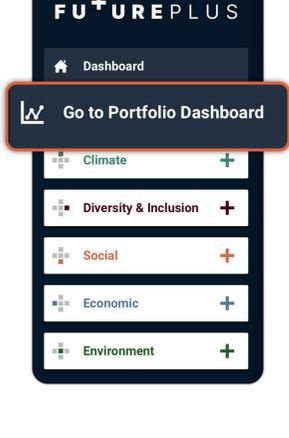


GETTING STARTED

FuturePlus Portfolio Dashboard

Providing the tools you need to accurately report on the sustainability progress of the portfolios you manage or have invested in, and the Environmental, Social and Governance performance and projections of the organisations in your portfolios.



1. YOUR DASHBOARD

Log in to the FuturePlus platform and click on 'Go to Portfolio Dashboard' in the left-hand menu. This will take you to the homepage of the Portfolio Dashboard.

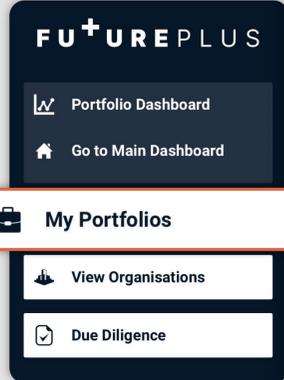


NOTE: Your Portfolio Dashboard subscription gives you access to the full FuturePlus Dashboard and assessment, providing you with the opportunity to access your own dynamic ESG score showing actual and ambition ratings. For instructions on how to use the Main Dashboard, please ask for our 'How To' Guide for Organisations. You can switch between the Main Dashboard and the Portfolio Dashboard at any time by using the buttons on the left-hand menu.

2. MANAGING PORTFOLIOS

To get started, click the 'My Portfolios' button in the left-hand menu. Here you can view all of your individual portfolios and create new ones. To create a new portfolio, click on the '+Portfolio' button. There is no limit to the number of portfolios you can create.

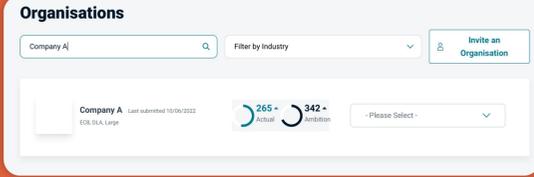
You can invite companies to join a portfolio by visiting the 'Organisations' page, accessed via the left-hand menu, or clicking on the 'Add Organisation' button within each portfolio. Companies will be alerted to your invitation via email.



NOTE: Organisations not already using the FuturePlus platform will be charged based on the number of employees (FTE). For the purchase of a number of licenses, please contact us as pricing may be negotiable. If you are inviting an organisation already using the platform, be sure to invite the company's Admin User, who will have the authorisation to accept your invitation.

3. ORGANISATIONS

Once an organisation has accepted your invitation to join the platform you will receive a notification via email and the organisation's name will appear on the 'Organisations' page. You can assign organisations to a portfolio by using the drop-down menu to the right of each organisation's name on the 'Organisations' page. Organisations can be added to one or multiple portfolios which allows you to understand the data within your portfolios based on portfolio, geography, sector or product.

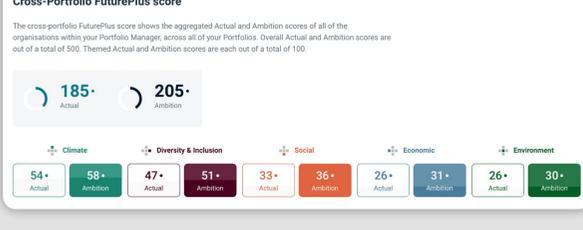


NOTE: To view information about individual organisations, click on the name of the organisation you wish to view on the 'Organisations' page. Once an organisation has completed their FuturePlus assessment and started working on their sustainability ambitions, you will be able to view their FuturePlus Scores, previous submission data, and sustainability Roadmap, which can be easily filtered by time frame and theme, or downloaded as a CSV file. CSV files can be easily uploaded to project management software, such as Asana, AirTable and ClickUp.

