



## Driving responsible and sustainable investing by using ESG information.

Helping investors to evaluate companies' environmental, social, and governance practices and make more informed investment decisions

StaSASTicians achieved this using

• SAS® Viya®: Data access (SAS® Drive), data preparation (SAS® DataStudio and SAS® Studio) • Visualization & reporting (SAS® Visual Analytics) • Statistics • Open source integration (SAS® HUB, Python) • Optimization • APIs (yfinance/Yahoo Finance)

SAS Hackathon 2023 • Industry Winner in Insurance • Insurance Track

## Challenge

Investors need a way to make judgements before investing. Financial information is useful, but it does not tell the whole story.

- Investors need a way to make a more informed decision.
- Information about environmental, social and governance (ESG) factors may be a good way to evaluate companies before investing.
- Better information can lead to more informed decisions, and more sustainable and responsible investment.

## Innovation

This solution uses SAS® Viya® and open source technology coupled with APIs and visualization technology to create a dashboard to support investment decisions.

StaSASTicians:

- Created a way for potential investors to analyze and view information about funds' and companies' ESG performance.
- The dashboard incorporates risk preference and ESG information to recommend the most profitable, sustainable, and responsible portfolio for each individual.
- It is designed for young people to use when working with a trusted adviser.

## Impact

The dashboard will allow young people to obtain the information that they want to support their decision-making about investment and insurance plan decisions.

- The dashboard provides additional information to support the work of a trusted financial adviser.
- It is designed to help young people understand better what might affect their decisions.
- This approach could be widely used in investment within a few years, across all age groups.

“Create your optimal insurance plan, invest confidently and make the world better.”

Narges Hosseinzadeh • Team lead • StaSASTicians