

	TARGETING OF CUSTOMER MARKET	ABILITY TO SEND DATA SURVEYS DIRECTLY FROM PLATFORM	CAPACITY TO MANIPULATE DATA FOR ANALYSIS WITHIN PLATFORM	DATA VISUALIZATION AND GRAPHING CAPABILITIES	INTEGRATION WITH INDUSTRY FRAMEWORKS AND ADOPTED NORMS	BENCHMARKING OF DATA AGAINST EXTERNAL COMPS AND ACROSS PORTFOLIO	DIFFERENTIATED FUNCTIONALITY
	Fund managers with portfolios that include private investments.	Platform sends requests to reporting entities/ portfolio companies, with configurable automated reminders.	In-platform data editing and analysis, with custom formula creation.	Customizable dashboards with user-defined tables and charts (includes forecasting).	Integrated SDGs, IRIS+, and user-defined metrics or tags can accommodate any framework.	Impact and financial performance can be compared across portfolio companies.	Flexible data collection options: standardization of Excel uploads, manual data input, and/or document uploads (for qualitative reporting).
	Startup founders (seed through series D), impact accelerators, and impact funds.	Surveys collect primary impact data from beneficiaries. Founders can integrate real-time sales and revenue data, then generate automated impact performance analytics.	For founders: interactivity between impact and financial data. For funds and accelerators: ability to view analytics by SDG, geography, stage, metric, etc.	Automated and interactive data visualization, customized dashboards, and validated reporting.	IRIS+, SDGs, and IMP.	Benchmarking across all companies in iX platform and internal benchmarking within funds, portfolios, and cohorts.	Impact analytics fully integrate with company and fund financials; includes impact valuation and impact multiples of revenue and capital; enables comparability and automated impact tracking.
	Private market investors (PE, real assets, private credit).	Platform allows unlimited surveys from companies.	Customizable across any metrics or grouping (i.e., companies, fund, GP, portfolio).	Seamlessly works with any data visualization or graphing tools (QuickSight, Tableau, etc.).	Integrated metrics from SASB, GRI, GHG protocol, WRI, or any standard requested to be uploaded.	Benchmarking to public comps, with private comp quartiles when sufficient comps available.	Integrated carbon calculator, data approval feature, and integrated chat for communication.
	Institutional investors, banks, asset, wealth and private equity managers, ETF issuers.	Private Equity surveys are adapted to companies' activities and therefore go through double materiality tool before sending.	Reports (both at the company and portfolio levels) are customizable because of an integrated BI software.	Customizable thematic modules allow for environmental and social data contextualization. Integrated BI software allows for advanced data visualization.	Methodology is based on international standards including the IMP and SDGs. Other standards include SASB and GRI for materiality, IRIS+ for indicators, etc.	impak Analytics platform and integrated BI software allows for easy benchmarking of any piece of data against peers and across portfolio.	360 impact assessment with negative and positive impacts, using the IMP and SDG standards, combining technology and human expertise.
	Five key verticals: investment funds (GPs and LPs), foundations, nonprofits, government agencies, and businesses.	Sending surveys (via email) is in IRR process patent and product pipeline; but as a SaaS platform, users currently enter data within application environment.	Customizable data manipulations across projects, investments, or companies, including by impact types, impact metrics, impact ranges, and key impact indicators.	Customized dashboards are in product pipeline. Currently, user data displays via widgets and tables, and detailed visualizations are generated outside of the SaaS environment.	IRR is customizable to comply with any framework or database; currently sources from IRIS, UN SDGs, LISC, USIA, IGS, ULI, ESG, and others.	Internal benchmarking across projects, investments, or companies.	The only platform incorporating comprehensive inputs and structured data entry for consistently analyzing any type of impact created by any type of organization.
	Venture capital and private equity firms, private companies.	GPs can customize the frequency and framework for data collection. Portfolio companies can use the online platform to share data.	Dataset can be manipulated by fund, year, industry, company, or KPI, and then downloaded.	Interactive dashboards show fund and company performance, trends over time, benchmarks, and financial impact.	Customizable framework can be aligned with UN SDGs, GHG Protocol, SASB, GRI, and TCFD. IRIS+ can be mapped.	External public and private market comps; internal fund and portfolio company comps for GPs.	Platform functionality for portfolio companies - GHG measurement, DEI survey, and improvement recommendations.
	Investors in public markets that care about their social and environmental impacts.	Company data is extracted directly from public disclosure with full click-to-source transparency.	It is possible to do complete data exports for companies and portfolios, with historical data from 2017.	The platform offers instant SDG portfolio reporting and ability to benchmark versus index and goal.	Mapping to all frameworks: including SDGs, IRIS+, GRI, EU SFDR, and the IMP.	SDG benchmarking functionality against index, sector, region, and more.	Click-to-source transparency on each data point; proprietary tool for estimations of impact from products and services.
	GPs in the private market, venture capital, and private credit in the private credit market.	Clients create and send custom frameworks to portfolio companies. Portfolio companies are "nugged" on platform to comply, saving time and emails.	Analytics module provides visibility at the fund, portfolio company, and metric level.	Dynamic dashboards and exportable smart graphs and figures available in multiple formats.	ESG Data Convergence Initiative, SFDR, ILPA DEI DDQ, and Novata emerging metrics, which include the most widely used custom metrics from Novata clients.	Partnership with S&P Global provides public sector comps while Novata's benchmarking uses anonymized data from clients in the Novata ecosystem to provide private company benchmarks.	Choose the right metrics for you. Deep subject matter expertise supports step-by-step guidance so that portfolio companies provide accurate data. Insightful analytics and reporting.