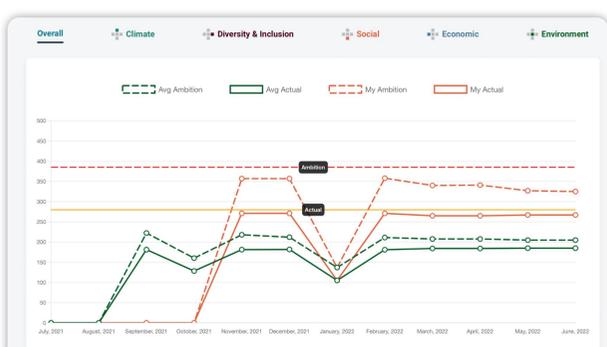
4. PORTFOLIO DATA

Once you start adding organisations to your portfolios, your Dashboard will be automatically populated with data reflecting the environmental, social and governance performance and projections of your aggregated portfolios.

The cross-portfolio FuturePlus score shows the aggregated Actual and Ambition scores of all of the organisations within your Portfolio Dashboard, across all of your portfolios.



NOTE: Overall Actual and Ambition scores are out of a total of 500. Themed Actual and Ambition scores are each out of a total of 100.



5. ESG

The ESG progress of your portfolios can be viewed in the graphs on the Dashboard. There is a separate graph for each of the five themes that make up the FuturePlus assessment: Climate, Diversity & Inclusion, Social, Economic and Environment, and a sixth graph showing the overall progress.



NOTE: You can set benchmarks for each of the themes by clicking on each graph and selecting 'Set Benchmark'. The platform also provides cross-portfolio benchmarks highlighting the organisations with the highest Actual score, the highest Ambition score, and the highest Delta of all of the organisations within your Portfolio Manager, across all of your portfolios.

6. REPORTS

Your subscription to the Portfolio Dashboard includes access to downloadable sustainability reports for portfolios and individual organisations, providing instant and invaluable ESG insights to investors and the financial markets in a way they can measure and value.

Your cross-portfolio report can be accessed via the Dashboard homepage. The report shows the aggregated ESG data across all of the portfolios on your Dashboard. It can be used to assess the overall sustainability impact of your investments, including the aggregated scores across your portfolios, as well as summaries of individual portfolios.



NOTE: Downloadable reports for individual portfolios and organisations can be accessed within each portfolio and organisation page.

7. DUE DILIGENCE

Your Portfolio subscription gives you access to the FuturePlus Due Diligence service, which provides an automated and verified Due Diligence solution for Portfolio Managers looking at the sustainability risks of potential portfolio companies.

To get started, click on the 'Due Diligence' button in the left-hand menu and invite an organisation to begin their assessment by clicking the 'Invite Organisation' button.



NOTE: Due Diligence credits can be purchased in bundles via your Billing & Subscription page. Each credit allows you to invite one organisation to complete the Due Diligence questionnaire.

The questionnaire covers the five themes of Environment, Climate, Social, Economic, and Diversity & Inclusion, and is assessed and verified by a member of the FuturePlus team. Verified Due Diligence reports will be automatically added to your Dashboard and are valid for 90 days. You will also receive an email notification once an assessment has been verified.

	Yes	No	AMBITION				
			3 months	6 months	12 months	18 months	3 years
Does your organisation monitor, record, and report its energy usage and scope 1 & 2 greenhouse gas emissions?		+			+		
Does your organisation consider, promote, and support economic inclusion when selecting suppliers?	+						
Does your organisation have a written procedure for handling HR issues linked to harassment and inappropriate behaviour, including a formal whistle blowing policy linked to the board?		+			+		
Has your organisation been prosecuted and found guilty of employment, environmental, corruption, registration or any other criminal act in the past 6 years?		+					
Where appropriate, do you ensure that vegetarian, vegan, low carbon, culturally appropriate, and ethical food options are offered to your staff or customers?	+						