

# To Meet Investor ESG Demand, Broadridge Enhances Fiduciary Toolkit for Financial Advisors

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Enhancement enables financial advisors to leverage ESG rating data in conjunction with pecuniary factors to construct client portfolios

NEW YORK, Oct. 13, 2021 /PRNewswire/ -- In order to meet the growing demand for environmental, social and governance (ESG) analysis from investors and advisors, **global Fintech leader Broadridge** today announced an enhancement to its Fi360 Fiduciary Focus Toolkit™, allowing financial advisors to leverage ESG rating data from **OWL Analytics** when evaluating investment decisions.

"Interest in ESG investments is accelerating among U.S. investors and they are looking to advisors and plan sponsors to provide the desired products to meet their financial and personal goals. This is both an opportunity and a challenge for fiduciary advisors," said John Faustino, Head of Broadridge's fiduciary certification and training solutions. "It is a natural evolution of the Fiduciary Focus Toolkit to help advisors identify ESG exposures that align with sound fiduciary due diligence."

The Fiduciary Focus Toolkit, a web-based software solution that provides analytical, management and reporting features for investment managers, enables advisors to implement a prudent investment process. Through this enhancement, advisors can use the ESG scoring as standalone screening criteria or in conjunction with other metrics like returns, alpha or the Fi360 Fiduciary Score®, giving advisors the ability to search for and monitor funds on pecuniary merit first and then overlay the ESG screening.

ESG ratings from OWL Analytics will automatically update for advisors monthly within the Fiduciary Focus Toolkit. Investments are scored for overall ESG factors as well as the individual environmental, social and governance level so advisors can perform the analysis based on what's important to the client or retirement plan.

"OWL Analytics is on a mission to empower financial professionals with up-to-date, unbiased ESG analytics," said Benjamin Webster, CEO and President, OWL Analytics. "We are thrilled to fuel the Fiduciary Focus Toolkit with ESG ratings because it broadens access by giving fiduciaries the opportunity and flexibility to make ESG a part of their investment screening process."

## About Broadridge

Broadridge Financial Solutions (NYSE: BR), a global Fintech leader with \$5 billion in revenues, provides the critical infrastructure that powers investing, corporate governance, and communications to enable better financial lives. We deliver technology-driven solutions that drive business transformation for banks, broker-dealers, asset and wealth managers and public companies. Broadridge's infrastructure serves as a global communications hub enabling corporate governance by linking thousands of public companies and mutual funds to tens of millions of individual and institutional investors around the world. Our technology and operations platforms underpin the daily trading of more than U.S. \$9 trillion of equities, fixed income and other securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 13,000 associates in 21 countries. For more information about us please visit [broadridge.com](https://broadridge.com).

## About OWL Analytics

OWL Analytics is a data and analytics provider that offers environmental, social, and governance (ESG) and socially responsible investing (SRI) metrics on global equities, corporate bonds, mutual funds, ETFs, and other fund products. Founded in 2012, our clients are some of the largest global banks, asset managers, asset owners, and indexing companies in the world. They turn to OWL for a diverse range of ESG products and customized solutions, helping them meet their sustainability mandates as they expand and evolve. For more information, visit [www.owlanalytics.net](https://www.owlanalytics.net).

## Media Contacts:

Matthew Luongo

Prosek Partners

+1 646.818.9279

[mluongo@prosek.com](mailto:mluongo@prosek.com)

Linda Namias

Broadridge Financial Solutions

+1 631.254.7711

[Linda.Namias@broadridge.com](mailto:Linda.Namias@broadridge.com)

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