



Engagement record

In Europe at least, it is now a legal obligation to demonstrate you have engaged with investee companies on ESG matters.

This is a quick demonstration of how to record ESG engagement with a company.

The screenshot displays the Integrum ESG web application. On the left is a sidebar with navigation links: Portfolio View, Profile Customisation, Screening & Reporting, and Scoring Logic. Below these are expandable sections for COMPANIES (3915) and COUNTRIES (183). The main content area shows a search bar at the top with the placeholder text 'Start typing a company, country or sector name...'. Below the search bar, the breadcrumb path 'Consumer Goods / Apparel, Accessories & Footwear' is visible, followed by the company name 'Nike' and the text 'Powered by INTEGRUM ESG'. A 'Profiles' dropdown menu is set to 'Core strategy'. The 'Engagement' section is highlighted, showing a message: 'There are no engagements recorded for Nike.' Below this, there are three input fields: 'Engaged on ESG' with a dropdown menu showing 'Select an option', 'When did you engage?' with a date picker set to '21 / 3 / 2022', and 'In-house summary' with a text area containing the placeholder 'Summarise this company's risk'. A 'Save Engagement' button is located at the bottom right of the form.

First, go to the page of the company for which you want to log an engagement. In this example, we've chosen Nike.

Engagement

There are no engagements recorded for Nike.

 INTEGRUM ESG

Engaged on ESG

Select an option

Yes - written

Yes - verbal

Pending

No

isk

Save Engagement

At the top of the page, select the type of engagement from the drop-down menu, input the date and then add your comment.

Engaged on ESG

Yes - written

When did you engage?

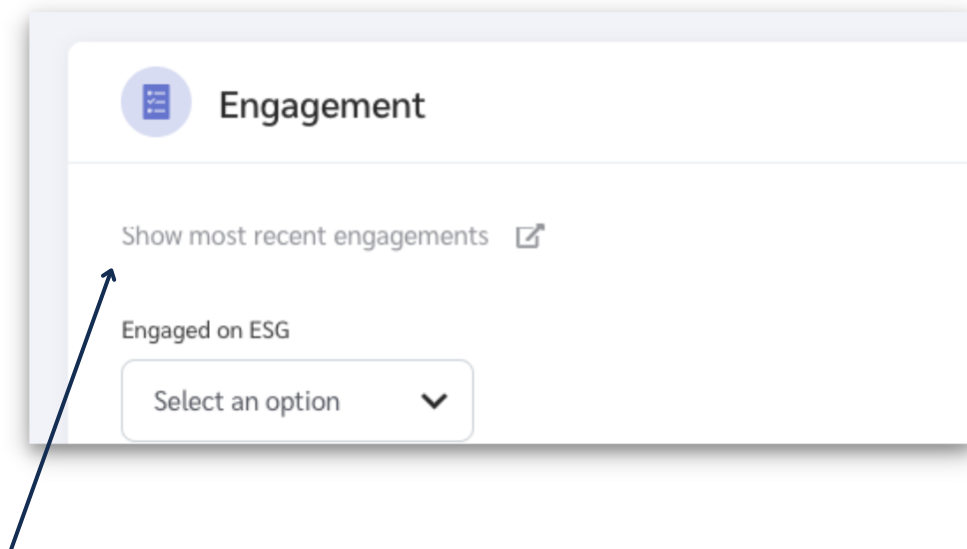
21 / 3 / 2022

In-house summary

We emailed IR for a clearer statement on their whistleblower policy.

Save Engagement

Don't forget to click 'Save Engagement'.



You can click on 'show most recent engagement' to view the history of engagement with that company.

It is also possible to view engagements on the portfolio view if you scroll to the bottom of the page.

Engagement	
Have we engaged with the company regarding these ESG risks?	● Yes - verbal
Further Comments	Spoke to IR on the phone to discuss recent revision to Diversity policy, See More

If you have any questions, just email contact@integrumesg.com.