

AERIS ATLAS

An intuitive and easy-to-use cloud-based software platform for collecting, aggregating, analyzing, and reporting impact and financial data.

Aeris® Atlas makes it easy for portfolio companies to report data to asset managers. It helps asset managers and their investors gain clearer insights into portfolio performance.



Key Benefits and Features:

- ✓ **Increased efficiency and accuracy by streamlining data collection and reporting—get the right data to the right people at the right time**
 - Automated email notifications and reminders
 - Customizable requests for each portfolio company
 - Flexible data input methods: Excel upload or survey form response
- ✓ **Quick and easy configuration of customized or standard metrics and documents**
 - Efficient creation of customized metrics and hierarchies
 - Easy configuration of document libraries, folders, and document creation
- ✓ **Easy alignment with common frameworks/taxonomies (SDGs, IRIS+, IMP, more)**
 - Choose from core metric sets or create your own
 - Align your metrics with related impact frameworks
- ✓ **Collect both numeric data (financial, impact, operational) and impact narratives**
 - Customized frequency of reporting on a portfolio-wide or organizational basis
- ✓ **Aggregate and analyze data across portfolios**
 - Dashboards for monitoring investment goals
 - Real-time data, ready for analysis
 - Custom equations/formulas
 - Export to Excel
- ✓ **Access longitudinal analytics—for individual companies or a portfolio**
 - Future period data and forecasting
 - Ability to add targets for portfolio companies



AERIS

Aeris is a rating and information service for impact investors.

Our mission is to accelerate the pace of impact investing by bringing accountability, transparency and standardization to investment practices.

Our business is:

Impact management assessments that evaluate the investment systems and practices of fund and asset managers relative to stated impact theses or mission.

Software solutions that enable impact investment managers to collect and analyze impact and financial performance data on investment portfolios and underlying assets.

Ratings and data services on community development funds (CDFIs) that support investors' due diligence and ongoing monitoring.

For additional information:

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