



Investments

From ESG metrics  
to meaningful insights



**Senzo Langa**

**Chief Investment Officer:  
Institutional**



## The need for clarity

ESG reporting has evolved significantly in recent years, but inconsistency remains a challenge. Investors often face a patchwork of metrics that are difficult to compare, making it harder to assess portfolio exposures or track progress meaningfully.

Our 2025 Stewardship Report highlights how Alexforbes is addressing this challenge by building ESG reporting that is comprehensive, consistent and comparable. Our approach covers all asset classes, not just equities and combines qualitative insights with quantitative data. We track ESG performance using three core metrics:



### Climate change:

Weighted average carbon intensity (WACI)



### Gender diversity:

Female representation at the board level



### ESG integration:

Ratings of asset managers' ESG processes and frameworks

These metrics highlight where portfolios are well-positioned and where risks may need to be addressed, enabling more targeted engagement with asset managers.

## Why our approach stands out

This level of transparency is still uncommon in the industry. Investors are used to seeing ESG reporting that is siloed, with metrics tracked separately by asset class or region. Our integrated view provides a clearer line of sight into how portfolios are performing on material ESG issues across the board.



**By combining data and narrative, we help clients understand why the metrics matter and how they translate into risks or opportunities and ultimately, how these impact returns.** For example, high carbon intensity in a portfolio may indicate increased exposure to transition risk from technological risks or market risks. Tracking this metric allows us to engage with asset managers and companies early to mitigate potential impact on value.

## Raising standards

Our reporting also aligns with local and global standards, helping clients meet regulatory and stakeholder expectations. We continue to refine our approach using the latest frameworks, including those set by the International Sustainability Standards Board (ISSB), to ensure the metrics we report are comparable and decision-useful.

We have seen how stronger reporting drives accountability. When ESG performance is consistently measured, it is harder for asset managers and companies to make commitments without demonstrating progress. This makes engagement more effective and ultimately raises standards across portfolios.

Strong ESG reporting builds trust, improves decision-making and ensures that capital is being deployed responsibly. By giving clients integrated insights that highlight both risks and opportunities, we enable them to make informed choices and demonstrate the value of their investments.



At Alexforbes, we believe that consistent, high-quality ESG reporting is key to building resilient portfolios and delivering long-term returns.

By connecting ESG data with actionable insight, we help build portfolios that perform today and are well-positioned for the future. This transparency supports better risk management, strengthens oversight and demonstrates how investments contribute to long-term value creation in financial terms and through their impact on society and the broader economy.



**With Alexforbes, no matter your investment destination, you're in the right place.**

[Read our 2025 Stewardship Report here](#)

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