SUSTAINABLE FINANCE

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Policy | Diligence | Monitoring

ESG in Investment: From Policy to Portfolio

For banks, SACCOs, pension schemes, asset managers, private equity, venture capital and impact investors.

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Why This Matters

Capital Needs an ESG Lens

- ESG belongs in investment policy, due diligence and monitoring, not only in reporting.
- Investors, lenders and assurance providers all test how well it is built in.

The goal: ESG integrated across the whole investment cycle.

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Framework

Build the Framework First

- **ESG investment frameworks** and policies
- **Green finance strategy**
- **Climate finance advisory**

The result: clear rules for what you fund and why.

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Diligence

Diligence Before Commitment

- **ESG due diligence** on prospective investments
- Environmental, social and governance risks identified before capital is committed

The result: ESG findings that inform the investment decision.

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Monitoring

Monitor the Portfolio

- **Portfolio ESG monitoring** after investment
- **ESG KPIs** tracked consistently across holdings
- **Dashboards** that keep the investment team informed

The result: ESG performance you can follow, not just report.

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Readiness

Be Ready for Scrutiny

- Reporting quality review
- Evidence mapping and documentation readiness
- Assurance readiness review

Prepare for questions from investors, lenders and assurance providers.

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Work With Us

Let’s Work Together

Our sustainable finance team helps you:

- **Frame** ESG in investment policy
- **Screen** deals with ESG due diligence
- **Monitor** portfolio ESG performance

Talk to us
info@melanelconsulting.com
+254 712 299 726 | melanelconsulting.com
X @Melanelconsult | LinkedIn: Melanel Consulting