	GPs and founders in private markets.	Surveys can be sent through SMS, WhatsApp, or email via the platform. It is also possible to integrate directly into systems currently housing impact data for real-time, automated data feeds.	Data can be analyzed by fund or company as well as any indicator relevant to the client (i.e., by metric, framework, geography, investment size).	Completely customizable dashboards that can be public or private facing.	SDG, SDG Impact Standards, IRIS+, SASB, IMP, IFC, PRI, and GRI.	Benchmarks available by impact sector.	End-to-end impact measurement platform; digitization of IMM processes and performance data; verification and validation.
	Investors: GPs and LPs. Enterprises: private and public firms providing ESG information to their customers, investors, and regulators.	Surveys can be sent through multiple submission portals (email, text, online) on flexible time frame. Also possible for survey recipient to distribute within divisions, subsidiaries, or facilities within platform.	Customizable data manipulations across funds, sectors, asset class, indicators, companies, and more.	Easily customized dashboards and formatted reporting to multiple data destinations.	GRI, DJSI, CDP, SASB, TCFD, and others are supported out of the box. New frameworks can be added based on customer needs. Templates available for customization.	Initial product release will provide internal benchmarking across funds and portfolio companies. External benchmarking is under development.	Flexible workflows, end-to-end integration (eliminating or minimizing manual entry with automated entries from APIs, files, etc.), audit trails, data validation, and data security.
	GPs and LPs in private markets across all asset classes. Also used by corporates.	Surveys can be sent directly to portfolio companies. Data completion and progress can be tracked, and reminders sent using messaging tools.	Data manipulation and consolidation by asset class, fund, indicator type. Possible to create tags on indicators, perform year-over-year comparisons, track progress vs. targets.	Robust, off-the-shelf tools for creating dashboards, widgets, tables, and graphs. Customized reports that can be exported as PDF or PPT designed to client specifications.	Adaptable to any established industry framework and also can develop custom frameworks to include industry-specific or company-specific KPIs.	Internal benchmarking across funds and portfolio companies. Any external benchmark can be embedded or called by API. Global industry benchmarks to be added in 2022.	Frameworks and reporting capabilities can be customized to client's context and needs. Multiple methods of calculating carbon footprint of investments. API and Excel integration.
	GPs in private markets with focus on VC and PE firms, LPs, public markets, and wealth managers. Also, OEM solutions for sustainable investing platforms.	Users can build and send surveys using SAMETRICA Data Collector. Surveys can be sent via email, PDF, or directly from platform and customized by portfolio companies.	Users can connect directly to data in the Data Collector, write out indicator calculations, and combine data across the platform.	Users can create fully customizable dashboards with built-in BI tool, connect to in-house BI layer (i.e., Tableau, PowerBI), or choose pre-existing frameworks.	Standard agnostic platform. Options include IRIS+, UN SDG, GHG Protocols, PCAF, SFDR, and vetted and tested impact frameworks of other SAMETRICA customers.	Benchmarking across public sector, private sector, and internal holdings (funds and portfolio companies).	ESGenius onboarded new customers and portfolio companies in under an hour using AI. Integrates with over 10,000 apps to streamline data collection.
	Corporates, asset owners, managers, and large to midsize social purpose organizations.	Surveys can be sent online or offline; through WhatsApp, Twilio. In-built surveys or integration with popular survey mechanisms (SurveyMonkey, Google Forms, type forms, JotForm, Microsoft).	Semantic layer allows alignment with the IMP, scoring (like 2X Challenge Indicators), complex formula calculations.	Dedicated data store, unlimited dashboards with advanced permissions. Large number of visualizations, mapping, and storytelling are possible. Designed for fund managers and 360 views of enterprises.	Collaborative impact strategy builder based on IMP and Theory of Change that integrates 4000+ impact metrics, 50+ impact standards, and custom metrics.	Semantic engine allows for tracking internal outcomes and external benchmarking.	Allows fast integration with common data store, allowing to keep data at the location. 140+ real-time, built-in integrations allow continuous learning for maximizing impact.
	Portfolio companies, GPs, and LPs in the private market.	Fully customizable surveys and platform-inclusive system uploads.	Advanced analytical capacity with incredible granularity, including time-series analysis.	Built in full-fledged BI tool that is both intuitive and flexible.	Framework-agnostic platform allows for reporting across all standards. Build a custom impact thesis or borrow from an existing framework.	Benchmark by location, industry, and 4 years of benchmark data across companies.	End-to-end platform for IMM. Extraction of quality systems-level data (HRIS, supply chain, energy, accounting, etc.). Verified and triangulated data.
	Impact organizations (thematic impact funds and investors), portfolio companies, foundations, and nonprofits.	Integrated and customizable survey tool with optional templates. Manual data upload capability and platform integrations (including Salesforce, SurveyMonkey, and Google Sheets) to streamline data collection.	In-platform ability to merge and edit data tables, create value maps, perform calculations, and implement weighted scorecards. Filterable dashboards enable analysis across multiple factors and criteria.	User-friendly dashboard design that synchronizes multiple datasets, including qualitative data, and provides a menu of visualization and external sharing options, including embedding in a website.	Ability to integrate any accessible external or industry framework with customizable templates and embedded SDGs included in goals tracking.	Compatible with any external benchmark data set; internal benchmarking capability across funds, sectors, programs, and themes.	Quantitative and qualitative data collection tools from multiple sources, access to public data sets and easy-to-use data visualization tools.