

## Segment-specific demos

Hi, my name is Maxi Heidenblut, Head of ESG & Climate Products for the Americas at MSCI. Welcome to Private Company Data Connect.

MSCI Private Company Data Connect is a solution that supports private and public companies' sustainability and climate disclosures.

Co-designed with the world's leading private credit and equity investors, the platform provides investors with access to disclosures, such as the ESG Integrated Disclosure Project, and simplifies a company's disclosure journey.

I will now walk you through the key functionalities of the platform. Let's get started.

On the homepage, you have access to various actions that enable you to seamlessly access, share and upload data within our integrated cloud-based platform.

Under the first column, you can onboard new companies to MSCI ONE as well as manage your existing companies' disclosures all in one place.

The second column allows you to upload a disclosure and enter data on behalf of your portfolio companies within our secure interface. If you already have an existing excel template you wish to upload, you can do so by clicking on the upload excel file button.

To search through our database of companies, the request access column can help you see who is already using the platform.

Lastly, our Knowledge Hub brings together resources to help you navigate the platform and submission process as well as research and an overview of our suite of solutions.

Let's start with the Manage Company dashboard.

By clicking on this button, you can view the list of your companies as well as onboard new companies onto MSCI ONE.

Here you can see your list of companies, and that the permission status.

When you click on the disclosure icon, the disclosure history of the company will appear here.

Now, if you want to onboard a new company, you can also do that from the Manage Companies page by clicking the folder icon in the righthand corner.

That will take you to the Onboard Companies page. To onboard a single company, or multiple companies at once, you can download the excel template and fill it in with the company name, identifiers, contacts, and other information.

The red boxes in the excel template indicate the mandatory fields. Once filled out, please upload your completed excel template here.

You can check the Manage Companies tab for a status update to view the requested companies once they are onboarded.

Going back to the homepage, if you wish to enter data on behalf of a portfolio company, you can do so conveniently through MSCI ONE.

If your portfolio company chooses to not disclose themselves, you have two options to upload their data. You can use our seamless online ESG IDP template or download the disclosure template via excel and upload it back to the platform.

Any data that the GP uploads will remain private to the GP and will not be shared with any other users of the platform.

Although the company name will be searchable within the company database.

Clicking on the Online Template button brings you to the first step where you can choose up to three SASB industries that apply to your company based on percentage of revenue derived from these industries, based on which, the sector-specific disclosure questions will apply.

You can then provide the percentage of the company's revenues derived from the selected sectors, primary, secondary, and tertiary industries.

Under Step 2, you can use the information hover-over icons to view the description of select datapoints and learn more about the metrics. The questions and datapoints are voluntary in nature, but we encourage you to provide as much information as you can.

And please note that throughout this process, you can save your draft questionnaire and return to it at anytime. If you quit MSCI ONE, your draft can be accessed by going back to the "Online Template" and filling in your company name and the applicable fiscal year.

After you have completed the general questions, Step 3 has you enter the sector-specific ESG and Climate disclosures.

For each selected industry based on the IFRS (SASB) Foundation's Sustainable Industry Classification System® (SICS®) a set of questions is generated.

These questions include those relating to between three and five disclosure topics prioritized for borrower attention. The disclosure topics have been identified as financially material in the internationally recognized SASB Standards pertaining to that industry.

Finally, Step 4 is where you submit your completed disclosure template. And, as a reminder, you can always return to the questionnaire to edit, update or enter new data. Just be sure to keep the fiscal year accurate.

If you instead wish to upload the completed excel file, I will take you through that process now. Under the Upload a Disclosure column, you can click on the Upload Excel file button.

This brings you to the page where you can download the excel template and then upload the file once complete.

The ESG IDP Template is preselected and will download when you click the button.

As you can see, the ESG IDP template comes with an introduction and overview to better guide you through the data disclosure process.

The second tab has the SASB Industry descriptors for your reference. And then the third tab takes you right into the general overview data disclosure questions. The tabs highlighted in green denote required fields. The rest of the tabs are all industry-specific based on the relevant data points that apply.

Once those tabs are completed, you can go back to the Upload Disclosure page, add your company name, and submit the completed excel file. The Excel will take no more than five minutes to validate and show up as completed.

Going back to the homepage, I also want to show you the request access process.

Here, you can type in a company's name and if they are already in our system, their name will pop up with a check box. Once you select the company, their profile is pulled up and you can request access from them to view their data.

You can view the status of your request next to each company's name, which will come up as pending, denied or enabled.

Now, if at any time you need technical support, you can click on the question mark at the top right hand side of the screen to submit a support ticket.

When filling out the ticket, kindly ensure Private Company Data Connect is in the subject line followed by your request. This will ensure all messages are responded to quickly and efficiently.

As you are navigating the platform, the Knowledge Hub is here to help provide answers to any common questions, and take you through the disclosure process with a Navigation Guide. You can also always come back and reference this demo recording.

We have also included timely Sustainability and Climate Research from our excellent Research team, and you can click here to learn more about the suite of private assets solutions that we offer.

Thank you for taking the time to go through this demo and for your interest in MSCI's Private Company Data Connect platform.

If you have any other questions, please reach out to your contact at MSCI.

I hope you find this demo helpful.

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