# ESG Sentinel

## User Guide

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### Asset Manager Solution

**Revolutionizing ESG Risk Intelligence with Gen AI**

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# 1 Welcome to ESG Sentinel

- Rapidly detect and analyze **global ESG incidents** from one **AI-powered platform**.
- Uncover **real-time**, **unbiased insights** into ESG incidents, risks, and performance levels of your investee companies and supply chains.
- Categorize millions of news articles, NGO reports, and social media sources with advanced **risk, severity,** and **credibility** scores.
- **Optimize your investment portfolio**, drive client engagement, and ensure watertight regulatory compliance.

## 1.1 What is ESG Sentinel?

ESG Sentinel is an all-in-one, AI-powered risk intelligence platform that detects, monitors, and classifies ESG incidents affecting your investments.

Drawing from millions of trusted news articles, NGO reports, and social media sources in over 64 languages, ESG Sentinel lets you dive deep into specific companies, industries, and supply chains, navigate complex financial regulations, and break down ESG incidents to their finest details.

From this platform, armed with a range of advanced risk monitoring features, you can uncover the driving forces behind global ESG activity and gain full visibility over your portfolios.

**Ready to begin?** Head to the Getting Started section and learn how to gain access to ESG Sentinel.

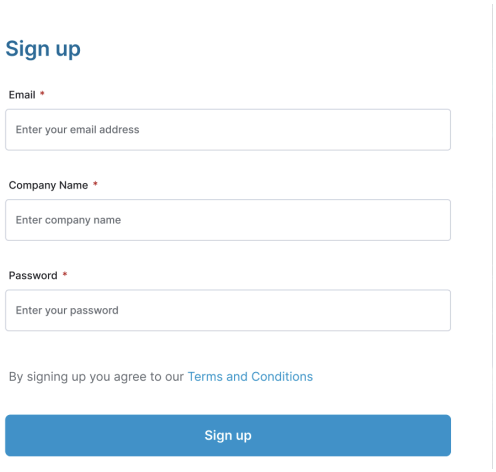
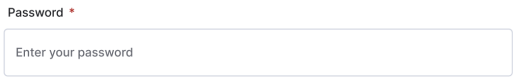
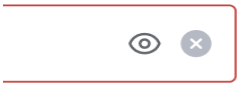
*Learn more about Syenah's mission, values, and culture on our About page.*

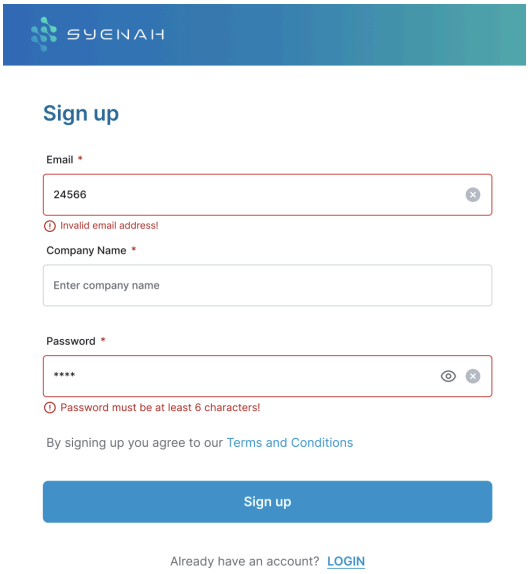
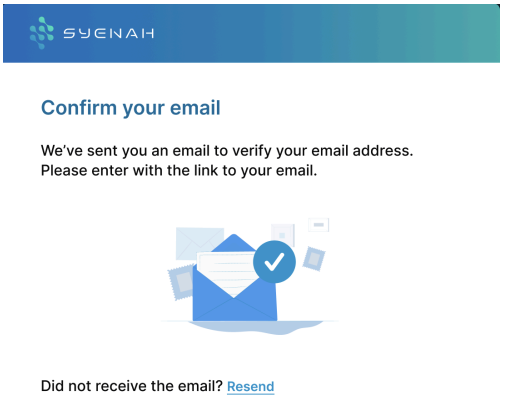
# 2 Getting Started

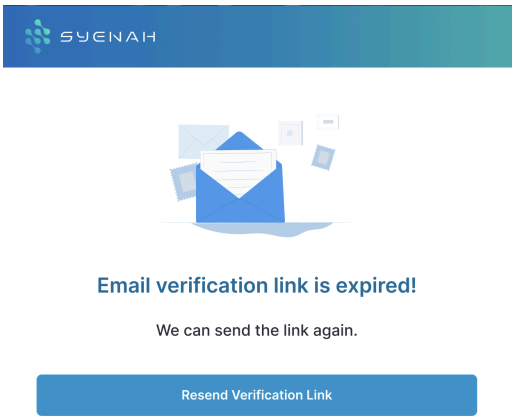
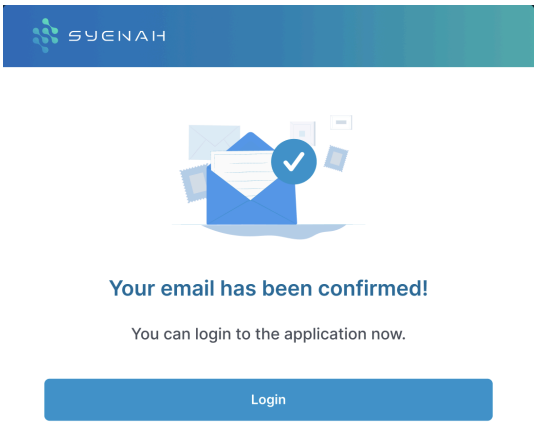
## 2.1 Signing Up

Welcome to ESG Sentinel. Thanks for joining us! If it's your first time here, you'll need to create an account to use the platform.

*Already have an account? Skip ahead to Logging In.*

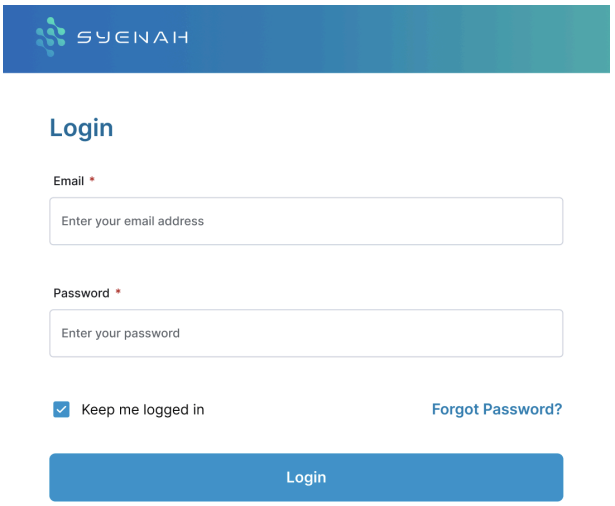
| | | |
|---|---|---|
| **Enter Details** | The **Sign Up** screen appears when you first open ESG Sentinel.<br><br>**1.** Enter your email address and company name in the fields provided.<br><br>*Note: You'll need to use a corporate email to sign up.*<br><br>**2.** If you already have an account with ESG Sentinel, click **LOGIN** at the bottom of the screen. This takes you to the Login screen. | **1.**<br>  <br><br>**2.**<br>Already have an account? LOGIN |
| **Choose Password** | Choose a strong password for your new account and type it into the **Password** field.<br><br>Your password must be at least six characters long, and it's also good practice to include a variety of numbers and symbols.<br><br>**2.** To see your password in plaintext, click on the **eye symbol**. | **1.**<br>  <br><br>**2.**<br>  |

| | | |
|---|---|---|
| **Invalid Details?** | If either your email address or password are invalid, you'll see a red alert. You won't be able to continue until you fix the error.<br><br>*Note: Check for and delete any empty spaces in the text fields, and make sure you haven't accidentally switched on caps lock.* |  |
| **Accept Terms and Conditions** | **1.** Once you've entered your details, click **Sign Up**. By doing this, you accept Syenah's terms and conditions.<br><br>**2.** To read these in full, click on the **Terms and Conditions** link. | **1.**<br> <br>**2.**<br>By signing up you agree to our Terms and Conditions |
| **Confirm Email** | **1.** A confirmation link will be sent to the email address you entered.<br><br>Head over to your inbox, find the email, and click on the attached link to validate your details.<br><br>*Note: If you can't see the confirmation email in your main inbox, try checking your spam folder.*<br><br>**2.** Give it a few minutes for your confirmation email to arrive. If nothing comes through, click the **Resend** link in the screen above. | **1.**<br>  <br>**2.**<br>Did not receive the email? Resend |

| | | |
|---|---|---|
| | **3.**<br>If you wait too long to validate your email address, the link will expire and you'll need to resend it by clicking the **Resend Verification Link** button. | **3.**<br>  |
| **Proceed to Log In** | When you've successfully confirmed your email address, you'll be able to access ESG Sentinel. Click **Login** to continue. |  |

# 2.2 Logging In

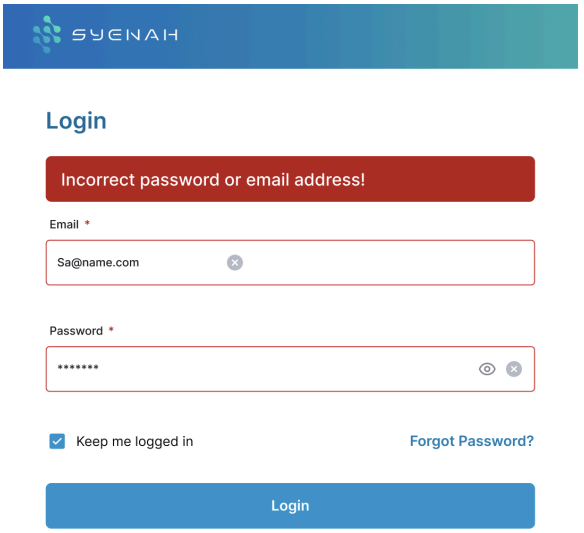
At the **Login** page, enter the email address and password you registered with into the fields provided.

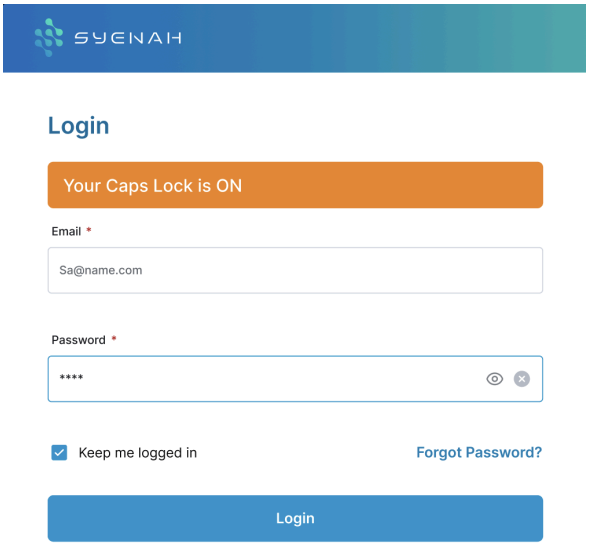



Then, select the **Login** button.

If your details are correct, you'll gain access to the ESG Sentinel platform.

*Note: Select **Keep me logged in** if you'd like ESG Sentinel to remember your details for next time.*

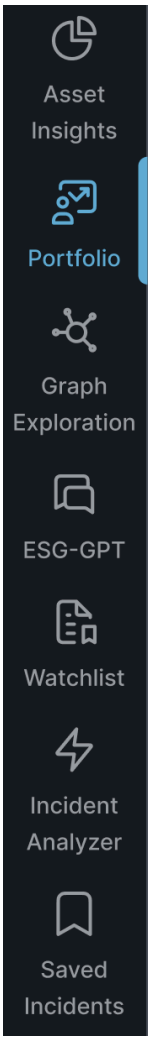
| **Having trouble logging in?**<br>Check the following errors if you're unable to log in to ESG Sentinel. | | |
|---|---|---|
| **Incorrect Details** | You'll get an alert if your login details are incorrect.<br><br>Make sure you haven't included any empty spaces in the text fields, or that you haven't accidentally switched on caps lock.<br><br>*Note: Click on the eye symbol in the password field to see your password in plaintext.* |  |

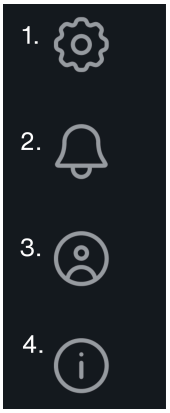
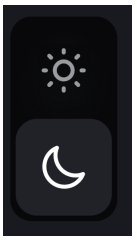
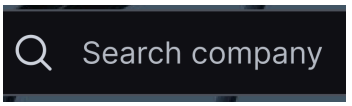
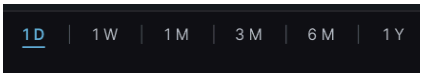
| | | |
|---|---|---|
| **Caps Lock** | If your caps lock is on, you'll get an alert.<br><br>Switch this off if not necessary for your password; it could be invalidating your details. |  |
| **I've Forgotten my Password!** | See the troubleshooting section. | |

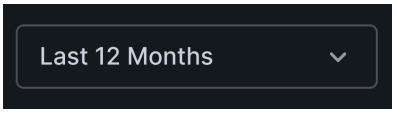
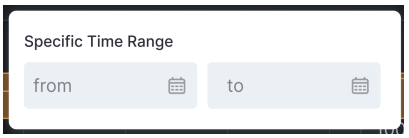
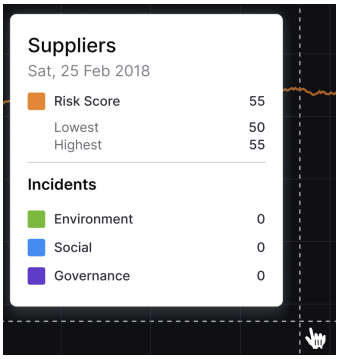
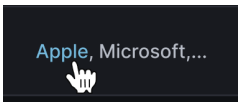
# 3 ESG Sentinel: The Basics

## 3.1 Navigating the Platform

From the ESG Sentinel platform, you can explore different features, adjust your settings, set up alerts, and search for companies. Here's a quick guide to where everything is on ESG Sentinel and how to make sense of it.

| | | |
|---|---|---|
| **Opening Main Features** | Your main dashboard is your Asset Insights, but you can switch between ESG Sentinel's key features anytime using the tabs on the left-hand side of the screen.<br><br>Click on an option to open the feature.<br><br>**Jump ahead:**<br><br>• Asset Insights<br>• Portfolio<br>• Graph Exploration<br>• ESG-GPT<br>• Watchlist<br>• Incident Analyzer<br>• Saved Incidents |  |

| | | |
|---|---|---|
| **Opening Settings** | You can also find your settings in the left-hand column, right below the main features.<br><br>Click on an option to open it.<br><br>**Jump ahead:**<br><br>1. Advanced Settings<br>2. Alert Center<br>3. Profile Settings<br>4. Help Center |  |
| **Light and Dark Mode** | Switch between light and dark mode using the toggle in the left-hand column, below your settings.<br><br>This changes the view across the entire platform, including other features. It does not change key information or color-coded risk scores. |  |
| **Searching For Companies** | Use the search bar at the top of the page throughout the ESG Sentinel application to search for a company and view their information page.<br><br>Start typing the company's name until it appears in the dropdown menu, then select it. This opens the Company Page. |  |
| **See Information** | You'll see a small information (i) icon next to charts, summaries, and data points across ESG Sentinel.<br><br>Hover over this symbol to see a brief summary or tip for the section. | |
| **Adjusting Time Ranges** | Many of the charts on ESG Sentinel let you filter data by time. If these filters are provided, you can either:<br><br>**1.** Adjust the **general time range** for your data (from one day to one year) using the toolbar above the chart.<br><br>**2.** Select a **specific time range** by clicking on the dropdown menu and entering start and end dates into the fields provided. | **1.**<br>  <br><br>**2.** |

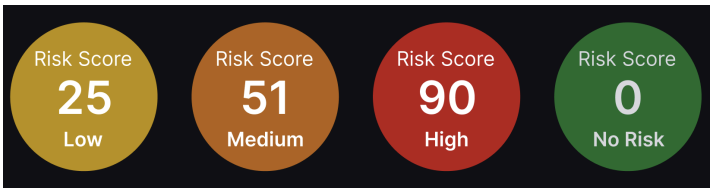
| | | |
|---|---|---|
| | You can also pick these dates from a calendar by clicking on the calendar icons.<br><br>**3.** See data for a **specific date** by clicking on the calendar icon and choosing a date from the calendar. |  <br>  <br>**3.**<br> |
| **Hovering and Clicking** | Many sections on ESG Sentinel, including charts, summaries, incident titles, and other data points, are interactive.<br><br>Each section will be covered in more detail throughout this guide, but keep in mind that you can often hover over elements for a quick overview and click them to access more detailed features like the Incident Analyzer, Incident List, and Breach List for deeper insights. |  <br>  |

# 3.2 ESG Scoring

At the heart of ESG Sentinel lies its scoring system. The platform is powered by a proprietary AI algorithm which analyzes millions of online articles, NGO reports, and social media sources to assign three types of scores to your ESG risk intelligence. These include:

1. **Risk Score:** Measures how much potential damage an ESG issue could cause.
2. **Severity Score**: Evaluates how serious an incident is.
3. **Credibility Score**: Determines how reliable incident source material is.

**Risk Scores** and **Severity Scores** are color-coded and rated out of 100, making it easy to grasp how serious an ESG issue might be, and all three scores are updated constantly; based on real-time data.

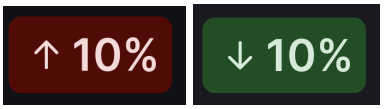



## 3.2.1 Risk Scores

ESG Sentinel's **Risk Score** helps you understand how much of a threat an ESG issue might pose to a company's performance, stability, and reputation.

🔴 **High**: Requires immediate attention and strategic action.
🟠 **Medium**: Should be actively managed to prevent escalation.
🟡 **Low**: A low-risk situation, but still worth monitoring.
🟢 **Secure**: Minimal ESG risk. No immediate concerns.

When an ESG Risk Score changes, you'll see a color-coded percentage indicator showing whether the risk is rising or falling.

