



February 2020 | Newsletter

Keeping you up to date with all the latest news from The S Factor Co.

We put The S in ESG™

Greetings!

Ramping up to launch!

It's been a whirlwind start to the year, and it doesn't seem to be slowing down anytime soon. There's no stopping us now!

We are working hard to put the final touches on our fully-customized S-Factor product in time for launch, next month. We will be hosting webinars on theory, methods, onboarding clients, and updating our investment community in a few weeks.

Stay tuned for news, events, and more announcements in the coming weeks.

You can visit us on LinkedIn and our website news page for the most current information and we will endeavour to keep you posted via these campaign emails.

We thank you for your continued support and we look forward to your feedback on the S-Factor analytics.

First, some exciting news...



The Sustainability Accounting Standards Board (SASB)

Early February, the S-Factor became an "official" member and certified SASB product. We have been using the SASB non-financial metrics in ESG, by sector, for years, as 1 of our 45 benchmark frameworks on best practices and as complimentary performance metrics in our methodology. You can read more about [the SASB framework here](#).



ESG Advocate of the Year!



Exciting News! We are very delighted to announce that on February 6th, 2020, we took home the prize for **ESG Advocate of the Year** at the Private Asset Management Awards (PAM) ceremony on Park Ave, in New York City. We were honoured to be listed among some incredible colleagues in the industry for this recognition. [Read more about the PAM Awards and 2020 winners!](#)



S-Factor joins CAASA as its #200 member.

The Canadian Association of Alternative Strategies & Assets was formed to bring together alternative investment managers and investors, along with service providers, in a setting conducive to information sharing, discussion and networking, and collaborative initiatives. This is a fantastic new chapter and decade ahead for our team, as we take decades of 'boots on the ground' experience and turn it into the most unique methods, data sets and market signals to help the broader regulatory and investment industry leaders assess how companies perform in critical areas of social responsibility.

[Visit CAASA here.](#)



TEDx UofT

Dimensions: The Impact of Math.

On February 13th, 2020 our CEO gave a TEDx talk at the Fields Institute (CQAM), for Research in Mathematical Sciences.

At the salon, themed "Dimensions," she introduced the S-Factor quantitative model. Stay tuned for news of the production release, anticipated for late March!



[Check back here.](#)

Where can you find us next?

BrightTALK
Webinar

Join us, March 11th for a presentation on **The Impact of Math: The Social Dimension**. The presentation is a deep dive into the Social Factors™ or the “S in ESG™” and its **power of influence and performance** in the realm of ESG considerations.

[Register here.](#)



Talking Hedge: Customization is Key (Panel)

Santa Monica, CA
March 25-26th, 2020

Alternative investment managers and solutions providers **increasingly construct unique portfolios** for institutional asset owners and establish well-defined **alignment of interests**.



Our CEO will be discussing **the tailoring of solutions** for investors results in lower costs, operational efficiencies, and **alpha generation** on a panel during this event.

Talking Hedge will bring together institutional investors with alternative asset managers and solution providers (platforms/FoFs) for substantive discussions about **strategic investments** and structures that provide **diversification** and **risk mitigation** for institutional portfolios.

[Register here.](#)



Generating Alpha

New York, NY
April 8th, 2020



Companies have begun to implement ESG practices to reshape how they **create value**. This value manifests itself through returns in the equity selection process, as valuation models emerge to demonstrate those returns for institutional investors who seek out companies with strong ESG practices and ratings.

The **2020 program** will address **top-line issues** in the ways that allocators select investments through fund managers and through the advice of

investment consultants.

Full-day discussion will include information on financial evaluations, portfolio allocations and how investment experts create portfolios using ESG factors as core drivers of value. The program will also address benchmarking (using indexes and other vehicles) to manage risk, volatility and other considerations facing institutional investors today.

[Register here.](#)

Product Update

CLIENT FAQs

We have been flooded with **FAQs** recently, in ramp up to our launch. We've decided to share a few Q&A's with you here, each month.



[Register for your trial now](#)

Q. How many companies does the S-Factor cover?

A. We have about 42,500 companies in our database (almost all publicly-listed equities); they will have various levels of “S” scoring in our initial product launch in March, with our early focus on large and mid-caps.

Q. Which asset classes or industries does the S-Factor data set cover?

A. We are focused on publicly-listed equities in all major industries.

Q. Where is your coverage focused (geographically)? What are the start dates of the different regions?

A. We cover global equities; all companies in all regions will have the same time-series coverage.

Q. How much history does the S-Factor have?

A. We will have a minimum of five years of historic ratings in the March product launch, which will facilitate trend analysis and back-testing of the data.

Q. Is your data point-in-time?

A. Yes, the S-Factor’s data is point-in-time, with discrete events or social risks that affect a company’s score captured in time-series. The product will be launched with five years of historical time-series data, with go-forward scoring maintained at point of event/report.

Q. What is the cross section of the dataset (continuous or discrete)?

A. The S-Factor data is continuous and can be customized to specific needs.

If you have other questions about our product, contact us below with the subject **FAQ.**



Scale & Breadth of Coverage

As we ramp up for our 'early access' launch in March 2020, registered clients will be given access to thousands of companies and historical data for backtesting the model.



Upon release, a comprehensive methodology guide, more substantial sample data and an updated dictionary will be made available.

Stay tuned for a more specific release and performance fact sheet information!

Product Tours are open! Do not miss out!

Team



2020 is slated for substantial growth as we launch our data product and continue to grow to serve the demand for quality content, information validation and creative use cases.

Current open positions:

- Vice President, Sales - North America
- Operations Manager - Toronto
- Marketing Assistant/Manager - Toronto

CAREERS @
The S Factor Co.

Many new openings to come in the next month!
Learn more here - [Careers](#)

Industry Highlights



In case you missed it...

[McKinsey & Company: The ESG Premium: New perspectives on value and performance.](#)

[Bank of America: ESG Matters - US - 10 reasons you should care about ESG.](#)

[Bloomberg: Quants Say They Can Make Investing More Sustainable.](#)

[CommDEV - IFC: Unlocking Data Innovation for Social License in Natural Resources.](#)

[Visual Capitalist: Visualizing the Global Rise of Sustainable Investing](#)

[Financial Times: The ESG Revolution is widening gaps between winners and losers.](#)

[GIIN: The State of Impact Measurement and Management Practice, Second Edition.](#)

[Fortune: Responsible investing is a rare field of finance led by women. Now it's hot - and men want in.](#)

[Forbes: A Next Gen Investor's Predictions On Impact Investing In 2020s.](#)

[Morningstar: ESG Investing Comes of Age](#)

Get in Touch

We look forward to helping the market solve some seriously complex social impact challenges, fulfilling the gaps in information, benchmarking international norms, content validation and providing material evidence you can count on.

Sincerely,

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