related documents, earnings call transcripts, news and ESG reports from company websites.

You can use home screen analytics to drill down into a topic or disclosure trend, or use advanced search options like ESG topic, keyword, and content type. We've leveraged the deep expertise of our research team to develop a universal ESG topic framework, enabling content to be indexed in a way that makes searching intuitive and reliable. We also keep track of the ESG reporting standards (GRI, SASB, UN GC, UN SDG) used by individual companies, so you can focus your research on those companies who use the same framework as you.

Additionally, Intelligize indexes SEC Filings at both Section and subsection levels, and in earnings call transcripts, we break out the management statement and Q&A sections, so you can zero in on ESG language in specific parts of the type of document you want to search.

Stay ahead of upcoming developments and the latest disclosures in the ESG space.

Intelligize enables you to stay ahead of upcoming developments with a combination of ESG Topic Trends, quick access to the latest shareholder proposals and disclosure language from peers, insights into earnings, Q&A hot issues, and LexisNexis® ESG news.

Getting a handle on ESG issues that are material for your sector/company for inclusion in filings requires constant monitoring. For example, with the ESG Topic Trends tool in Intelligize, you can look at related Comment Letters to understand the topics that the SEC considers material for companies like yours, and what peers are disclosing related to those topics.

Quickly find the latest precedents in responding to ESG related shareholder proposals.

ESG-related shareholder proposals have reached new heights, but the nature of these proposals (e.g., diversity, human capital, political spending) can be new and unfamiliar. With Intelligize, you can search by ESG topic and keywords to find other companies' requests to exclude a shareholder proposal. In one solution, you can immediately see how the SEC responded, whether the request was subsequently withdrawn, board recommendations and the result of the vote at the shareholder meeting.

Make sure your statements on ESG progress are well researched and defensible to mitigate the risk of lawsuits.

There's been a rash of lawsuits relating to 'greenwashing' and 'woke-washing,' in which companies are alleged to be conveying a false or misleading impression of their ESG progress.

With Intelligize you can use advanced ESG topic, keyword, and document-type search capabilities to research precedent disclosure language quickly and comprehensively in both filings and separate ESG reports, to see what's market in each ESG area. You can also search earnings call transcripts to examine the types of ESG-related questions being asked and the answers executives have provided.

Accurately calibrate ESG in your financial disclosure.

Figuring out how ESG should be reflected in your Financials and the Footnotes is a huge challenge. With Intelligize, you can search Notes to Financials and MD&A (including using XBRL tags) to get a view on how your peers are making disclosures in relation to climate change and its impact on the financials.

Reduce the time it takes to gather a wide range of insights to inform your ESG Story.

With our 360° view of ESG-related information for an individual company and powerful peer group comparison views, you can surface insights on your peers and competitors effortlessly.

We bring together ESG intelligence from multiple sources, including SEC Filings, earnings call transcripts, company ESG reports and curated sustainability-related news. This deeply tagged content provides a wide range of filtering options means you can see quickly what peers are saying about ESG; for example, to understand their narrative around topics such as systemic financial risk related to climate change.

LEARN MORE

Discover the many benefits of the Accounting Standards & Guidance application on Intelligize with a free trial. Start yours today at: LexisNexis.ca/[Try-Intelligize](#)