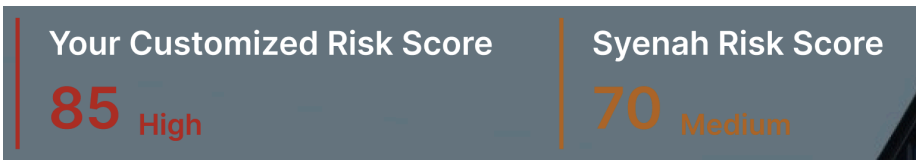



### Customizing ESG Risk Scores

ESG Sentinel automatically assigns risk scores by default. However, you can customize how these scores are decided for specific companies and industries, or across the entire platform.

To start customizing your risk scores, click the **Customize Risk Score** button in the top-right of your Portfolio Page. This brings you to the Risk Score Customization Page.

At the top of this page is your customized risk score (if already customized) and Syenah's default score; generated by ESG Sentinel.




From this page, you can customize how ESG Sentinel assigns risk scores across the platform. Choose between:

- **Risk Score Weight:** Customize how risk scores are weighted for specific industries and companies, including your own, based on ESG categories.
- **Incident Risk Criteria:** Modify the criteria that ESG Sentinel uses to assess a company's risk level.

Use the tabs at the top of the page to switch between these options.

## Risk Score Weight Customization

This option lets you set default risk score weightings across the entire ESG Sentinel platform, or customize them for specific companies and industries.

Each option here takes you to the risk customization panel, where you can tweak the parameters of the risk score based on specific ESG categories.

### Customizing Default Risk Score

Your default risk score applies to all companies and industries on ESG Sentinel; except those that have already been customized.

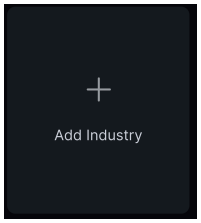
Click **Edit Default Scoring**.

This opens the **risk customization panel** (see below), where you can adjust how your new score is decided based on specific ESG categories.

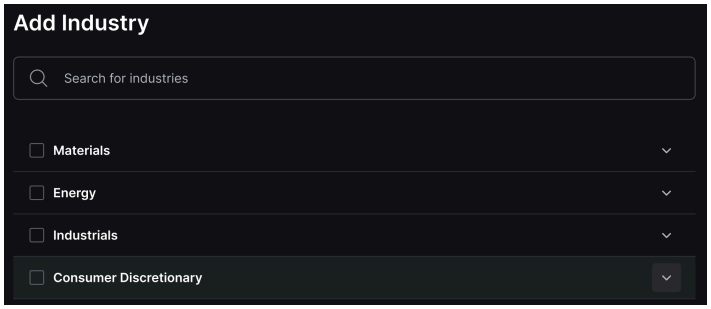
### Customizing Industry Risk Score

Your industry risk score weight applies to all companies within that industry (except companies that you've separately customized).

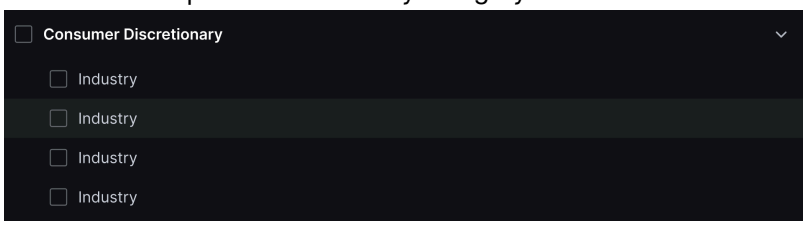
Click the **Add Industry** button.



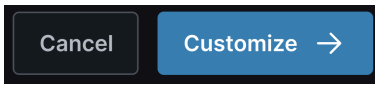

This opens a dropdown menu where you can pick an industry or start typing to find it faster.




You can also expand each industry category to choose related subcategories.



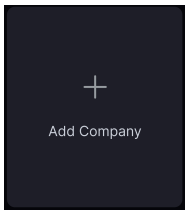

Once you've selected your industries and you're ready to customize their risk scores, click **Customize**.



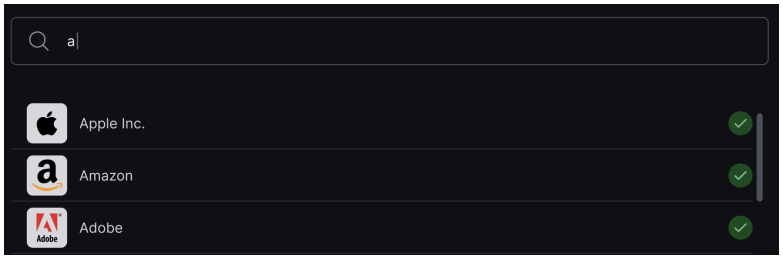

This opens the **risk customization panel** (see below), where you can adjust how your new score is decided based on specific ESG categories.

## Customizing Company Risk Score

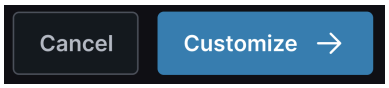
To customize the ESG risk scores for specific companies, click the **Add Company** button.




This opens a dropdown menu where you can pick companies or start typing their names to find them faster.



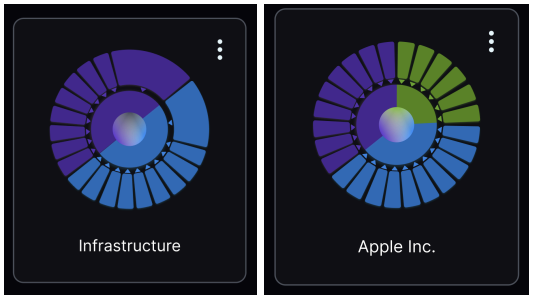

Once you've chosen your companies and you're ready to customize their risk score, click **Continue**.




This opens the **risk customization panel** (see below), where you can adjust how your new score is decided based on specific ESG categories.

## Editing your Customizations

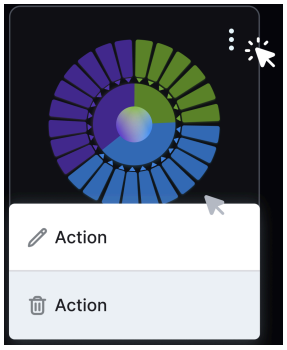
Once you've customized the risk score for a company, industry, or supply chain tier, a link will appear in your settings.



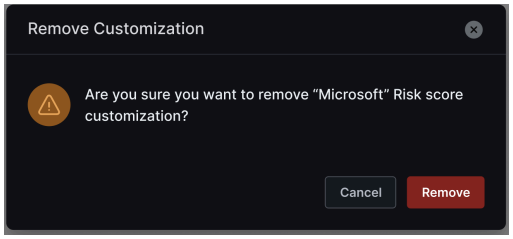

Click on the vertical three-dot menu in the top right of this link to:

- **Edit** the customized risk parameters (this takes you back to the risk customization panel).

- **Delete** your customization (and restore the risk score to its default settings).




If you choose to delete your customization, you'll be asked to confirm your choice.



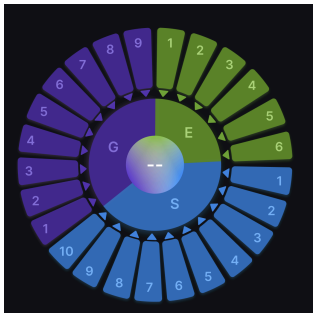

Click **Remove** to continue, or **Cancel** to exit without removing your customization.

## Risk Score Customization Panel

You'll land on this page every time you want to customize your default risk score, or the risk score for specific companies and industries. From here, you can adjust the weighting of risk scores based on the ESG categories and subcategories you want to prioritize.

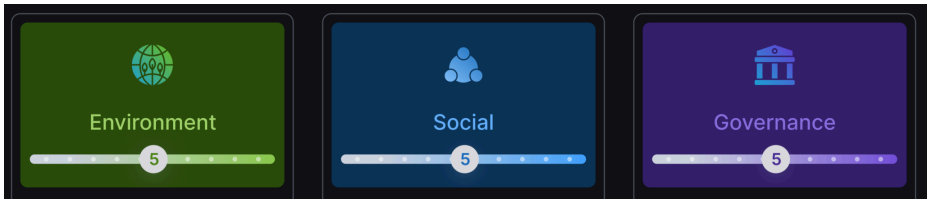
ESG category weights determine how overall risk scores are calculated.

As you adjust these weightings, certain ESG categories and subcategories will have more or less influence on the final score. This is shown by the pie chart (left), which updates to reflect your new weightings as you go.

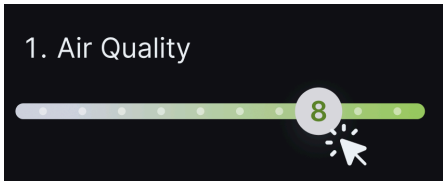



You can adjust all ESG categories on this panel by dragging the scales. These range from 0 to 10, with 10 being the most sensitive weighting.

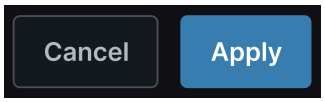
On this panel, you can adjust the three main ESG categories: **Environment, Social, and Governance:**



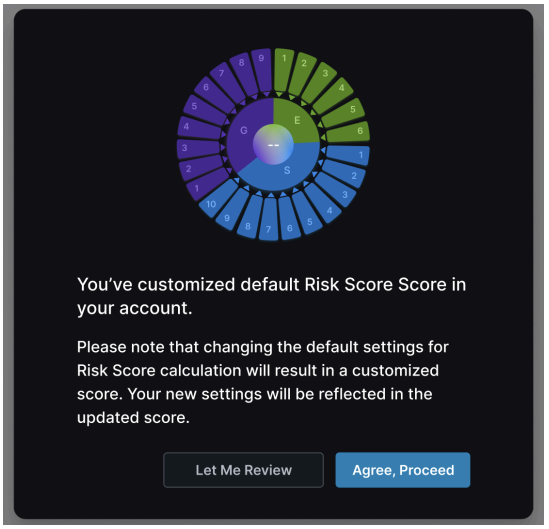

And adjust **ESG subcategories** within each main category:




When you're happy with your new risk score weights, click **Apply** in the bottom-right of the page. Click **Cancel** to exit the screen without saving.




You'll be asked to confirm your decision. Click **Agree, Proceed** to continue or **Let Me Review** to go back and double check your new weights before continuing.

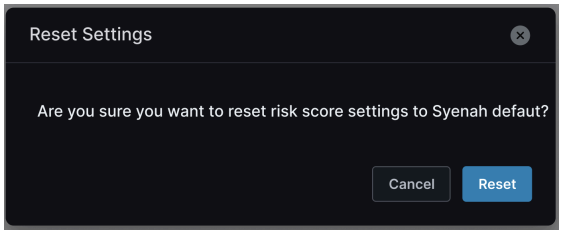



*Note: Changing your default risk score settings will result in a customized risk score across the ESG Sentinel platform.*

## Reset Default Score

If at any point you want to revert back to ESG Sentinel's default risk scoring settings, just click the **Reset to Syenah Default** button.

You'll be asked to confirm your choice. Click **Reset** to continue or **Cancel** to exit without resetting.



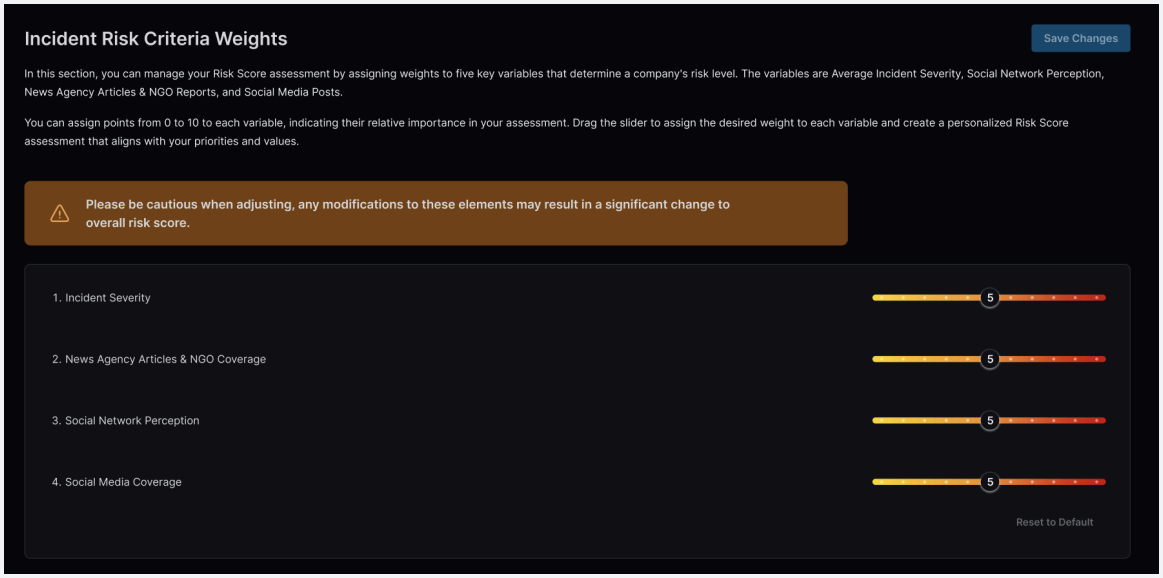

## How to Spot a Customized Risk Score

If you've customized a risk score, it will be marked by a cog symbol on the ESG Sentinel platform.

# Incident Risk Criteria Weight

Rather than [changing risk scores directly](), you can customize how ESG Sentinel *evaluates risk levels* on this page.

Be warned, though – adjusting incident risk criteria can result in a significant change to your overall risk scores across the platform.

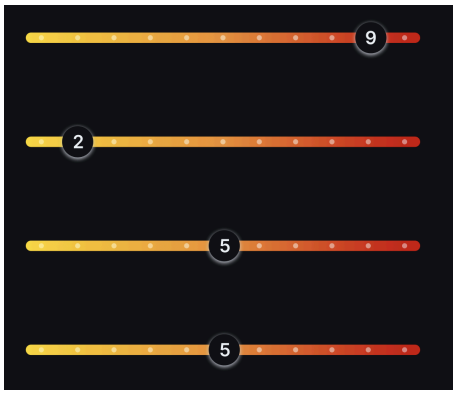



## Customizing Incident Risk Criteria

Incident Risk Criteria on ESG Sentinel are broken down into four categories:

- **Incident Severity**
- **News Agency & NGO Coverage**
- **Social Network Perception**
- **Social Media Coverage**

Each factor has a **sensitivity slider (0-10)**. Higher values mean a greater influence on final risk scores. Move the sliders to select your preferences for each criteria.

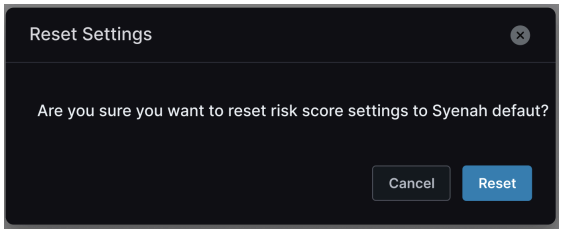



Click **Save Changes** in the top right of the screen to save your customized incident risk criteria.

### Reset Incident Risk Criteria

If at any point you want to revert back to ESG Sentinel's default incident risk criteria settings, just click the **Reset to Default** button.

You'll be asked to confirm your choice. Click **Reset** to continue or **Cancel** to exit without resetting.




## 3.2.2 Severity Scores

The **Severity Score** measures the potential impact of an ESG incident; whether it's a minor issue or a major crisis.

Higher severity scores indicate more serious risks, such as regulatory violations, environmental disasters, or major governance failures. Lower scores apply to less critical incidents, like minor policy infractions or reputational concerns.

### Severity Score Levels

**Minor:** Low impact, minimal disruption.
**Moderate:** Needs monitoring to prevent escalation.
**High:** Significant risk—action required.
**Critical:** Severe crisis with major consequences.

## How are Severity Scores Calculated?

ESG Sentinel calculates an overall Severity score from two other scores: **Severity Impact** and **ESG Category**.

The **Severity Impact** score is based on **seven factors** of an ESG incident:

**1. Reputational Impact:** How much the incident affected a company's reputation.

**2. Incident Scale:** How far-reaching the incident was in terms of geography, industry, or population affected.

**3. Impact Duration:** How long the incident continued to affect the company or stakeholders.

**4. Legal Consequences:** Whether the incident led to legal action, regulatory fines, or compliance violations.

**5. Company Responsibility:** The degree of responsibility the company holds for the incident. If the company is directly at fault, the severity score increases as it shows a failure in internal processes, governance, or oversight.

**6. Financial Impact:** The financial cost of the incident, including damages, fines, or loss of business.

**7. Health and Safety:** The impact on health and safety, such as harm to employees, consumers, or the general public.

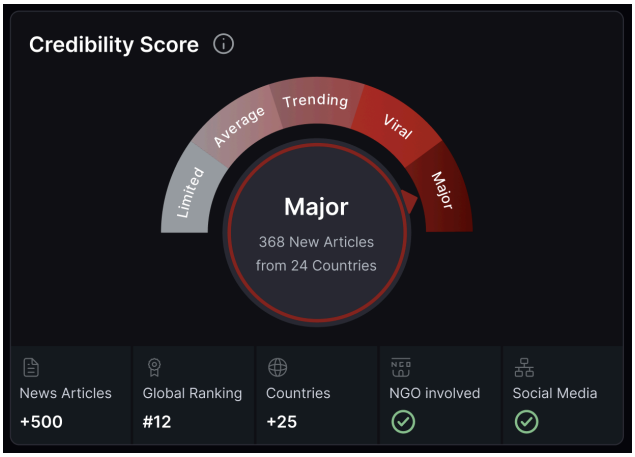
The **ESG Category** score breaks down the incident's impact by each ESG category (environmental, social, and governance), and even further by many sub-categories within each. To give you an idea, these categories can include:

- **Environmental impact** (i.e., climate change, pollution, resource depletion).
- **Social impact** (i.e., labor rights, community impact, human rights)
- **Governance impact** (i.e., regulatory compliance, diversity, ethical business practices).

ESG Sentinel uses both of these scores and their deciding factors to create an overall severity score for ESG incidents.

## 3.2.3 Credibility Scores

ESG Sentinel's **Credibility Score** measures the reliability of the sources reporting an ESG incident. This helps you assess whether the incidents you're tracking are legitimate, significant, and relevant.




The **Credibility Score** is categorized as follows:

**Limited:** The incident is mentioned by few sources, with little public discussion. It may be isolated, and the information may be unverified or unclear.

