

Transforming ESG Data Management.

Case Study_



Portobello

APLANET

Introduction.

Portobello Capital, a leading venture capital fund manager in the “Middle Market” in the Iberian Peninsula, faced a significant challenge.

Founded in 2010 and managed by a team of financial experts, Portobello Capital has demonstrated an **ongoing commitment to social, environmental and governance responsibility**. Their commitment to the companies in which they engage is to identify the opportunities and risks and provide them with all the help they may need to progressively improve in the management of ESG (Environmental, Social, and Governance) aspects.

However, **collecting and tracking ESG data from** the many companies in which they invest presented considerable difficulties. Before the implementation of APLANET's software, ‘SUSTAINABILITY’, Portobello Capital managed this data in an Excel spreadsheet, a process that turned out to be both time and resource intensive. The lack of a centralized system for collecting and tracking ESG data made it difficult to identify opportunities and risks, as well as to provide the necessary help to the companies in which they invest to improve their ESG management.

Together with Marisa González in her role as Investor Relations, this case study explores how Portobello Capital implemented APLANET’s software to overcome these challenges and improve its management of ESG data.

The Obstacles to ESG Data Management.

The main challenge for Portobello Capital lay in the efficient management of ESG data. Collecting this data from a multitude of companies, each with its own methodologies and formats, presented a monumental task. In addition, once collected, the effective monitoring and use of all this information became an even more daunting task.

The data collection process was manual, which involved asking each company to submit their ESG data and then consolidating it in one place for analysis and tracking. This process was not only laborious, but also prone to errors and inconsistencies.

Before the implementation of 'SUSTAINABILITY', Portobello Capital managed this data in Excel. Although Excel is a powerful tool, it is not designed to handle the complexity and volume of ESG data that Portobello Capital needed to manage. This resulted in a time and resource-intensive data management process, limiting Portobello Capital's ability to identify opportunities and risks and provide the necessary assistance to the companies in which they engaged.

In short, Portobello Capital needed a **solution that could simplify and automate the ESG data collection process**, provide effective tracking, and enable efficient use of the information collected.

Innovating Data Management with APLANET.

To address the challenges identified, Portobello Capital decided to implement a digitalized solution through sustainability management software.

After a thorough selection process, they decided to implement 'SUSTAINABILITY', APLANET's all-in-one ESG data management software.

The implementation of the solution was carried out in **several stages**. First, Portobello Capital worked closely with APLANET to define business requirements and key sustainability indicators. The goal was to ensure that the software provided a clear and complete view of the sustainability data of all its investments.

The second phase focused on the integration of data from the different companies in Portobello's portfolio. Data collection protocols were established to ensure consistency and accuracy. To facilitate this process, a series of training workshops were held for Portobello Capital's portfolio companies, focusing on the importance of sustainability and how to use the new system.

“For me, APLANET is a fairly simple tool, that is, in terms of sustainability and all the tools I have seen, it is much simpler than the others.”

Marisa González,
Investor Relations en Portobello Capital



The final phase of implementation included the launch of the platform and its constant monitoring. Custom alerts were set up to notify users about significant changes in sustainability indicators. In addition, an integration with the company's reporting system was made to allow the efficient generation of sustainability reports.

Throughout the process, APLANET provided comprehensive support, helping Portobello Capital to customize and optimize the platform according to their needs. The implementation was a joint effort that required a high degree of collaboration and communication between both parties.

“APLANET is fundamentally a time saver and provides the possibility of having a place where we have all the information centralized.”

Marisa González,
Investor Relations en Portobello Capital

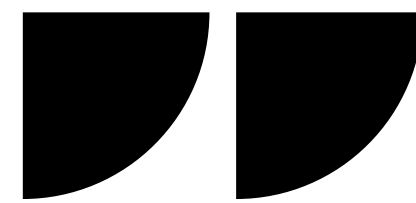


Results: Maximizing Efficiency with APLANET

The implementation of APLANET's solution at Portobello Capital has had a significant impact on the way the company manages the sustainability of its investments.

“You can delegate to your departments and to different people in the company's team, the report of a series of indicators, with which the work is much easier, it becomes more bearable for everyone.”

Marisa González,
Investor Relations en Portobello Capital



Firstly, the **transparency and accessibility** of sustainability data has improved considerably. Previously scattered and often inconsistent reports have been consolidated into a single platform, providing a clear and comprehensive view of the sustainability efforts of the entire portfolio. The management team now has access to up-to-date and detailed information, allowing them to make more informed decisions aligned with the company's sustainability goals.

Second, APLANET's solution has facilitated the **accountability and measurement of progress**. The ability to set up custom indicators and receive real-time alerts has allowed Portobello Capital to monitor the sustainability performance of its investments more efficiently. The company has been able to identify areas for improvement and take corrective action in time.

“With APLANET it's much easier to quickly track where each company is... The good thing is that you can give several people the possibility to input the data whilst keeping track of it.”

Marisa González,
Investor Relations en Portobello Capital



Third, the implementation of APLANET's software has boosted the commitment to sustainability across all the companies in Portobello's portfolio. The intuitive system has made it easier for employees to understand the company's sustainability goals and how their work contributes to these goals.

Finally, the ability to generate sustainability reports efficiently has allowed Portobello Capital to communicate its sustainability efforts more effectively to stakeholders. This has enhanced the company's reputation for sustainability and created significant value for investors.



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TO DRIVE
BUSINESS GROWTH**