

Best ESG Software & Service Provider 2024 & Wealth & Finance Sustainable Investing Tech Innovators of the Year 2024

BasisPoint+

Leading the market in both software provision and investment advisory demands that a business understands complexities across its clients' functional areas, and the tensions—and opportunities—that arise where those areas intersect. BasisPoint+ is one example of a business pioneering cross-functional solutions for asset owners, investment managers, and companies. We had the chance to speak with CEO of BasisPoint+, Andrew Pemberton, who explained the company's cutting-edge place within this industry.



BasisPoint+ is a software and service provider which helps investors and companies build enterprise value, explore growth opportunities, and meet regulatory requirements. It does so through proprietary software that combines guided workflows with powerful data analytics to streamline ESG and impact investment processes. BasisPoint+ aims to help its clients enhance their market edge by turning business-relevant sustainability insights into tangible growth.

BasisPoint+ offers its clients a one-stop-shop for technology-enabled strategy, compliance, and capital advisory services. Its built-for-purpose software combines several critical functions, such as pipeline management, business intelligence, and report generation into a single, self-guided tool. Users who integrate BasisPoint+ into their investment process save time in deal analysis, uncover new business insights, and minimize frustration in reporting and disclosure. They also benefit from capital markets advice, with access to placement agent services and M&A advisory to help grow their funds and optimize portfolios with sustainability principles in mind.

By following BasisPoint+'s guided workflows, users can better meet requirements for leading legal frameworks and self-regulatory standards. Modular components allow users to implement a simple yet market-leading methodology on day one while adding increased rigor as desired over time. The software is continually updated with the latest standards and includes an impressive range of functionalities, like customizable analytical templates for each stage of the investment

lifecycle and interactive stakeholder engagement for goal setting and action plan management. Indeed, BasisPoint+ remains a cut above other solutions thanks in part to its connectivity between users as a single source of truth for companies, investment managers, and asset owners.

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BasisPoint+ is designed with flexibility in mind, recognising that no two investors or companies will have the same point of view on what sustainability levers are material to their strategic and operational success. Beyond customization of the software, our services and delivery ecosystem ensure we provide the support that's most needed and value-adding.
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In 2024, the company is primed to further enhance its product feature set and to work closely with standard setters as ESG and

impact investing requirements continue to converge. It also has plans to expand its partnership ecosystem, which brings added expertise to BasisPoint+ clients, including for services like independent verification and climate/carbon emissions analysis.

Bringing together technical capabilities with capital markets advisory and other targeted support allows BasisPoint+ to serve as an extension of its clients' teams, helping to improve investment outcomes and identify new deal flow and fundraising opportunities. BasisPoint+ looks forward to bringing more investment managers up to speed with ESG and impact investing capabilities, helping them to create additional value and demonstrate meaningful results.

Applying a combination of powerful technology, differentiated services, and an ecosystem of market-leading partners, BasisPoint+ is proud to play its part in the fast-growing sustainable investing space. Its approach is one indicator among many that ESG and impact investing is a priority not only for an organization's technology strategy, but also for its broader goals for strategic growth.

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Company: BasisPoint+
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