**Average:** The incident has gained some traction and is being discussed by several sources. However, there may still be questions around its full impact or legitimacy.

**Trending:** The incident is being covered by multiple media outlets, and it's starting to gain attention across social platforms. The incident is growing in visibility but may not yet be widely recognized globally.

**Viral:** The incident has widespread public attention and is being shared rapidly across multiple platforms. Coverage includes major news sources, and the discussion is gaining momentum across multiple regions and sectors.

**Major:** The incident is highly credible, with extensive and continuous coverage from top-tier sources, NGOs, and social media. It has significant implications, potentially affecting multiple industries or regions. This level often signals a large-scale crisis.

The most credible incidents are typically backed by many news outlets, have high severity scores, involve multiple countries, feature NGO involvement, and have strong social media engagement.

# 3.3 Regulations

Staying compliant is easier said than done for many businesses. Regulations are growing stricter year after year, and many now require companies to actively identify, prevent, and report on a wide range of issues; not just within their own operations, but across their supply chains as well. Those who fail to stay diligent risk facing hefty fines and penalties.

ESG Sentinel helps you track non-compliance risks emerging from your investments. The platform provides clear insights on which regulations are being violated, how frequently, the severity of each breach, and any resulting fines or legal actions.

ESG Sentinel monitors several **key industry regulations**, including:

| **German Supply Chain Act (LkSG)** | |
|---|---|
| **Implementation Date** | 2023 |
| **Jurisdiction** | Germany |
| **Scope** | Applies to companies based in Germany with at least 1,000 employees. |
| **Requirements** | Companies must follow eleven international human rights conventions, covering issues like child labor, forced labor, unsafe working conditions, fair wages, and environmental harm. They must work to identify, prevent, and tackle these issues, provide a complaints process, and publish regular reports on their progress. |
| **Fines and Penalties** | - Fines up to €8 million or 2% of global turnover (for companies earning €400M+ annually).<br><br>- Serious breaches can result in exclusion from public contracts.<br><br>- The Federal Office for Economic Affairs and Export Control (BAFA) oversees compliance and has the power to inspect documents, enter premises, and enforce penalties. |

| EU Supply Chain Act (CSDDD) | |
|---|---|
| **Implementation Date** | Enacted in April 2024; full implementation expected by 2027. |
| **Jurisdiction** | European Union (EU) member states. |
| **Scope** | EU companies with 1,000+ employees and €450M+ turnover worldwide, and large non-EU companies with €450M+ turnover in the EU. |
| **Requirements** | Companies must identify, prevent, and address human rights and environmental issues across their own operations and supply chain. Large companies are required to adopt transition plans aligned with the EU's 2050 climate neutrality goals. |
| **Fines and Penalties** | Financial penalties can be up to 5% of a company's net worldwide turnover, and serious breaches can result in exclusion from public contracts.<br><br>*Note: The European Commission is considering simplifying certain aspects of the CSDDD to reduce compliance burdens through its Simplification Omnibus.* |

| UN Global Compact Principles (UNGC) | |
|---|---|
| **Implementation Date** | 2000 |
| **Jurisdiction** | Global |
| **Scope** | Open to companies worldwide, regardless of size or industry. |
| **Requirements** | Companies need to follow ten principles covering human rights, labor standards, environmental protection, and anti-corruption, and to report their progress every year. |
| **Fines and Penalties** | No legal penalties; however, failure to report progress can lead to removal from the UNGC. |

| Sustainable Development Goals (SDGs) | |
|---|---|
| **Implementation Date** | 2015 |
| **Jurisdiction** | Global |
| **Scope** | Open to companies worldwide, regardless of size or industry. |
| **Principles** | 17 goals aiming to end poverty, protect the planet, and ensure prosperity. |
| **Requirements** | Businesses are encouraged to align their strategies with SDGs and contribute through their operations and offerings. |
| **Fines and Penalties** | No legal penalties; adherence is voluntary but encouraged for global sustainability and for improving reputation. |

| **Principal Adverse Impact (PAI)**<br><br>PAIs are the negative effects that investment decisions and advice may have on environmental, social, and governance (ESG) factors. | |
|---|---|
| **Implementation Date** | 2019 |
| **Jurisdiction** | European Union (EU) |
| **Scope** | Financial market participants (FMPs) and financial advisers (FAs) operating within the EU. |
| **Requirements** | FMPs and FAs must disclose (at the entity- and product-level) how they consider PAIs in their investment processes, and make these disclosures available to investors. |
| **Fines and Penalties** | Non-compliance can result in supervisory measures and penalties from regulatory authorities. |

| **Modern Slavery Act** | |
|---|---|
| **Implementation Date** | 2015 |
| **Jurisdiction** | United Kingdom (UK) |
| **Scope** | Applies to businesses with a turnover of £36 million or more operating in the UK. |
| **Requirements** | Companies must look for and tackle modern slavery risks such as abuse, forced labor, and exploitation within their own operations and across their supply chain. They're also required to report annually on their efforts and progress. |
| **Fines and Penalties** | Failure to comply can lead to civil penalties and severe reputational damage. |

# 4 Asset Insights

The **Asset Insights** page is your main dashboard on ESG Sentinel. It gives you a quick overview of ESG risks across your portfolios and holdings (including real-time risk scores, incident reports, and performance metrics) so treat it as a homebase whenever you log in.

Much of this data can also be expanded for more detail or clicked through to reach other ESG Sentinel features; making your Asset Insights page a great launchpad for exploring the rest of the platform.

## 4.1 Overview

At the top of the Asset Insights page, you'll see your total number of portfolios, total number of companies across all your portfolios, and the average ESG risk score of your portfolios.

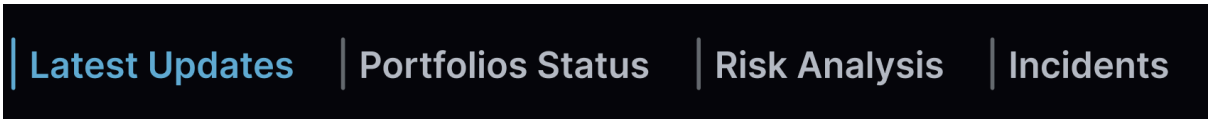
**Haven't Created a Portfolio?**
If you haven't created a portfolio yet, the Asset Insights page will be empty. To start receiving data, create a portfolio.

### 4.1.1 Asset Insights Toolbar

| | | |
|---|---|---|
| **Search for a Company** | Use the search bar at the top of the Asset Insights page to search for a company and view their details. | Search company |
| **Generate Report** | Click the **Generate Report** button in the top-right of your Asset Insights page to generate a report of the overall ESG performance of your portfolios. | Generate Report |

You can navigate your **Asset Insights** using four main tabs, located at the top of the page. These include:

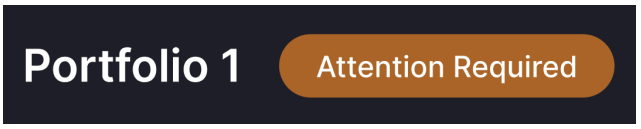
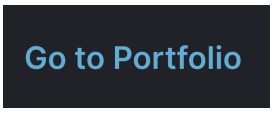
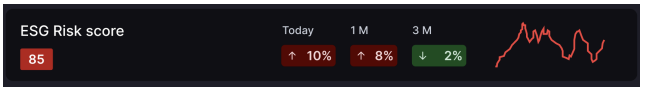
- Latest Updates
- Portfolios Status
- Risk Analysis
- Incidents

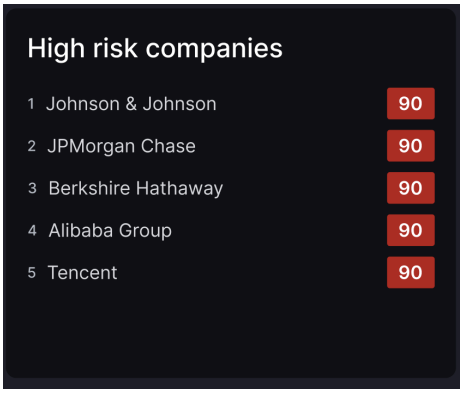
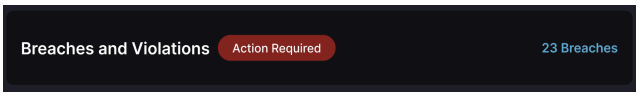



Click on a tab to jump ahead, or just scroll down the page—all tabs are listed as dropdown options.

## 4.2 Latest Updates

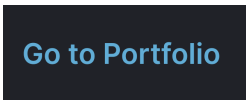
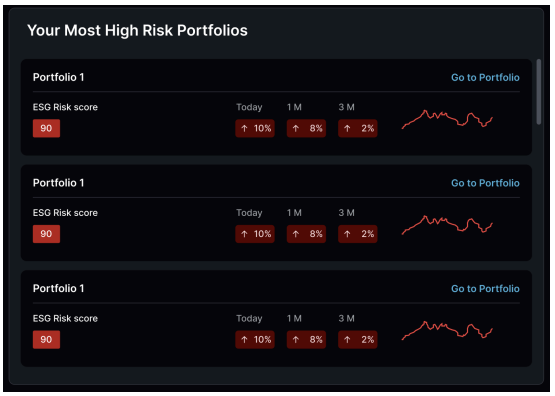
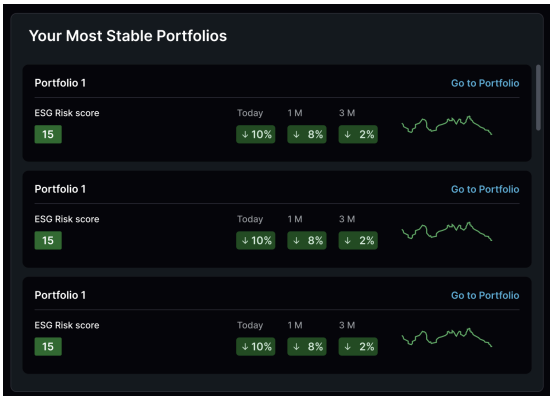
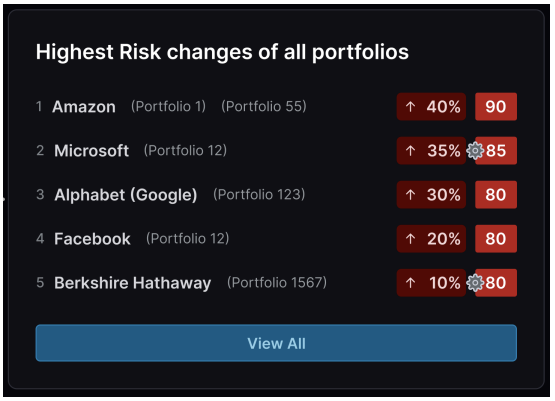
This section shows the latest ESG risk, performance, and incident updates from your portfolios in the last 24 hours.

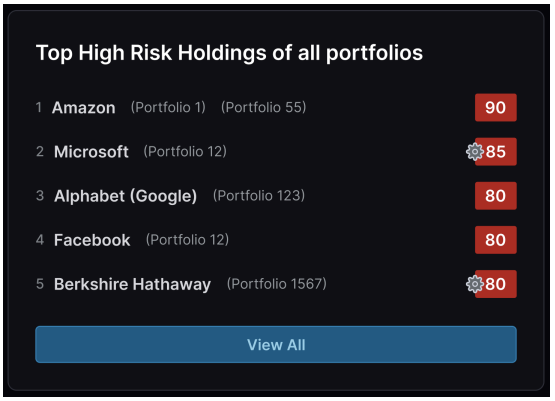
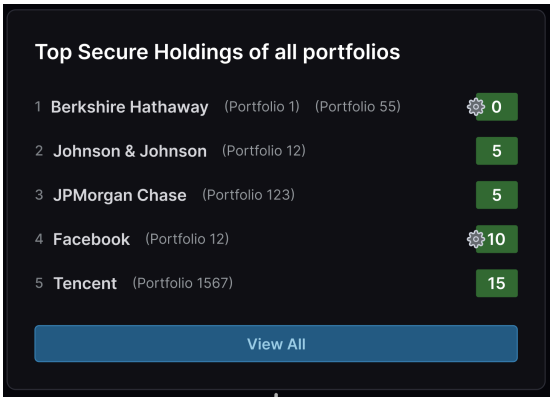
| | | |
|---|---|---|
| **Attention Required** | If you see the **Attention Required** label, it's because your portfolio has triggered one of your ESG risk/incident alerts. |   |
| **Go to Portfolio** | Click **Go to Portfolio** in the top right of each data box to open the full Portfolio. |   |
| **ESG Risk Score** | This displays your portfolio's ESG risk score, along with its risk change percentage over the past day, month, and three months. |   |
| **Highest Risk Changes** | This list reveals which companies in your portfolios have had the greatest increase in ESG Risk score.<br><br>The dark red bar shows the percentage increase, and the red box displays their current ESG risk score | |

| | | |
|---|---|---|
| **High Risk Companies** | This list shows the companies in each portfolio with the highest ESG risk scores. |  |
| **Breaches and Violations** | This section tells you how many regulatory breaches have occurred within each portfolio.<br><br>If you see the **Action Required** label, it's because your portfolio has triggered one of your breach alerts.<br><br>Click on the breach counter to open your full Breach List. |  |
| **Recent Critical Incidents** | This feed displays the latest incidents related to your portfolio that have **Critical** ESG Risk scores.<br><br>The feed provides the headline of the incident and a timestamp for when it occurred. | |
| **View More** | The **Latest Updates** section shows your first three updated portfolios.<br><br>Click **View More** to expand this section and see updates for up to five more portfolios, if available. | |

## 4.3 Portfolios Status

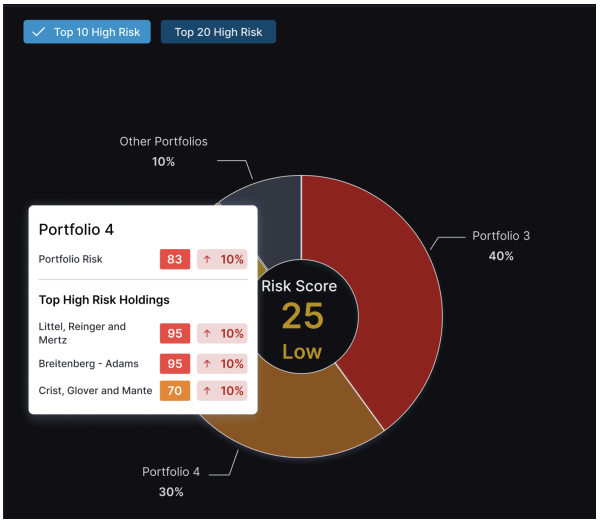
This section gives an overview of your portfolios' ESG performance and risk scores.

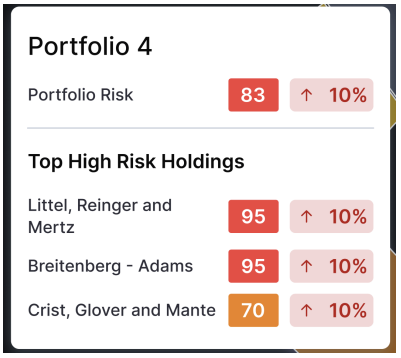
| | | |
|---|---|---|
| **Go to Portfolio** | Click **Go to Portfolio** in the top right of each data box to open the full Portfolio. |  |
| **Customized Risk Scores** | If you've customized a company's risk score, you'll see a cog symbol next to it in this section. | |
| **Your Most High Risk Portfolios** | This section shows your riskiest portfolios based on their ESG risk score. These portfolios have high risk scores and/or their risk scores are increasing.<br><br>Each portfolio's ESG risk score is displayed here, along with its risk change percentage over the past day, month, and three months. |  |
| **Your Most Stable Portfolios** | This section shows your most stable portfolios based on their ESG risk scores. These portfolios have low risk scores and/or their risk scores are decreasing.<br><br>Each portfolio's ESG risk score is displayed here, along with its risk change percentage over the past day, month, and three months. |  |
| **Highest Risk Changes of all Portfolios** | **1.** This section lists the companies across all your portfolios with the biggest increase to their ESG risk scores.<br><br>It lists the company's name, portfolio number(s), risk score increase as a percentage, and current ESG risk score.<br><br>Click **View All** to open your Holdings List. |  |

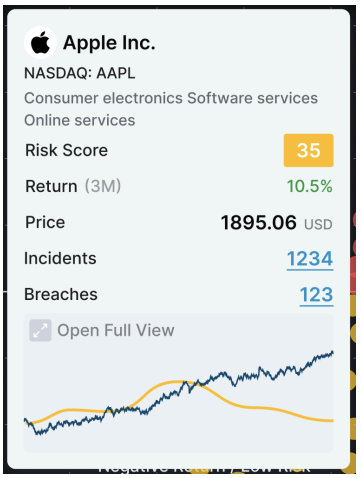
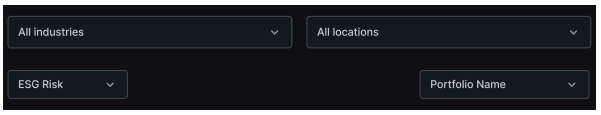
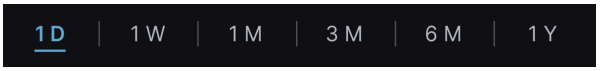
| | | |
|---|---|---|
| **Top High Risk Holdings of all Portfolios** | This shows the companies across all your portfolios with the highest ESG risk scores.<br><br>It lists the company name, portfolio number/s the company is in, and its current ESG risk score.<br><br>Click **View All** to see this data in more detail in your Holdings List. |  |
| **Top Secure Holdings of all Portfolios** | This shows the companies across all your portfolios with the lowest ESG risk scores.<br><br>It lists the company name, portfolio number/s the company is in, and its current ESG risk score.<br><br>Click **View All** to see this data in more detail in your Holdings List. |  |

## 4.4 Risk Analysis

This section breaks down the ESG risk levels of your portfolios.

