GRESB INVESTOR MEMBER PORTAL GUIDE

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GRESB provides Investor Members with high quality data and analytics on the environmental, social and governance (ESG) performance of real estate and infrastructure portfolios and assets. Investors use the data and analytical tools to manage ESG risks, capitalize on opportunities and engage with managers on sustainability issues.

You can view the individual results of participating entities online in the Member Portal, download reports for additional analysis and take advantage of the following engagement tools and services:

INVITE PARTICIPANTS
GRESB Investor Members are encouraged to use the “Invite” feature in the Member Portal to contact any manager or operator to prompt participation during the Assessment open period (April 1 - July 1, each year).

RESPONSE TRACKER
The Response Tracker allows GRESB Investor Members to track the progress of Assessment submissions and identify investments that may require additional outreach.

BENCHMARK REPORTS
The Benchmark Report contains an indicator-level analysis of a participant’s ESG performance in both absolute terms and relative to peers. It is designed to identify areas of risk and opportunity and deepen engagement on sustainability issues.

DATA ACCESS REQUESTS
To maximize portfolio coverage and achieve a full portfolio view, GRESB Investor Members can request data access from Assessment participants. The ‘Data Access Request’ tool enables you to request data access for each portfolio managed by a GRESB participant. Pending requests can be tracked in the Member Portal.

PORTFOLIO ANALYSIS TOOL
Using the Portfolio Analysis Tool, investors can perform a portfolio analysis for self-selected groups of their investments, including application of weights and customized benchmarks. This online tool provides relevant insight into how each investment contributes to the investment portfolio’s aggregated ESG performance. It also provides a combined environmental footprint of the investment portfolio.
1. Open the **GRESB website** and log in to your GRESB account.

If you currently do not have a GRESB member user account, please contact info@gresb.com.

2. In the GRESB Portal, select the **Reports** tab in the navigation bar on the right-hand side of the page.
1. ** Invite participation** in the GRESB Assessment.

   Invite the company/fund to participate in the Assessment by sending them an invitation.
Use the Response Tracker to track the progress of Assessment submissions and identify investments that may require additional outreach.

1. Review reports from previous Assessment years.
2. Track progress in completing the Assessment.
3. Review the participant’s intention to submit and click on the 💬 icon to find out why a company or fund will not submit.
In the **Reports** tab, you are able to:

1. view individual Benchmark Reports of Real Estate and Infrastructure participants.
2. apply filters to find the results of specific participants.
3. find an in-depth analysis of a participant’s sustainability performance.

**Benchmark Reports of participants** that are currently allocated to your account

**To switch between different Assessment types, select the specific Assessment type here**

**Request data access** to the Benchmark Reports of the available company/funds that participated in the Assessment but are not allocated to your account yet

**Search for specific companies/funds** that participated in the Assessment

**Information about the participant’s legal structure, sector and region**

**Review the GRESB performance** of the participants to whom you have access. The Benchmark Reports for previous years are available if the company/fund participated in the Assessment. A Benchmark Report contains an in-depth analysis of a company/fund’s sustainability performance

**Review the Public Disclosure performance** of all listed property companies and REITs
1. In the Reports overview, select the **Available Company/Funds** tab.

2. To monitor or cancel access requests, click on the **Pending Requests** button.

All companies and funds available in the GRESB Portal are displayed in the list. You can request access to the data of a company or fund by clicking on the **Request Access** button.

Check whether the company or fund participated in previous Assessment years.

When you click the **Request Access** button, the account manager will receive a request to grant access to their GRESB data. Once access is granted, you will be notified via the GRESB Portal.
In the **Portfolio Analysis tool**, you are able to create a new portfolio analysis or access existing analyses. These functionalities are available for the years 2013, 2014, 2015, 2016, 2017 and 2018.
1. **Select your investments**

You can **create a new portfolio**, which can be used for internal purposes (e.g. identify engagement targets) as well as external purposes (e.g. communication or reporting to stakeholders).

2. **Distribute weights** for your investments

You have the option to create a value-weighted analysis (your investment allocation for each entity) or an equally-weighted analysis (each entity receives the same allocation).

3. **Define the benchmark** against which you wish to benchmark your selection

You have to define the benchmark for your portfolio selection.

4. **Select next step to analyze** the portfolio selection
The highlights display your Portfolio selection and the benchmark scores and characteristics.

The sum of the scores for each Assessment indicator adds up to a maximum of 138.5 points, and the overall GRESB Score is then expressed as a percentage – from 0 to 100. The GRESB Score also shows relative performance based on the entity’s quintile position – from 1 to 5. Every quintile and corresponding rating contains 20% of the peer group. If the entity performs in the top quintile, it receives a rating of 5; if it falls in the bottom quintile, it receives a rating of 1.

The scores for Management & Policy and Implementation & Measurement are visualized using the GRESB Model. Each participant is allocated to one of the quadrants. The horizontal and vertical lines show the cut-off for each quadrant. The diagonal lines show the cut-off for each quintile, based on relative performance.

The overall GRESB Score is broken down into separate scores for the two GRESB dimensions and separately for Environmental, Social and Governance (ESG).

These scores are calculated based on the allocation of individual questions to E, S, or G. The absolute score is expressed as a percentage from 0 to 100, and the relative score is expressed as a rating from 1 to 5, relative to the peer group.

In case weights per investment are applied, all scores are weighted based on this allocation. This does not account for the like-for-like change of energy, GHG and water, nor the absolute GHG emissions reported.
Edit, print or create a new Portfolio analysis report.

You can edit the selection, weights or benchmark for your Portfolio analysis.
Enhance and protect shareholder value by assessing and empowering sustainability practices in the real asset sector.