

SUSTAINABILITY SPECTRUM™

Zeo Capital Advisors conducts deep fundamental credit research on corporate debt, including measuring a company along a proprietary Sustainability Spectrum™. The Sustainability Spectrum™ shifts the focus beyond traditional environmental, social and governance (ESG) factors to intentionality, proactivity and progress.

Sustainability Spectrum™



Using Capital to Reward Company Progress

Demonstrate awareness of environmental, social and governance issues most impactful to the industry or business

Evidence of a clear strategy to address sustainability issues from a competitive, financial materiality and an evolutionary perspective

Must show meaningful strides towards improvements in sustainability best practices

Determine how to measure efforts and defining what success means over what time period



TRUVALUE LABS

Bloomberg SUSTAINALYTICS

ROBECOSAM

ISS

CDP

- Populate and track findings in proprietary Green Slate™ software
- Active focus on E, S and G
- Utilize Truvalue Labs SASB-aligned factor-based data
- Other references: Bloomberg, Sustainalytics, RobecoSAM, ISS and Carbon Disclosure Project
- Automated Green Slate™ score output

The stages of the Sustainability Spectrum™ are: Awareness, Strategy, Execution and Measurement. Using the Sustainability Spectrum™ identifies credit issuers who demonstrate awareness of environmental, social and governance (ESG) issues; show evidence of a clear strategy to address sustainability issues; are taking meaningful strides towards improvements in sustainability practices; and can define success over a specified time period.

Our repeatable approach to credit investing means every holding is proactively selected to meet our fundamental standards, which includes sustainable business practices.