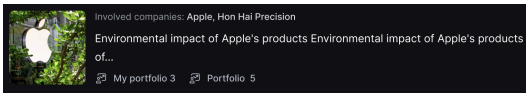
| | | |
|---|---|---|
| **Portfolio ESG Risk Score** | **1.** This pie chart shows which of your portfolios have the highest ESG risk levels.<br><br>• The **center** of the pie shows the total risk score of all your portfolios combined.<br><br>• The **sections** of the pie show each portfolio's contribution to the overall risk score, with colors indicating the ESG risk level. | **1.**<br>  <br>*Use the toggle above to view data for the top 10 or top 20 portfolios with the highest risk scores.* |

| | | |
|---|---|---|
| | **2.** Hover over each section to see the ESG risk score and risk change percentage for the portfolio, as well as for the riskiest holdings within it. | **2.**<br>  <br> |
| **Clustering Analysis** | **1.** This cluster diagram organizes your portfolios by ESG risk level and return.<br><br>The X and Y axes show return levels as percentages, from 100% to -100%.<br><br>**2.** The circles represent companies within a portfolio. They're color coded by their ESG risk level, as shown by the key.<br><br>**3.** Hover over a company on the diagram to see its:<br><br>- Ticker symbol<br>- Bio<br>- Risk score<br>- Return | **1.**<br> <br> |

| | | |
|---|---|---|
| | - Stock price<br>- Number of incidents (click to open your Incident List)<br>- Number of breaches (click to open your Breach List)<br>- Risk score vs. stock price chart (click **Open Full View** to see an expanded version) | **2.**<br> <br><br>**3.**<br>  <br> |
| | **4.** Use the dropdown menus to filter the data by industry, location, ESG risk category and subcategory, and portfolio name.<br><br>**5.** Adjust the time range for the data using the toolbar at the top.<br><br>**6.** Expand the cluster diagram by clicking the expand button in the top right. | **4.**<br>  <br><br>**5.**<br>  <br><br>**6.**<br> |

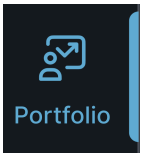
## 4.5 Incidents

This section provides a real-time feed of the latest incidents with a **Critical ESG Risk score** related to your portfolio. Each incident includes the following details:

| | | |
|---|---|---|
| **Incidents since last login** | This number shows how many **Critical** incidents have appeared in the feed since your last login to ESG Sentinel. | Recent Critical Incidents<br>All critical incidents from your last login: **56** |
| **Involved companies** | This tells you which companies from your portfolio(s) are involved in the incident. | Involved companies: **Apple, Hon Hai Precision** |
| **Summary** | This provides a short headline or summary of what happened, along with a related image, if available. |  |
| **Portfolio links** | These links show which of your portfolios are connected to the incident. Click on a link to open your full portfolio. | My portfolio 3 Portfolio 5 |
| **Time stamp** | This indicates how long ago the incident was added to your feed. | (1 hour ago) |

# 5 Portfolio

When your portfolio holdings face ESG risks such as incidents, sanctions, and regulatory breaches, your investments will inevitably feel the impact.




ESG Sentinel's **Portfolio** feature helps you gain crucial visibility over these risks early on, letting you upload, manage, and track all of your holdings and portfolios from one place and gain key insights into their ESG performance levels.

This way, you can make smarter decisions, stay ahead of regulations, and build a portfolio that's both resilient and aligned with what clients and stakeholders expect.

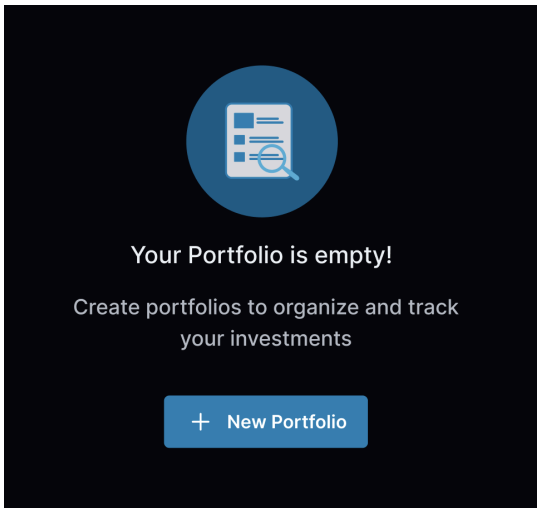
From this feature you can:

- Create a Portfolio
- View incoming ESG risk intelligence for a portfolio
- Edit a portfolio
- Manage your portfolio collection

## 5.1 Creating a Portfolio

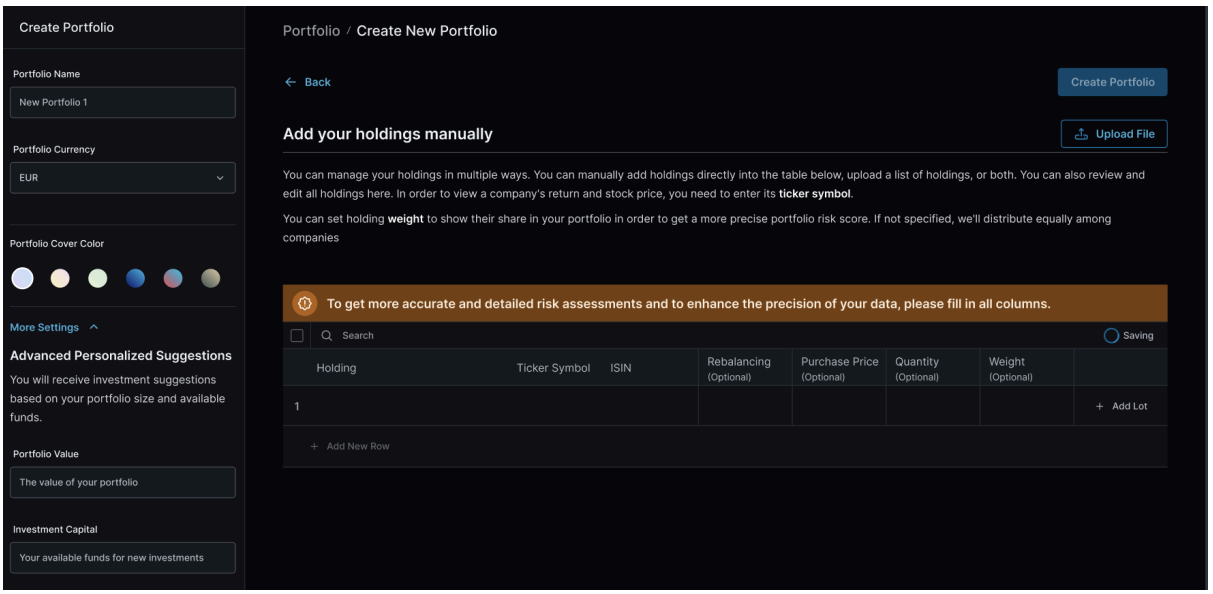
If it's your first time opening the Portfolio feature on ESG Sentinel, the page will be empty.

Click **New Portfolio** to get started.



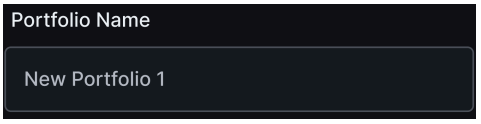
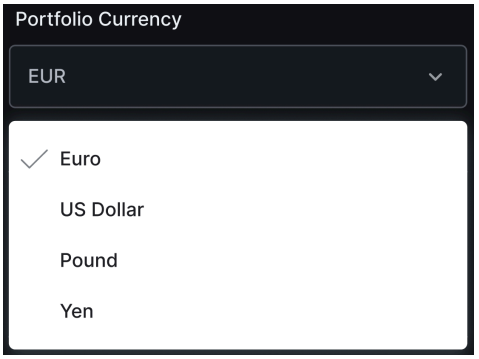
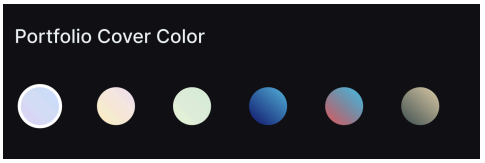

If you've already created a portfolio/s, and you want to create another, click the **Create New Portfolio** button in the top right of the page.

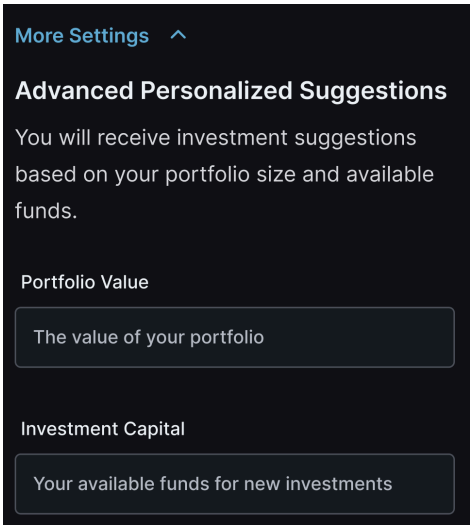
Both buttons bring you to the portfolio creation page. Here, you can name your portfolio, choose a currency, and manage your holdings.




## 5.1.1 Adding Portfolio Details

Start by entering your portfolio details in the left-hand column of the portfolio creation screen.

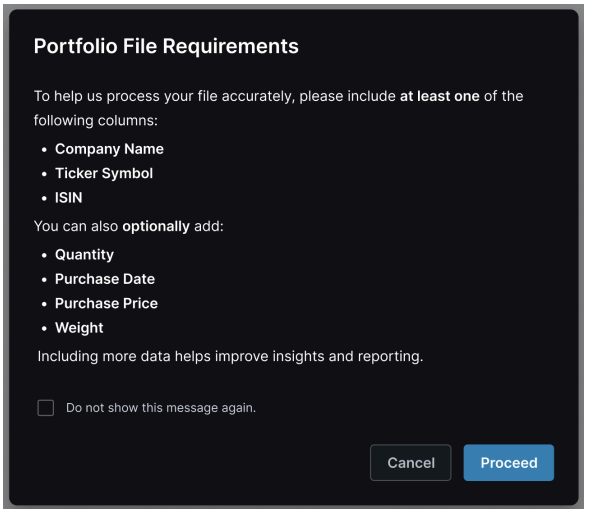
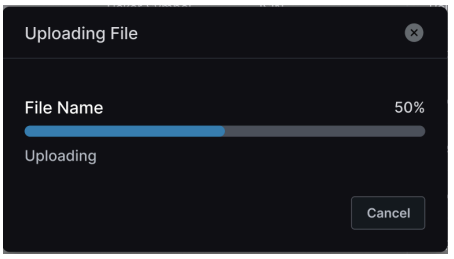
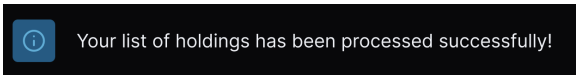
| | | |
|---|---|---|
| **Portfolio Name** | Give your portfolio a name by typing it into the field provided.<br><br>If you leave this blank, ESG Sentinel will use a default name like "New Portfolio 1," "New Portfolio 2," and so on. |  |
| **Portfolio Currency** | Choose the currency you want your portfolio to be displayed in from the dropdown menu. |  |
| **Portfolio Cover Color** | Choose a cover color for your portfolio. Other than making it look nice, this will help you quickly distinguish your portfolio from others on ESG Sentinel. |  |

| | | |
|---|---|---|
| **More Settings** | If you'd like personalized **investment suggestions** from ESG Sentinel for your portfolio, fill out this dropdown section.<br><br>Enter your portfolio size and available funds, and ESG Sentinel will tailor recommendations for you. |  |

## 5.1.2 Adding Holdings to your Portfolio & Saving

You can add holdings to your portfolio by **uploading a file** or by **manually** editing your Holdings List.

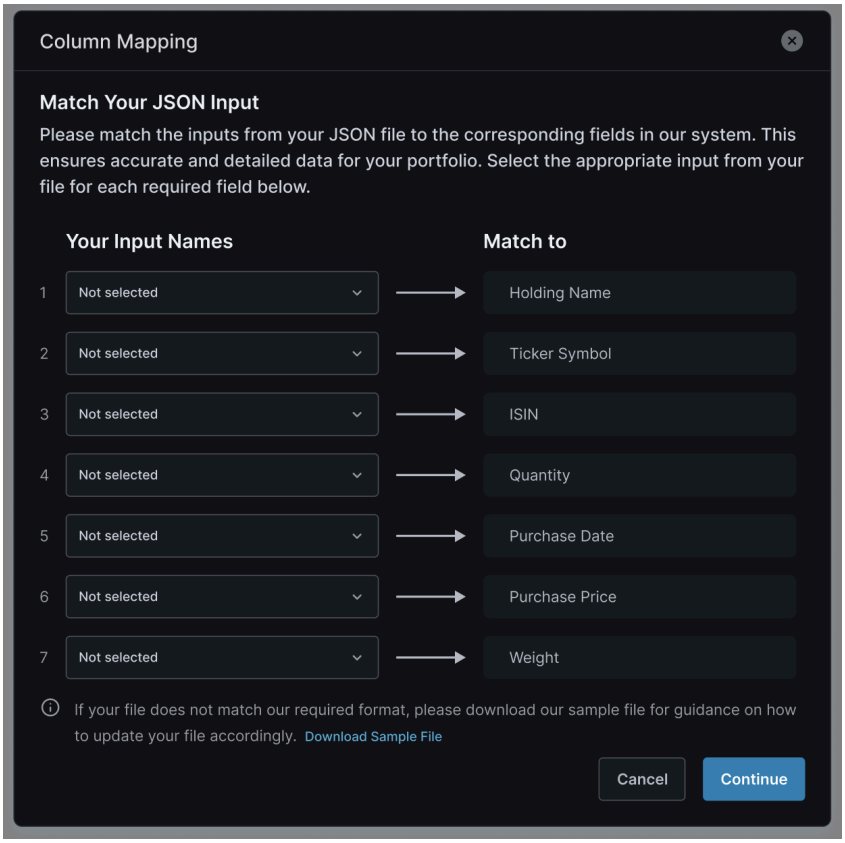
| Adding Holdings from File | | |
|---|---|---|
| **Upload File** | **1.** Select **Upload File** in the top right-hand corner of the screen.<br><br>This opens a dropdown menu where you can upload your supply chain data using a CSV, XLSX, or JSON file.<br><br>**2.** Select the file type you want to upload.<br><br>**2a.** Click **Download Sample** if you'd like to see an example of how each file type should look before being uploaded to ESG Sentinel. | **1.**<br> <br>**2.**<br> <br>**2a.**<br> |

| | | |
|---|---|---|
| | **3.** A pop-up screen will appear with the requirements for your file.<br><br>Make sure the portfolio file you upload to ESG Sentinel includes the listed information to avoid any errors down the line.<br><br>*Note: Check the **Do not show this message again** box to stop this screen appearing the next time you upload a supply chain file.*<br><br>Click **Proceed** when you're ready to upload your Portfolio file, or **Cancel** to exit.<br><br>**4.** Once you've selected a file type, your system's browser will open.<br><br>Choose the file on your system that you want to upload – this will take you back to ESG Sentinel, and a progress bar will show your file's upload status.<br><br>**File won't upload?** Or **Some of your companies not recognized?** See the Troubleshooting section. |  <br>**4.**<br>  |
| **Success** | If the upload is successful, you'll get an alert. |  |

## Adding Holdings from File: Column Mapping

When uploading portfolio holdings from a file, you need to map the input to the correct columns so that ESG Sentinel can accurately display your **Holdings List**.

*Note: To see a company's return and stock price, enter its ticker symbol.*




*"Match Your JSON Input" is an example. This header will change depending on the file type you upload.*

Use the dropdowns on the left to match your file data with the correct fields on the right.

*Note: Each holding must have at least a name, ticker symbol, or ISIN.*

If mapping is successful, green check marks will appear next to the fields.

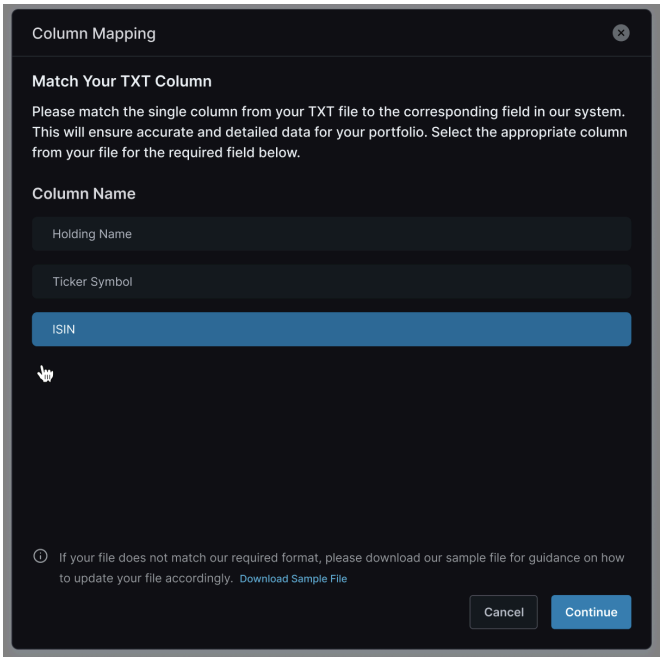
Click **Continue** to confirm your selections and save your portfolio, or **Cancel** to exit.

### Adding Holdings from TXT File: Column Mapping

If you're uploading your holdings via TXT file, click the column name that matches the single column in your TXT file.

You have three options: **Holding Name**, **Ticker Symbol**, or **ISIN**.

*Note: To see a company's return and stock price, enter its ticker symbol.*




Click **Continue** to confirm your selection or **Cancel** to exit.

