

Case Study.
Brandes Investment Partners.
United States.
Public Equity.

A novel, authentic approach to ESG investing strategy pays off

Challenge

A forward-looking investment advisory firm specialising in value equity and value fixed-income assets, Brandes manages more than €21B in assets worldwide.

To embrace growing interest in ESG, the firm sought to expand ESG Integration across the investment process, as well as achieve SFDR article 8 classification for funds that promote environmental or social characteristics. Brandes selected dss+ to conduct a current state assessment, design a target state including article 8 funds and partner on implementation over the long term.

dss+ Approach

dss+ consultants evaluated practices and policies at the firm and throughout the full investment process, conducting interviews to gain insight into current levels of ESG practice as well as strategic objectives for integration.

An SFDR competitive analysis was developed to benchmark Brandes against its peers and best practice, and to pinpoint opportunities for differentiation. The dss+ team also advised on data strategy and identified fitting providers.

After outlining strategic integration points for ESG topics



and functions that align with the firm's objectives and capacity for influence, dss+ continues to advise on final design and implementation of the target state.



Assignment

Assessment of ESG current state and SFDR article 8 fund opportunities, with support for target state design and implementation.



Offering

ESG consulting.



Impact

Creation of a novel strategy for integrating ESG considerations into the investment process with an eye toward rigor, transparency and efficiency.

Executives and deal teams have received training on future-proof opportunities that do not rely on loopholes and greenwashing.



dss+

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