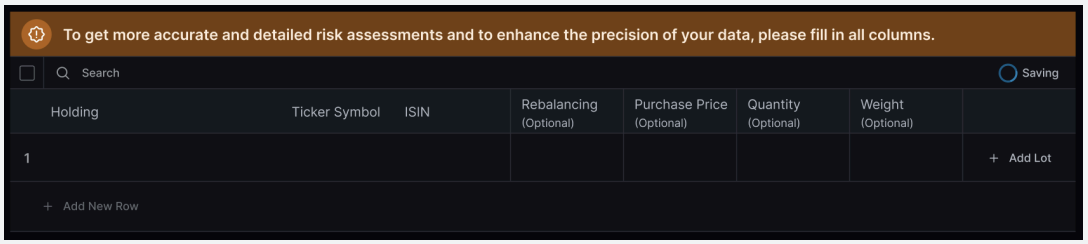
### Saving your Portfolio

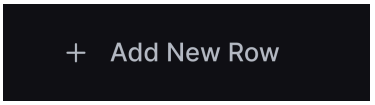
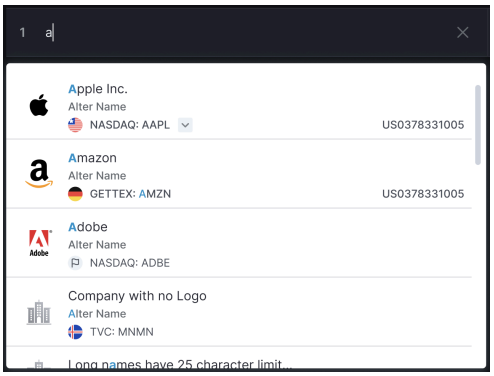
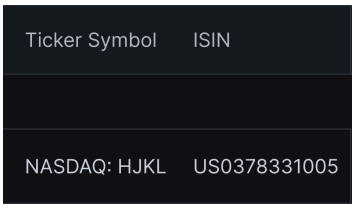
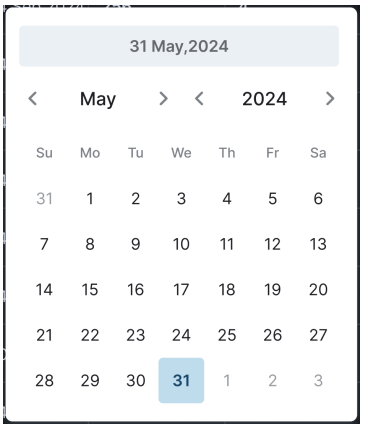
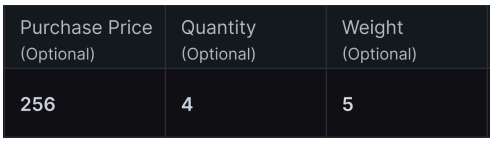
When you're happy with your holdings, click the **Create Portfolio** button in the top right hand corner of the screen to finalize your portfolio and add it to your collection.

You'll get an alert to say that the creation is successful.

## 5.2 Editing your Portfolio

You can edit your portfolio and manually add new companies from your Holdings List.

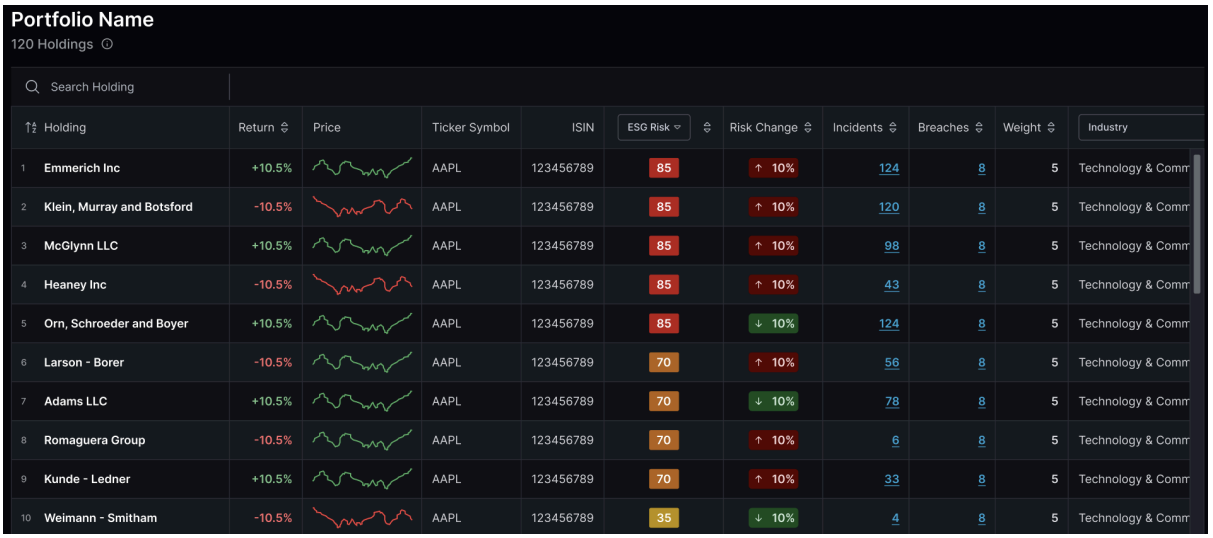


| | | |
|---|---|---|
| **Add New Row** | Click the **Add New Row** button at the bottom of the list. |  |
| **Find Company** | Type the company name into the search field and select it from the dropdown when it appears. |  |
| **Ticker Symbol and ISIN** | Enter the company's ticker symbol and ISIN code in the fields provided.<br><br>*Note: To see the company's return and stock price, you must include the ticker symbol.* |  |
| **More Info (Optional)** | **1.** Set the rebalancing date for your holding using the date picker. The calendar will appear after you click the section.<br><br>**2.** Enter the purchase price, quantity, and weight of your holding in the fields provided.<br><br>*Note: These metrics are optional; but filling them in will provide more accurate data and detailed risk assessments.* | **1.**<br> <br>  <br>**2.**<br>  |

| | | |
|---|---|---|
| **Add New Lot** | Click the **Add Lot** button at the end of the row to add more lot data to your holding. | + Add Lot |
| **Saving** | Click the **Save Changes** button (top-right) after editing your portfolio to save it. | Save Changes |

## 5.3 Holdings List

Your **Holdings List** provides a real-time feed of your holdings in each portfolio, including key stock price, ESG risk, incident, and breach data. Whenever you click to see more details about your holdings from one of your portfolios, you'll be brought here.



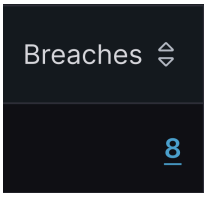
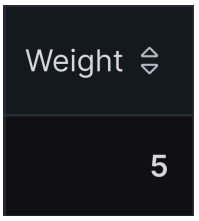
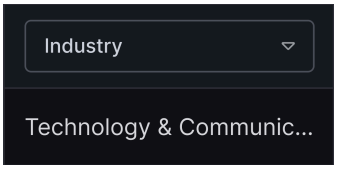
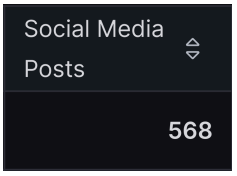

| Holding | Return | Price | Ticker Symbol | ISIN | ESG Risk | Risk Change | Incidents | Breaches | Weight | Industry |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 Emmerich Inc | +10.5% | | AAPL | 123456789 | 85 | ↑ 10% | 124 | 8 | 5 | Technology & Comm |
| 2 Klein, Murray and Botsford | -10.5% | | AAPL | 123456789 | 85 | ↑ 10% | 120 | 8 | 5 | Technology & Comm |
| 3 McGlynn LLC | +10.5% | | AAPL | 123456789 | 85 | ↑ 10% | 98 | 8 | 5 | Technology & Comm |
| 4 Heaney Inc | -10.5% | | AAPL | 123456789 | 85 | ↑ 10% | 43 | 8 | 5 | Technology & Comm |
| 5 Orn, Schroeder and Boyer | +10.5% | | AAPL | 123456789 | 85 | ↓ 10% | 124 | 8 | 5 | Technology & Comm |
| 6 Larson - Borer | -10.5% | | AAPL | 123456789 | 70 | ↑ 10% | 56 | 8 | 5 | Technology & Comm |
| 7 Adams LLC | +10.5% | | AAPL | 123456789 | 70 | ↓ 10% | 78 | 8 | 5 | Technology & Comm |
| 8 Romaguera Group | -10.5% | | AAPL | 123456789 | 70 | ↑ 10% | 6 | 8 | 5 | Technology & Comm |
| 9 Kunde - Ledner | +10.5% | | AAPL | 123456789 | 70 | ↑ 10% | 33 | 8 | 5 | Technology & Comm |
| 10 Weimann - Smitham | -10.5% | | AAPL | 123456789 | 35 | ↓ 10% | 4 | 8 | 5 | Technology & Comm |

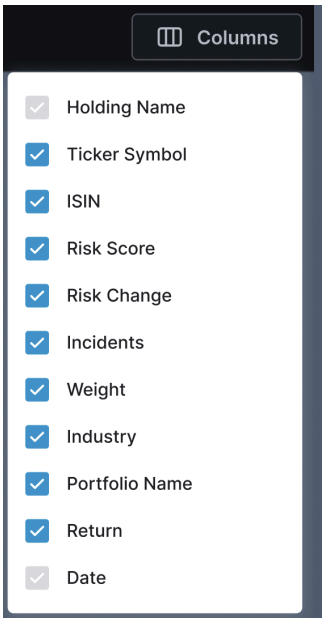
*This list will be ordered depending on the chart you click through on from your **Portfolio Page**, such as by Top High Risk Holdings or Top Secure Holdings.*

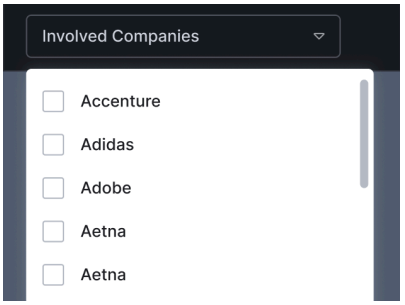
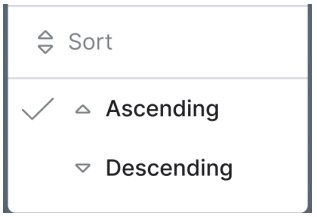
| **Navigating Your Holdings List** | | |
|---|---|---|
| **Holdings Count** | Underneath the name of your portfolio, you'll see the total number of holdings in your list.<br><br>Hover over the "i" symbol to see a detailed list of the filters applied to your Holdings List. | Portfolio Name<br>120 Holdings ⓘ |
| **Holdings Search Bar** | Use the holdings search bar (top-right) to find specific holdings in your Holdings List. | Search Holding |

| **Holdings List: Column Breakdown** |
|---|

| | | |
|---|---|---|
| **Holding Title** | Displays the name of the company. | Holding<br>1 Emmerich Inc |
| **Return** | This column shows the company's return rate as a percentage. | Return<br>+10.5% |
| **Price** | This column shows a simple line graph of the company's stock price change over time. | Price |
| **Ticker Symbol** | Shows the company's ticker symbol. | Ticker Symbol<br>AAPL |
| **ISIN** | Shows the company's ISIN code. | ISIN<br>123456789 |
| **ESG Risk** | This column shows the company's current ESG risk score. | ESG Risk<br>85 |
| **Risk Change** | This column shows the company's color-coded ESG risk change as a percentage. | Risk Change<br>↑ 10% |
| **Incidents** | This column shows many ESG incidents the company has been involved in.<br><br>Click on the incident counter to open your Incident List. | Incidents<br>124 |

| | | |
|---|---|---|
| **Breaches** | This column shows how many regulatory breaches the company has committed.<br><br>Click on the breach counter to open your Breach List. |  |
| **Weight** | This column shows the company's weight in the portfolio, representing its proportion relative to other holdings. |  |
| **Industry** | This column shows the industry the company belongs to. |  |
| **Social Media Posts** | This column shows how many social media posts the company has been mentioned in. |  |

| **Holdings List: Filters** | | |
|---|---|---|
| **Columns** | This option lets you pick which columns to display in your Holdings List.<br><br>Check the boxes for the information you want to see.<br><br>*Note: You can't unselect the **Holding Name** or **Date** columns.* |  |
| **Dropdown Filters** | **1.** To filter the data in your Holdings List, use the dropdown menus at the top of each column. You can filter by | **1.** |

| Holdings List: Filters | | |
|---|---|---|
| | Each dropdown menu will display a list of filters. Check the boxes to select the information you want to appear under each column.<br><br>**2.** For the **ESG Risk** column filter, you can choose to sort the data in ascending order (highest risk score first) or descending order (lowest risk score first). |  <br>**2.**<br>  |
| **Clear Filters** | Click on this button to clear all the filters you currently have applied to your Holdings List. | |

## 5.3 Navigating Your Portfolio Page

Your **Portfolio Page** is where you'll receive detailed ESG risk and performance insights about a particular portfolio.

At the top of page is your portfolio name and its number of Holdings, its ESG Risk score, its number of incidents and breaches occurring within it.

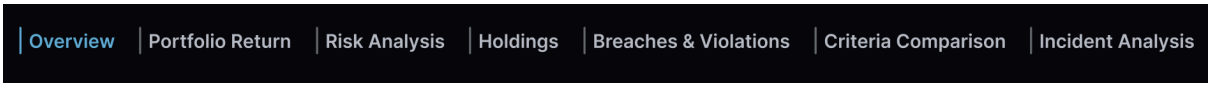
Click the edit button to change your portfolio's name.

You can navigate your **Portfolio Page** using five main tabs, located at the top of the page.

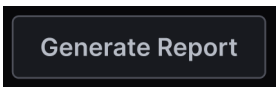
These include:

- Overview
- Portfolio Return

- Risk Analysis
- Holdings
- Breaches & Violations
- Criteria Comparison
- Incident Analysis




Click on a tab to jump ahead, or just scroll down the **Overview** page—all tabs are listed here as dropdown options.

| **Portfolio Page: Tools** | | |
|---|---|---|
| **Generate Report** | Click the **Generate Report** button in the top-right of your **Portfolio Page** to generate a report of the ESG performance of your portfolio. |   |
| **Add Alert** | Click **Add Alert** button to create an alert for your Watchlist information.<br><br>*Learn more about creating alerts in the Alert Center section.* | |
| **Customize Risk Score** | Click **Customize Risk Score** to customize the ESG Risk score of your portfolio. | |

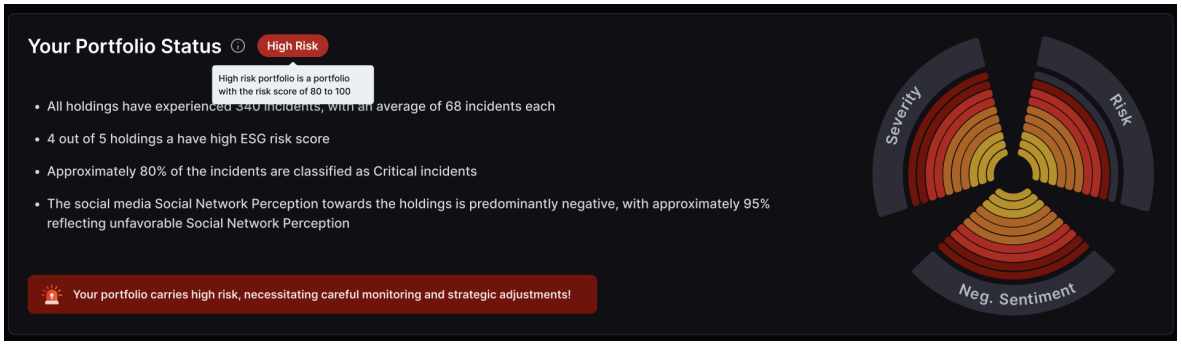
## 5.3.1 Overview

The **Overview** section of your Portfolio Page is where you'll find any updates on portfolio alerts you've set up, as well as your Portfolio Status, which provides a snapshot of the ESG performance of your portfolio.

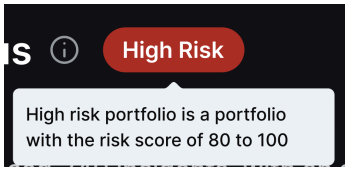
If you have any updates about alerts you've set up for your portfolio, you'll be notified about them here, at the top of the page. Click **View Alert Updates** to see these in your Alert Center.

### Portfolio Status

This section provides a summary of your portfolio's ESG performance and risk level.

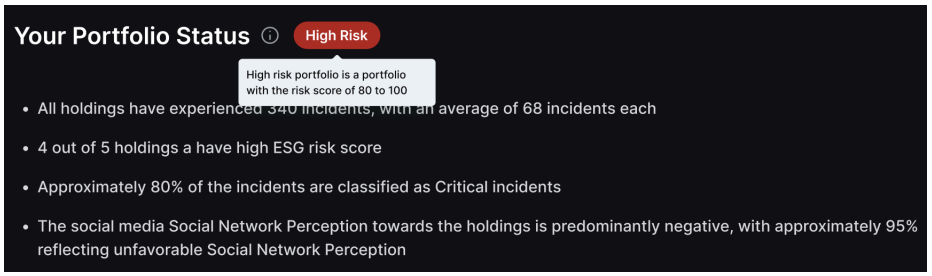



**ESG Risk Score:** This label shows your portfolio's overall ESG risk score. Hover over it to view the score out of 100.




**Summary:** This summary explains why your portfolio has its current risk score.

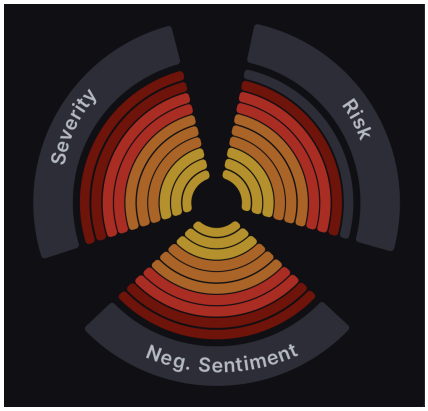
This may include details about incidents, breaches, the risk scores of individual holdings, and social media sentiment related to your portfolio and its holdings.



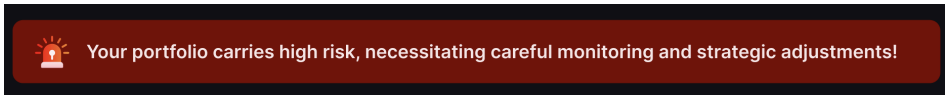

**Risk Chart:** This pie chart visualizes your portfolio's status, displaying risk levels based on three key metrics:

- **Severity** (of incidents)
- **Risk** (ESG risk level)
- **Negative Sentiment** (from social media)

The bars for each metric are color-coded by risk level.

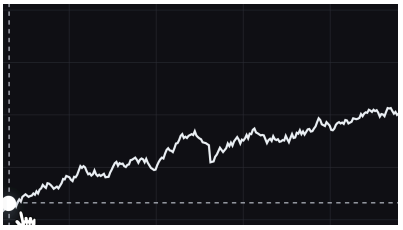


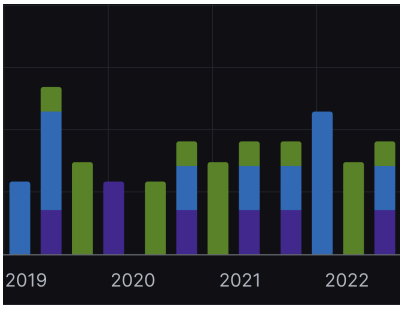
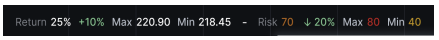
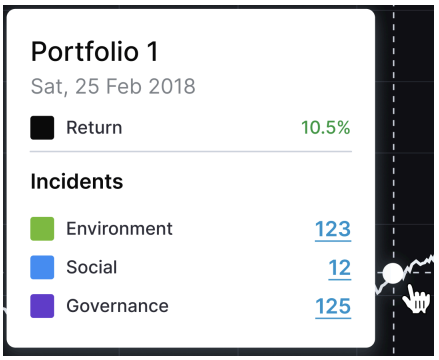
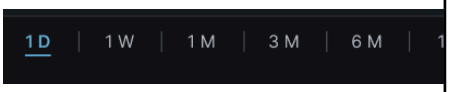
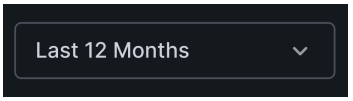

**Risk Alert:** ESG Sentinel can provide tips and warnings for your portfolio, depending on its ESG risk score.




## 5.3.2 Portfolio Return

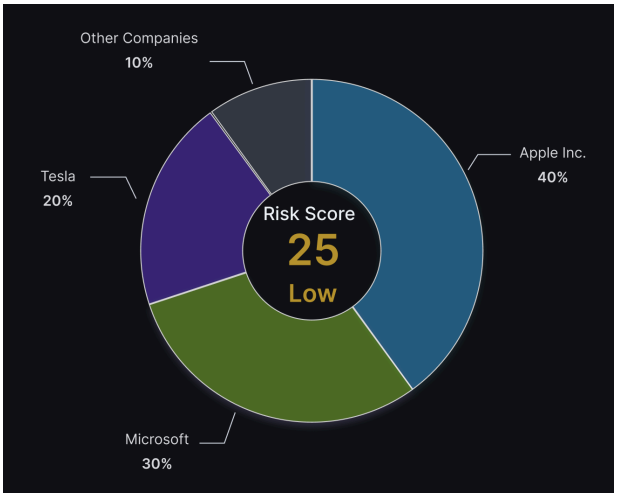
This chart tracks the relationship between your portfolio's return and the number/frequency of ESG incidents over time. It helps illustrate how incidents involving your holdings may impact your portfolio's return.

| | | |
|---|---|---|
| **Return Level** | The white line shows your portfolio's return level, plotted against the X axis (year) and Y axis (incident number). |  |

| | | |
|---|---|---|
| **ESG Incidents** | The bar chart shows the number of ESG incidents (color-coded by category), plotted against the X axis (year) and Y axis (incident number). |  |
| **Volume** | This graph provides a simplified view of your portfolio's return over time. | |
| **Chart Details** | The info bar shows your portfolio's:<br><br>- Return (as percentage)<br>- Return change (as percentage)<br>- Maximum and minimum price<br>- ESG risk score<br>- ESG risk score change (as percentage)<br>- Maximum and minimum risk score |  |
| **Hover** | Hover over the chart to see your portfolio's return percentage and ESG incident count (by category) on a certain date.<br><br>Click on an incident category counter to open your Incident List. |  |
| **Time Range Filter** | Adjust the time range for this data using the toolbar above. |  |
| **Specific Time Range Filter** | To select a more specific time range or date, choose an option from the dropdown menu in the top-right hand corner. |  |
| **Expand** | Click on the **expansion icon** in the top right-hand corner to see the full version of this chart. | |

## 5.3.3 Risk Analysis

This pie chart shows your portfolio's overall ESG risk score (center) and breaks down which high-risk companies in the portfolio are contributing the most to this score.

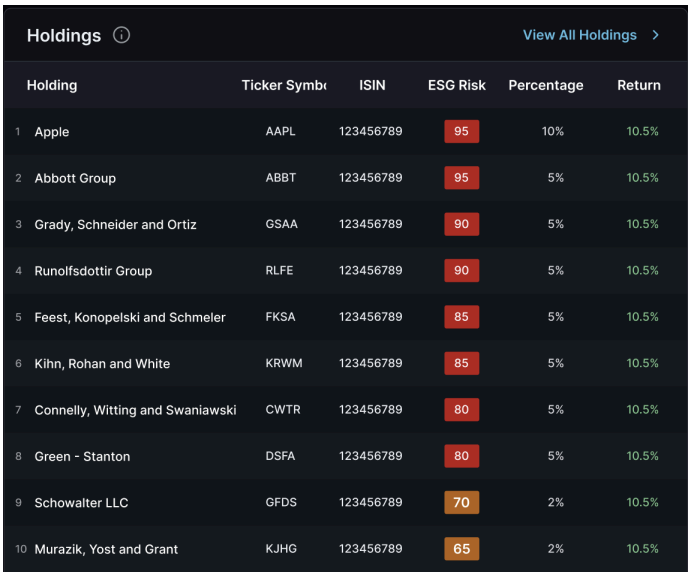



Use the toggle above to view data for the top 10 or top 20 portfolios with the highest risk scores.

## 5.3.4 Holdings

This section ranks your portfolio holdings by those with the highest ESG risk score.

Each row includes the company name, ticker symbol, ISIN number, ESG risk score, percentage of your portfolio, and return percentage.



Holdings

View All Holdings

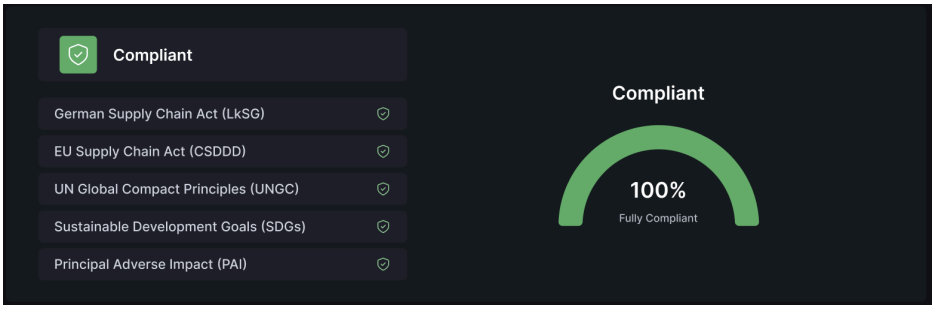
| | Holding | Ticker Symbo | ISIN | ESG Risk | Percentage | Return |
|---|---|---|---|---|---|---|
| 1 | Apple | AAPL | 123456789 | 95 | 10% | 10.5% |
| 2 | Abbott Group | ABBT | 123456789 | 95 | 5% | 10.5% |
| 3 | Grady, Schneider and Ortiz | GSAA | 123456789 | 90 | 5% | 10.5% |
| 4 | Runolfsdottir Group | RLFE | 123456789 | 90 | 5% | 10.5% |
| 5 | Feest, Konopelski and Schmeler | FKSA | 123456789 | 85 | 5% | 10.5% |
| 6 | Kihn, Rohan and White | KRWM | 123456789 | 85 | 5% | 10.5% |
| 7 | Connelly, Witting and Swaniawski | CWTR | 123456789 | 80 | 5% | 10.5% |
| 8 | Green - Stanton | DSFA | 123456789 | 80 | 5% | 10.5% |
| 9 | Schowalter LLC | GFDS | 123456789 | 70 | 2% | 10.5% |
| 10 | Murazik, Yost and Grant | KJHG | 123456789 | 65 | 2% | 10.5% |

Click **View All Holdings** to open your Holdings List.

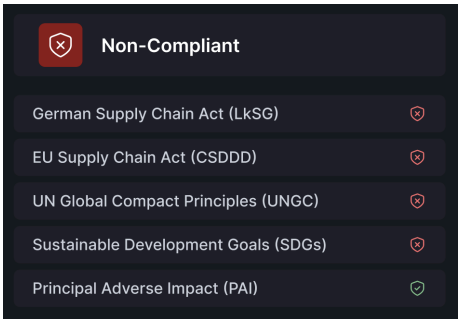
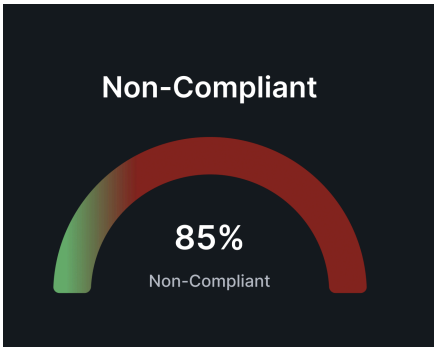
## 5.3.5 Breaches & Violations

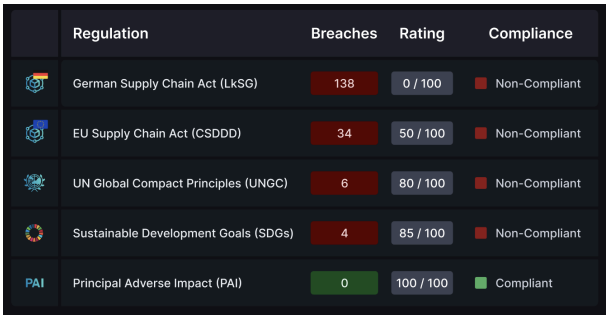
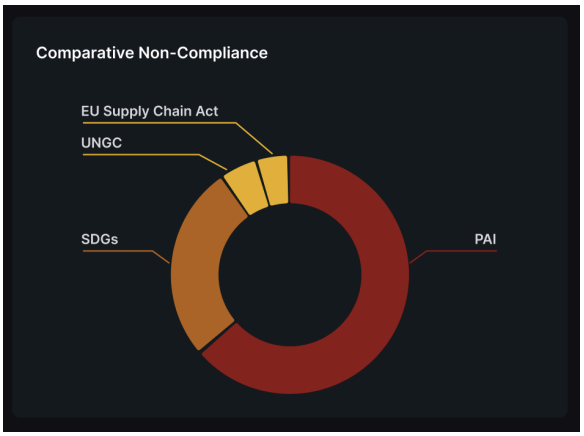
This tab shows whether your portfolio is breaching key industry regulations. If it's non-compliant in some way, this section reveals the severity of the breaches, the regulations and principles violated, and more specific breach details.

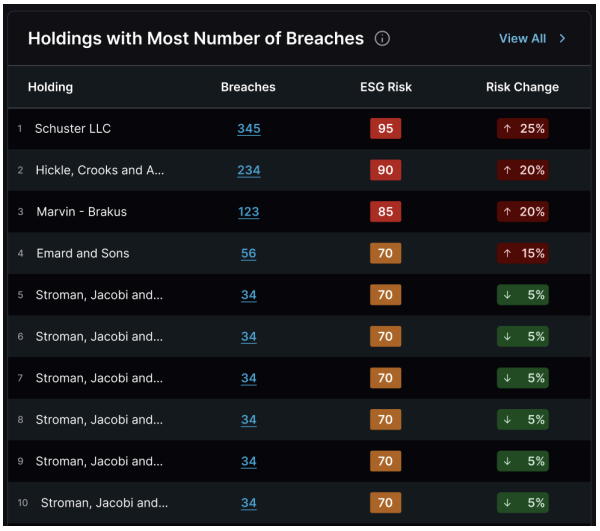
***Fully Compliant?*** *If your portfolio is fully compliant, you'll only see the overview of the compliance level and compliant regulations. The rest of the sections in this tab will not appear.*




If your portfolio is non-compliant in some way, the **Breaches & Violations** tab will expand to show two key sections: **Regulatory Compliance** and **Breach Overview**.

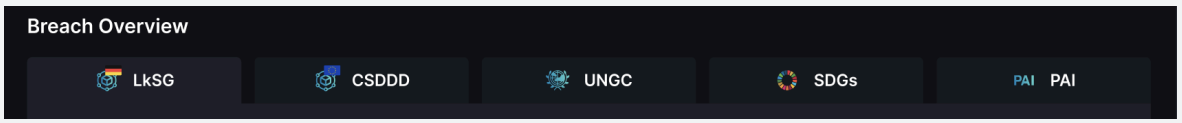
| **Regulatory Compliance** | | |
|---|---|---|
| **Compliance Overview** | This section provides a summary of your portfolio's regulatory compliance level.<br><br>**1. Table:** Lists the regulations your portfolio complies with (green check marks) and those it doesn't (red crosses).<br><br>**2. Dial:** Shows your portfolio's overall compliance percentage, with green for compliance and red for non-compliance. | **1.**<br>  <br><br>**2.**<br>  <br> |

| | | |
|---|---|---|
| **Regulations** | This table offers a more detailed breakdown of which regulations your portfolio is breaching—if any—and to what extent. It shows:<br><br>- The number of breaches within a selected time range.<br><br>- Your supply chain's compliance rating out of 100.<br><br>- Your supply chain's overall compliance status (compliant or non-compliant). |  <br>Regulation \| Breaches \| Rating \| Compliance<br>German Supply Chain Act (LkSG) \| 138 \| 0 / 100 \| Non-Compliant<br>EU Supply Chain Act (CSDDD) \| 34 \| 50 / 100 \| Non-Compliant<br>UN Global Compact Principles (UNGC) \| 6 \| 80 / 100 \| Non-Compliant<br>Sustainable Development Goals (SDGs) \| 4 \| 85 / 100 \| Non-Compliant<br>PAI Principal Adverse Impact (PAI) \| 0 \| 100 / 100 \| Compliant |
| **Comparative Non-Compliance** | This pie chart compares the regulations your portfolio is breaching based on severity level (segment color) and number of violations (segment size). |  |
| **Top Breaches** | This tree map shows which regulations and principles your portfolio holdings have breached.<br><br>The large boxes represent regulations, and the color-coded boxes inside them represent specific principles.<br><br>Regulations and principles are both organized in a hierarchy based on the number of times they've been breached and their ESG risk scores.<br><br>**- Box size:** Shows how many times a regulation or principle has been breached. The more violations, the bigger the box. | **1.**<br> |

| | | |
|---|---|---|
| | **- Box color:** Represents the breach severity level.<br><br>**- Box number:** Tells you how many times a principle has been breached.<br><br>Hover over this chart to see:<br><br>- The **names of the principles** your supply chain has breached<br><br>- The **number of times** your portfolio has breached each principle (click to open your Incident List). | |
| **Holdings with Most Number of Breaches** | This section lists the holdings in your portfolio that have breaches regulations the most number of times. They're ranked from highest number of breaches to lowest.<br><br>Each row includes the company name, number of breaches (click to open your Breach List) ESG risk score, and risk change percentage.<br><br>Click **View All** to open your Holdings List. |  <br>Holdings with Most Number of Breaches View All<br><br>Holding / Breaches / ESG Risk / Risk Change<br>1 Schuster LLC 345 95 ↑ 25%<br>2 Hickle, Crooks and A... 234 90 ↑ 20%<br>3 Marvin - Brakus 123 85 ↑ 20%<br>4 Emard and Sons 56 70 ↑ 15%<br>5 Stroman, Jacobi and... 34 70 ↓ 5%<br>6 Stroman, Jacobi and... 34 70 ↓ 5%<br>7 Stroman, Jacobi and... 34 70 ↓ 5%<br>8 Stroman, Jacobi and... 34 70 ↓ 5%<br>9 Stroman, Jacobi and... 34 70 ↓ 5%<br>10 Stroman, Jacobi and... 34 70 ↓ 5% |

## Breach Overview

This section shows your portfolio's most recent breaches for each regulation and the types of breaches that occur most often. Use the tabs at the top to view breach data for each regulation.




*Learn more about [regulations on ESG Sentinel](#).*

These regulations are:

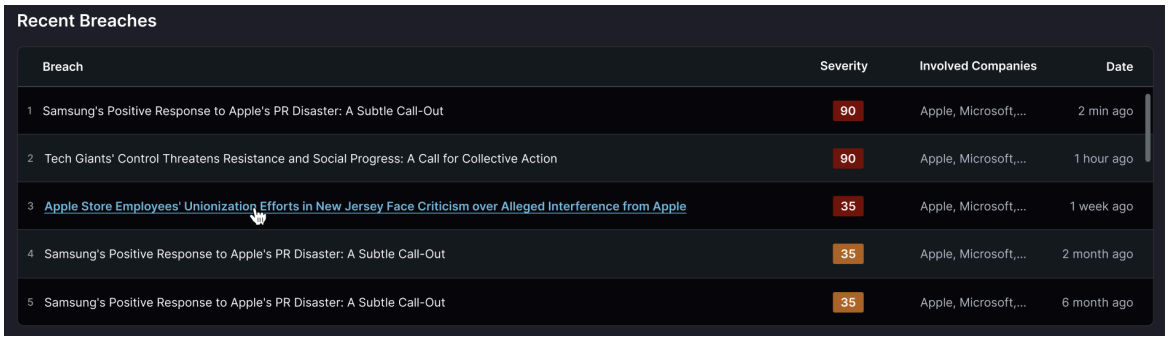
- German Supply Chain Due Diligence Act (LkSG)
- The Corporate Sustainability Due Diligence Directive (CSDDD)
- United Nations Global Compact (UNGC)
- UN Sustainable Development Goals (SDGs)
- Principal Adverse Impact (PAI)

Each regulation tab opens two tables: **Recent Breaches** and **Most Frequent Breach Principles**. When you click on a tab, you'll see information specific to the selected regulation only.

Click **View All Breaches** in the top right to open your [Breach List](#).

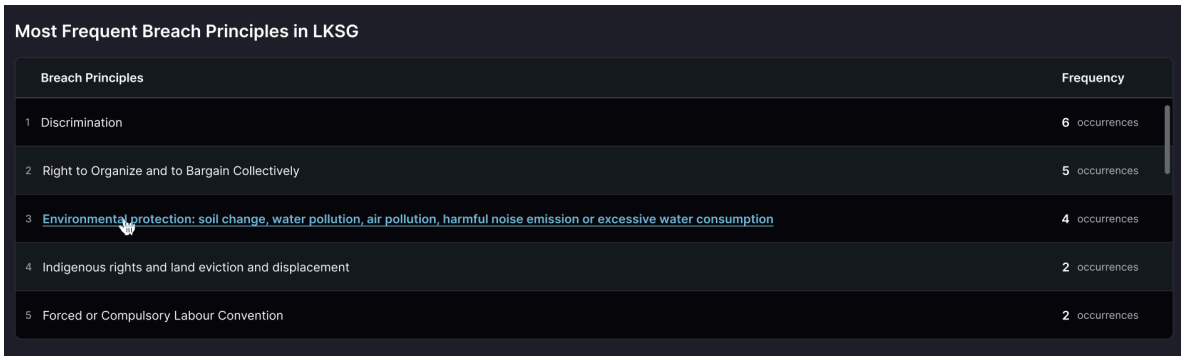
## Recent Breaches

Shows a real-time list of your portfolio's latest breaches under your chosen regulation. It includes the breach headline, severity level, involved companies, and time stamp.




## Most Frequent Breach Principles

Shows the principles (of your selected regulation) that your portfolio has violated most often. The principles are listed on the left, with the number of breaches shown on the right.



Click on a principle to read more details about it.

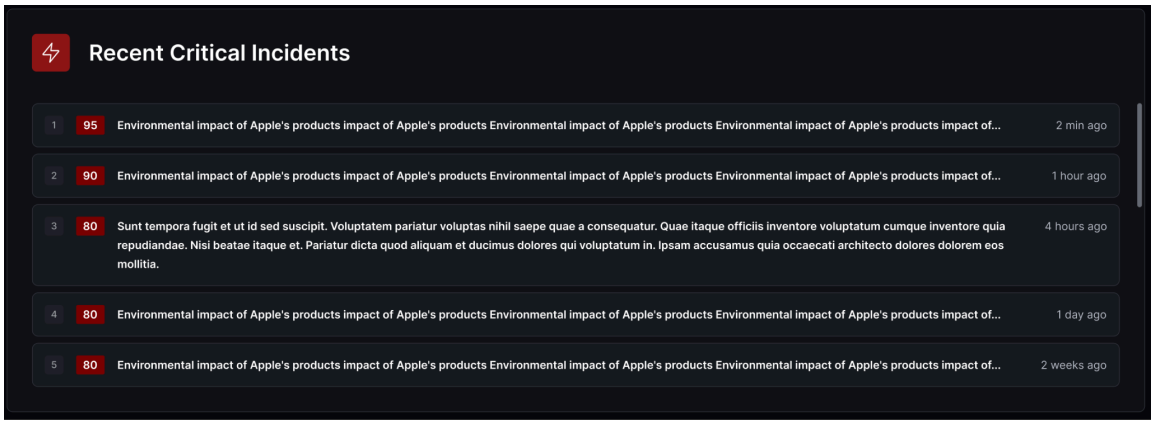
## 5.3.6 Incident Analysis

This section provides key details on the ESG incidents that your portfolio companies have been involved in, including incident frequency and location, risk scores and categories, financial impact, and more.

### Recent Critical Incidents

This real-time feed displays the latest ESG incidents linked to your portfolio with the highest severity scores.

These incidents are likely to have the biggest impact on your investments, so check this feed regularly for crucial risk intelligence.




### Recent Incidents

This section breaks down the recent incidents in your portfolio by category (environment, social, governance). Use the tabs at the top to cycle between different categories.

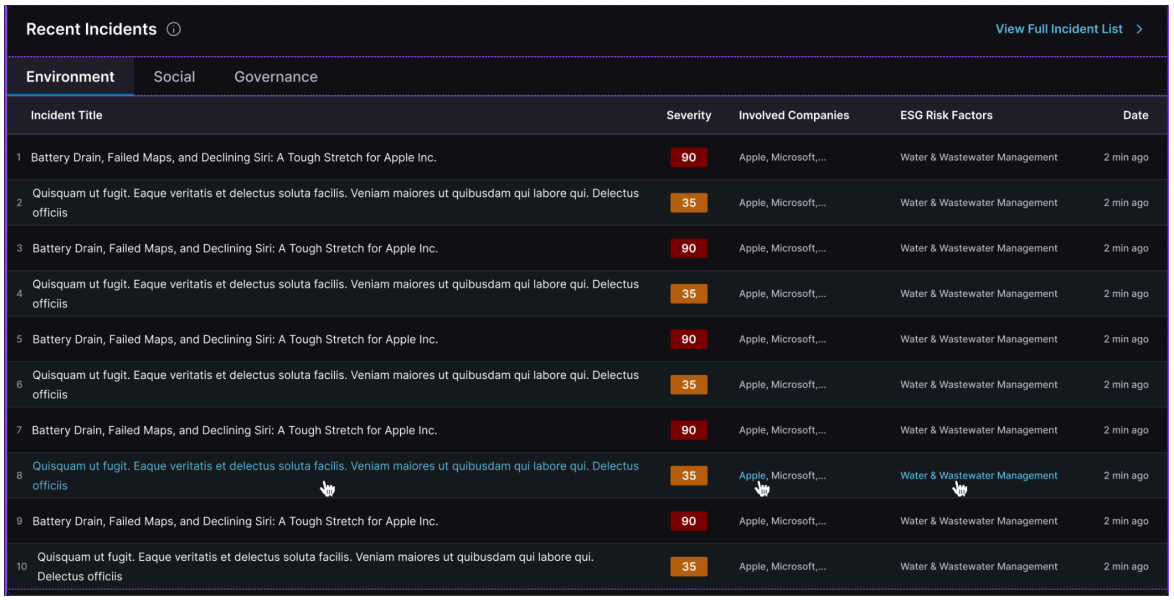
Alongside the ESG category, incident title, incident severity score, and time stamp, this table also includes details on the companies involved and ESG risk factors responsible for each incident.

- An **Incident Title** to view the full Incident Details page.

- An **Involved Company** to see its full company page.

- An **ESG Risk Factor** to head to the Incident Analyzer.

- The **View Full Incident List** button in the top right-hand corner to open your Incident List.




## Incidents by ESG Categories

This tree map shows which ESG categories and subcategories incidents related to your portfolio have occurred in. The large boxes represent the main ESG categories (Environment, Social, and Governance), and the color-coded boxes inside them represent specific sub-categories.

ESG categories and subcategories are organized in a hierarchy based on the number of incidents that have occurred within them.

- **Box size:** Shows how many times an ESG category has been attributed to an incident.

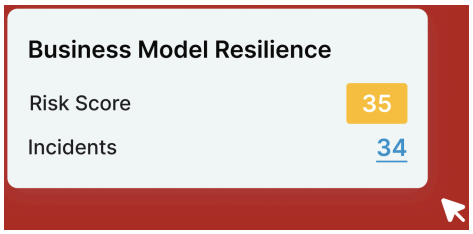
- **Box color:** Represents the incident severity level.

- **Box number:** Tells you how many times an incident has occurred within the ESG category.

Hover over this chart to see:

- The **names** of each ESG sub-category.
- The **risk score** for each ESG sub-category.
- The **number of incidents** that have occurred within each category

(click to open your Incident List).



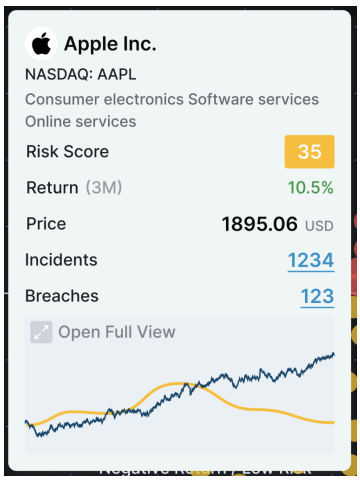

## Clustering Analysis

This cluster diagram organizes your portfolio by ESG risk level and return. The X and Y axes show return levels as percentages, from 100% to -100%.

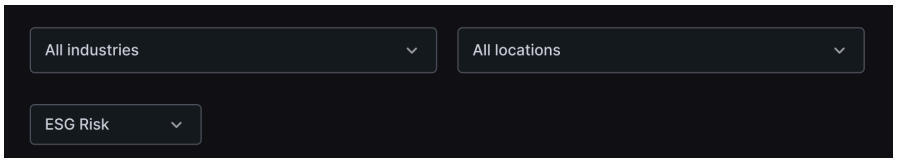
The circles represent the companies in your portfolio. They're color coded by their ESG risk level, as shown by the key:

Hover over a company on the diagram to see its:

- Ticker symbol
- Bio
- Risk score
- Return
- Stock price
- Number of incidents (click to open your Incident List)
- Number of breaches (click to open your Breach List)
- Risk score vs. stock price chart (click **Open Full View** to see an expanded version)



Use the dropdown menus to filter the data by **industry**, **location**, and **ESG risk category and subcategory**.

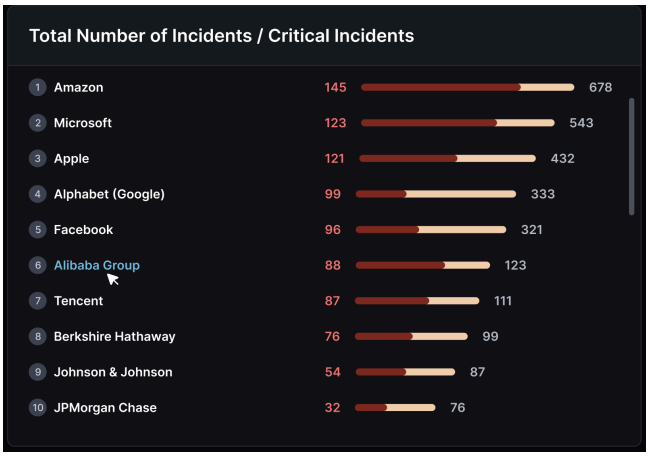



Expand the cluster diagram by clicking the expand button in the top right.

In the expanded view, hover e

## Total Number of Incident / Critical Incidents

This section displays the top ten companies in your portfolio with the most incidents (related to your search), as well as how many of those incidents are ranked by ESG Sentinel as **Critical**.




The list on the left ranks the companies by total incidents (no.1 has the most incidents).

The chart on the right shows the total number of incidents in beige, with **Critical incidents** highlighted in red.

Click on a company name in the list to see their full company page.

## Incidents Preview

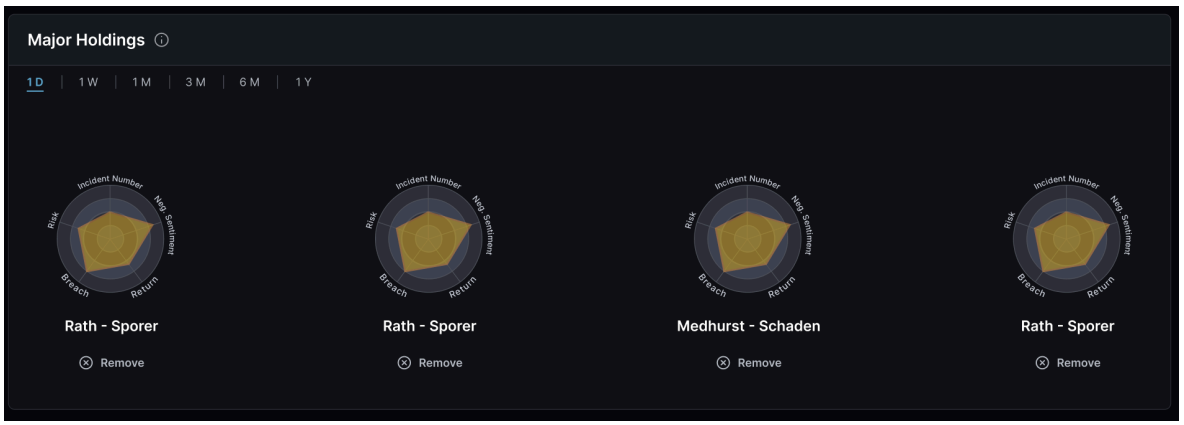
This section displays a map of where the ESG incidents related to your portfolio have occurred, grouped and color-coded by their severity levels. It also provides a breakdown of incident counts by continent.

Click **View Full Map** in the top-right corner to expand the view and explore the data in more detail on a full world map.

## Criteria Comparison

### Major Holdings

These charts compare the ESG performance of your main portfolio holdings.

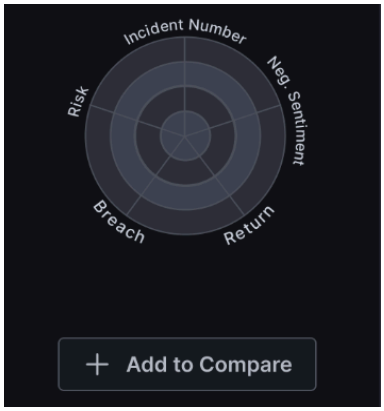



They look at five key metrics:

**1. Incident Number**: How many incidents the company has been affected by.
**2. Neg. Sentiment:** The amount of negative feedback surrounding the company on social media (Xcorp and Reddit).
**3. Return**: The company's return on investment.
**4. Breach**: The extent to which the company has breached industry regulations.
**5. Risk**: The company's overall ESG risk level.

You can choose which companies appear in this line up.
Click **Remove** to remove a company from the line up.

Click **Add to Compare** to add a new holding to the line up. This option will only appear once you've removed a company.

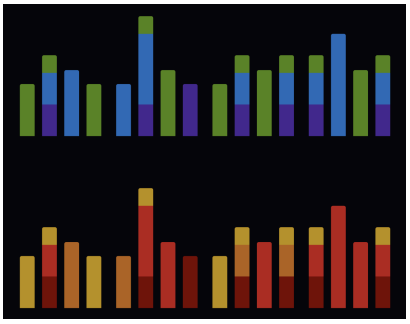
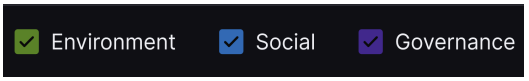
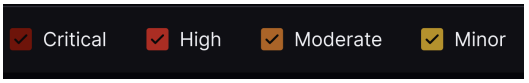

Incident Number
Neg. Sentiment
Return
Breach
Risk
Add to Compare

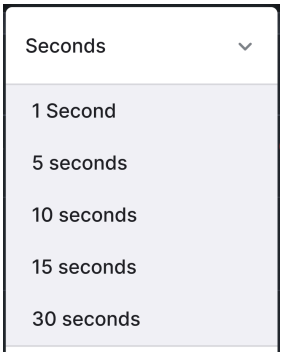
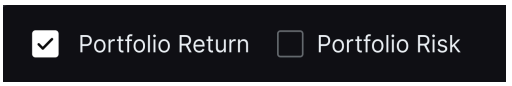
## 5.4 Full Chart View (Portfolio Return & Risk)

When you expand the **Portfolio Return & Risk** chart on your Portfolio, you'll open a detailed view that gives you more control over how the chart is displayed and which data it shows you.

### 5.4.1 Filters

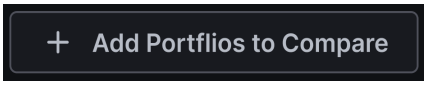
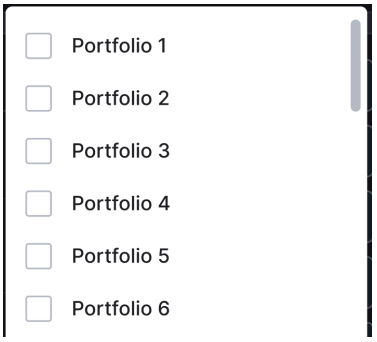
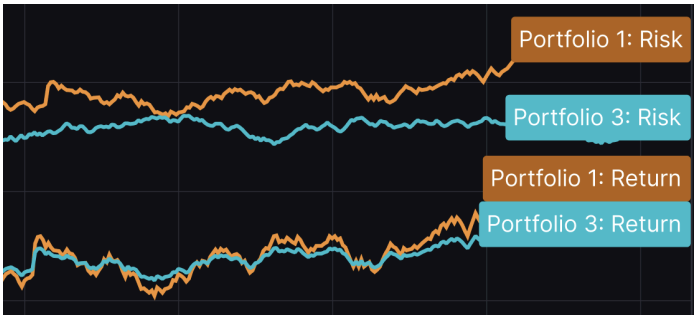
Use these tools to customize the type of data that your chart displays.

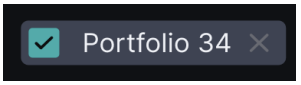
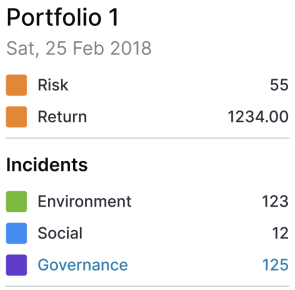
| | | |
|---|---|---|
| **Toggle Bar Chart View** | Use the toggle at the bottom of the screen to switch the incident data in the bar chart between ESG categories and severity levels. |  |
| **Toggle ESG Categories** | Use the checkboxes at the bottom of the screen to choose which categories appear in the bar chart.<br><br>The options change based on your selected bar chart view (ESG Category or Severity). |     |
| **Specific Time Range** | **1.** To choose a specific time range in seconds, minutes, hours, or | **1.** |

| | | |
|---|---|---|
| | days, click the calendar icon above the chart.<br><br>**2.** Select your desired time frame from the dropdowns below. | <br>**2.**  |
| **Portfolio Risk & Return** | Check the boxes above the chart to view data on each portfolio's return, ESG risk level, or both simultaneously. |  |

## 5.4.2 Comparing Portfolios

The expanded view of the **Portfolio Return & Risk** chart lets you compare the return levels and risk scores of different portfolios. Here's how.

| | |
|---|---|
| Click the **Add Portfolios to Compare** button at the top of the chart. |  |
| Select the portfolios you want to compare from the dropdown menu that appears. |  |
| Your chart will now display the return levels or risk scores of your selected portfolios on the chart.<br><br>The lines are color-coded and labeled, making it easy to distinguish between portfolios and see whether they represent return or risk levels. |  |

| | |
|---|---|
| Your selected portfolios also appear as tabs at the top of the chart.<br><br>Click the **X** symbol on a portfolio tab to remove it from the chart, or check the box to add it. |  |
| **1.** Hover over a portfolio's line to see its risk and return levels on a specific date, along with a breakdown of its ESG incidents by category.<br><br>**2.** Once you've added other portfolios to the chart for comparison, you'll see their risk scores and return levels appear on hover, under **Portfolio Risk / Return**. | **1.**<br>  <br>**2.**<br> |

## 5.4.3 Toolbar

| | | |
|---|---|---|
| **Zoom In/Reset** | Click the magnifying glass with the plus symbol to zoom in, or click the minus symbol to reset the view. | |
| **Horizontally Select** | Click this button to open a lasso tool, which you can use to select portions of the chart horizontally. | |
| **Change Style** | Click this button to switch between chart styles: line chart, line chart with markers, or candle chart. | |
| **Save as Image** | Click this button to save your current chart view as an image. | |

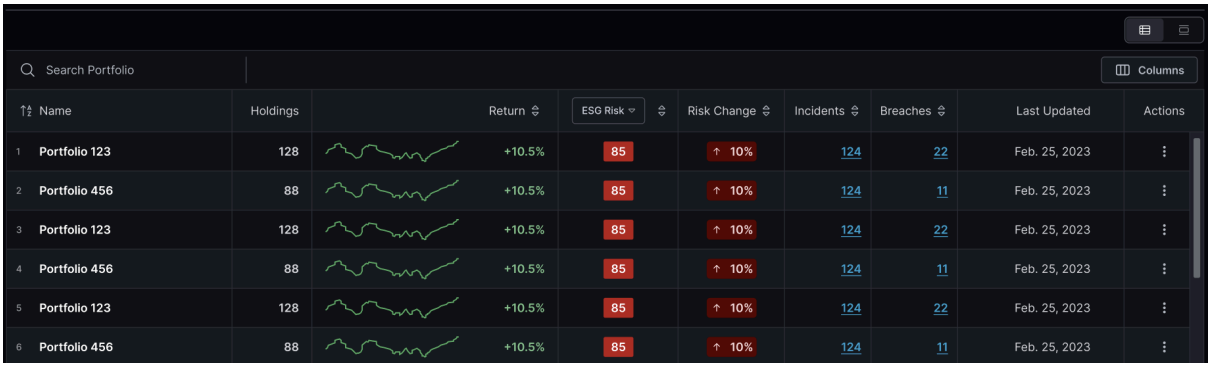
## 5.5 Managing Your Portfolios

After creating one or more portfolios, you can view them on your **My Portfolios** page. You'll land here when you open the **Portfolio** feature in ESG Sentinel.

Here, you'll get a quick overview of key ESG risk and performance data for each portfolio, available in either list or card view.

***Haven't created a portfolio yet?*** *Head to the section on [Creating a Portfolio]() to get started.*

**Your portfolios can be listed in a table:**

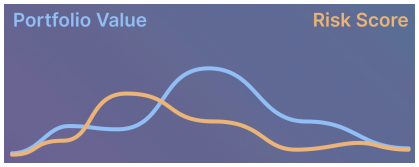



**Or as cards:**

To switch between these two views, use the toggle in the top right corner of the screen.

Although they look different, both the **Portfolio Table** and **Card** views show the same information:

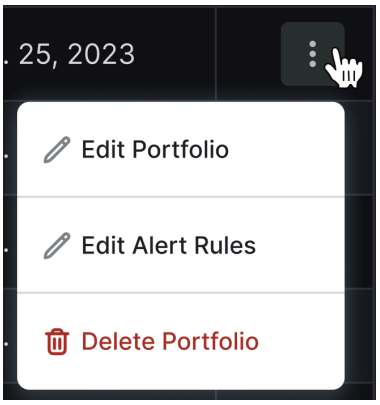
- **Portfolio Name:** The name of your portfolio.
- **Holdings:** The number of holdings in your portfolio.
- **Return:** The portfolio's return rate as a percentage, along with a line graph showing its change in value over time.
    - Portfolio cards also show a line for ESG risk score (orange) against value (blue).

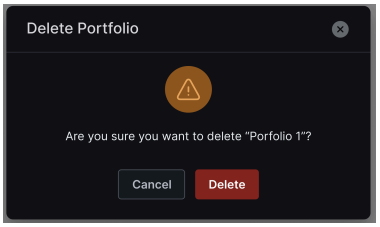
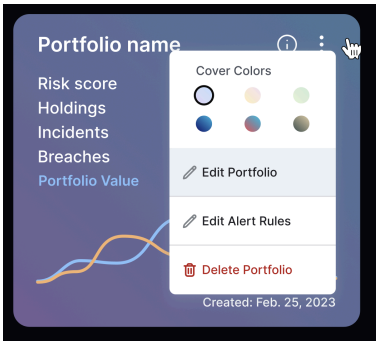



- **Risk Score:** The portfolio's current ESG risk score.
- **Risk Change:** The portfolio's change in ESG risk score, as a percentage.
- **Incidents:** The number of ESG incidents your portfolio is involved in. Click the counter to open your Incident List.
- **Breaches:** The number of regulatory breaches in your portfolio. Click the counter to open your Breach List.
- **Last Updated:** The date and time your portfolio's data was last updated.

## 5.5.1 Portfolio Actions

Click the **vertical three-dot menu** at the end of a portfolio row or on a portfolio card to perform the following actions:

| | | |
|---|---|---|
| **1. Edit Portfolio**<br>**2. Edit Alert Rules**<br>**3. Delete Portfolio** | **1.** This option brings you to the portfolio editing page, where you can add, manage, and delete your holdings (see Editing your Portfolio).<br><br>**2.** This option lets you edit the Alert Rules you've set up for your Portfolio. Learn more about customizing alerts in the Alert Center section.<br><br>**3.** Click on this option to delete the entire portfolio from your collection.<br><br>**3a.** You'll be asked to confirm your decision. Click **Delete** to continue or **Cancel** to exit without deleting. | **1., 2., 3.**<br>  <br><br>**3a.** |
| **4. Change Portfolio Cover Color** | **4.** The color of your portfolio cards match the header on the portfolio page. | |

| | | |
|---|---|---|
| **(Portfolio Card Only)** | You can select a new cover color for your portfolio card by clicking the vertical three-dot menu and choosing a color circle. |  <br>**4.**<br>  |

# 7 Social Media Coverage

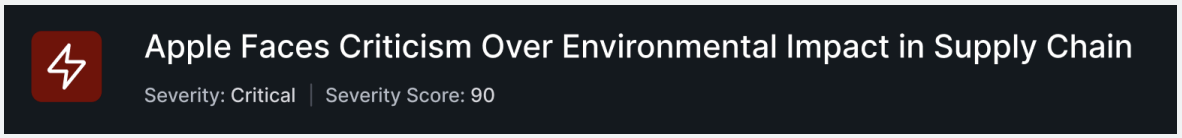
The **Social Media Coverage** feature gives you a full breakdown of how people are reacting to an ESG incident. Here, you can see posts from X Corp and Reddit, get a sense of how users feel about the incident, and explore key topics people are talking about.

On this page, you'll see posts and comments categorized by ESG Sentinel as **Positive**, **Negative**, or **Neutral**. To give you a sense of what these types of posts may look like, here are some examples:

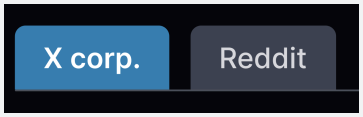
| Category | Example |
|---|---|
| Positive | "Great to see the company addressing environmental issues!" |
| Neutral | "Interesting development, let's see how it plays out." |
| Negative | "Another oil spill? This company needs to do better." |

## Overview

At the top of the **Social Media Coverage** page, you'll find the name of the incident, along with its severity level and risk score.

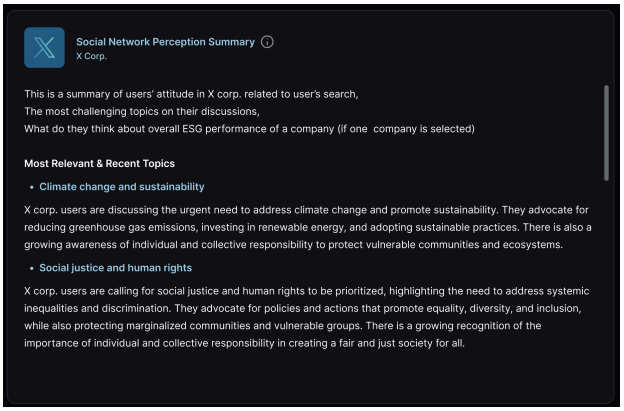


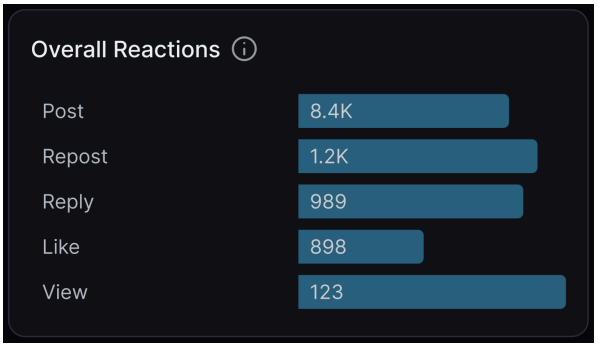
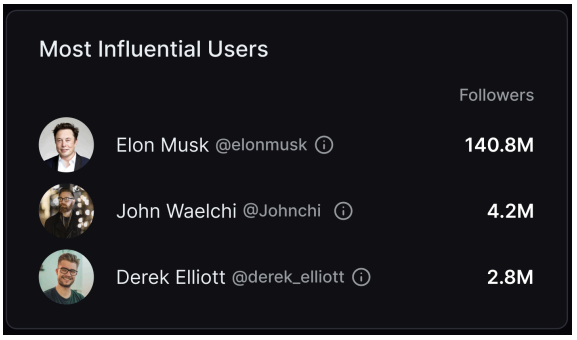
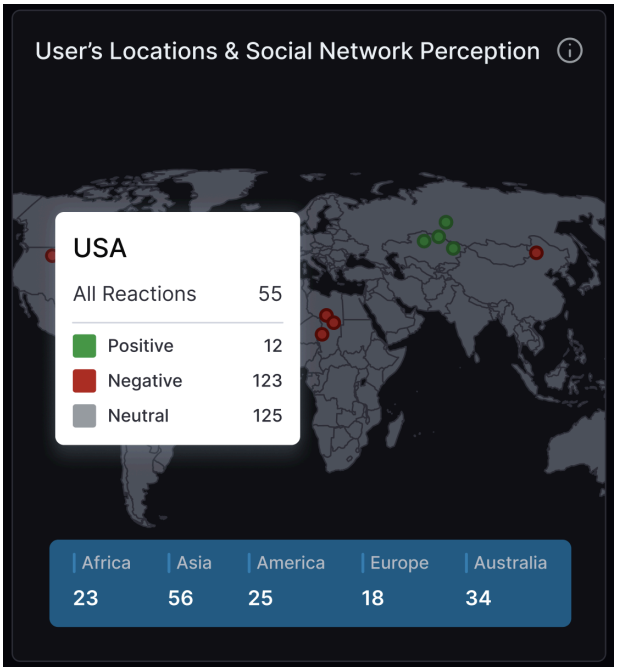

Use the tabs below to toggle between reactions from X Corp and Reddit. Selecting a tab updates the page with insights from the chosen platform.

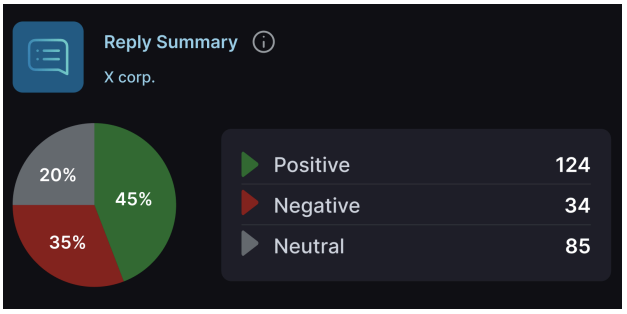
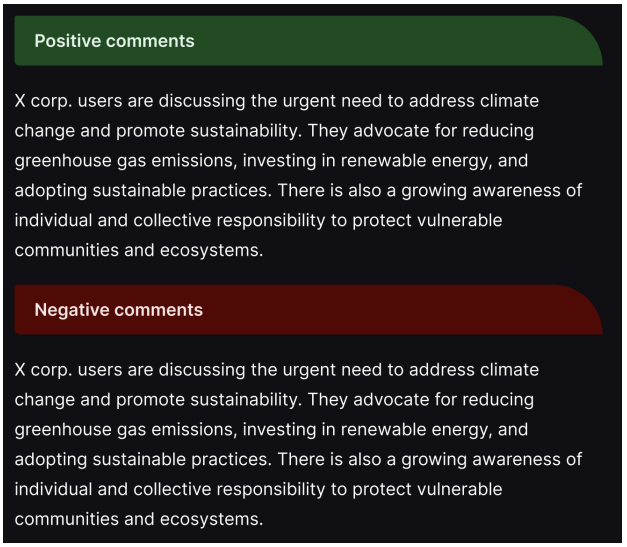


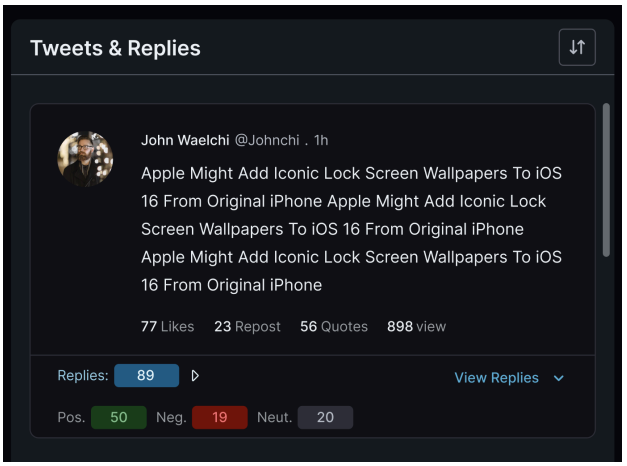
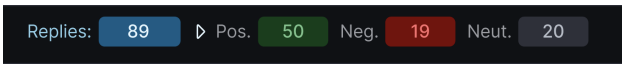
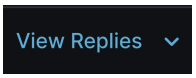
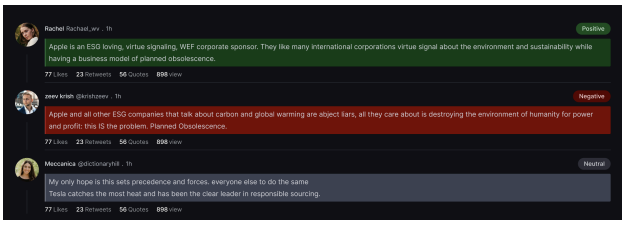
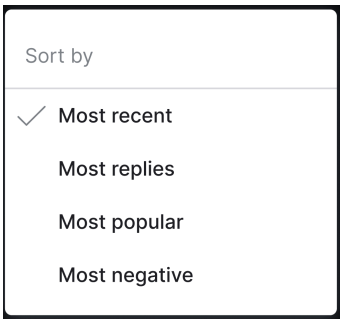

**Summary**

This section provides a summary of how people are reacting to the incident on your chosen social media platform, generated by ESG Sentinel's AI model. It looks at posts, comments, and replies to show user sentiment, key topics, and overall reactions.



| | | |
|---|---|---|
| | Scroll through the summary to get a quick sense of the online conversation around the incident. | |
| **Overall Reactions** | This bar chart shows the breakdown of reactions on your chosen social media site, including the number of posts, reposts, replies, likes, and views related to the incident. It also highlights how each type of reaction has contributed to the social media report. |  |
| **Most Influential Users (X Corp Only)** | This section displays the X Corp users with the most followers who are reacting to the incident. It includes their profile picture, name, handle, and the number of followers they have. |  |
| **Users' Locations & Social Network Perception** | This map shows where users are located around the world, with color-coded dots representing their reactions to the incident.<br><br>- Green dots: **Positive** reactions.<br><br>- Red dots: **Negative**.<br><br>- Gray dots: **Neutral** reactions.<br><br>Hover over a dot to see the number of users and the reaction breakdown for each country. You'll also see a breakdown by continent at the bottom of the map. |  |

| | | |
|---|---|---|
| **Top Hashtags in Reactions (X Corp Only)** | This section shows you which hashtags people are using most in response to the incident. The bigger the hashtag, the more frequently it's being used. | |
| **Reply Summary** | This section shows users' replies categorized by sentiment: positive, negative, or neutral.<br><br>**1.** The color-coded pie chart gives you a quick view of the percentage of replies in each sentiment category, while the list below shows the actual numbers.<br><br>**2.** Below the chart, ESG Sentinel's AI model summarizes what people are saying in positive and negative comments. | **1.**<br>  <br>**2.**<br>  |

| | | |
|---|---|---|
| **Tweets & Replies / Posts & Comments** | **1.** The **Tweets & Replies** (X Corp) or **Posts & Comments** (Reddit) section highlights key posts related to the incident from your chosen social media platform. | **1.**<br>  <br> |
| | **2.** For each post, ESG Sentinel provides a breakdown of the replies, showing how many are positive, negative, or neutral. | **2.**<br>  <br> |
| | **3.** Click **View Replies** to see all the replies, color-coded by sentiment. | **3.**<br>  <br><br>  |
| | **4.** You can use the **Sort** button in the top-right corner to change the order of the posts. | **4.**<br> <br>  <br> |

# 8 Company Page

When you search for a company on ESG Sentinel or click through on its name from another page (such as your Portfolio), you'll open its full **Company Page**. This page displays a real-time feed of the company's ESG risk and performance metrics, including incident news and reports, regulatory breaches, social media sentiment, and more.

The company's details, including its name, bio, address, and website, are listed at the top of this page.

Click on the **About the Company** button to see an expanded view of the company's details, including a full biography and exchange/ticker information.

Use the tabs at the top of the page to switch between:

- Company Details: Shows the company's ESG data.
- Supply Chain: Shows ESG data for the company's supply chain.

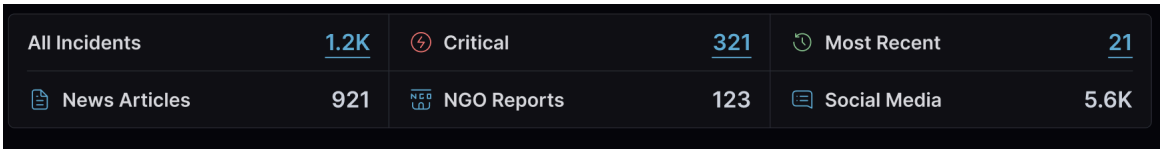
## 8.1 Company Details

This page shows you key data about the company's ESG performance and risk levels. It includes eight tabs:

- Overview
- Risk Analysis
- Peer Companies
- Breaches & Violations
- Incidents Analysis
- Social Media Coverage
- Regulatory & Legal Actions

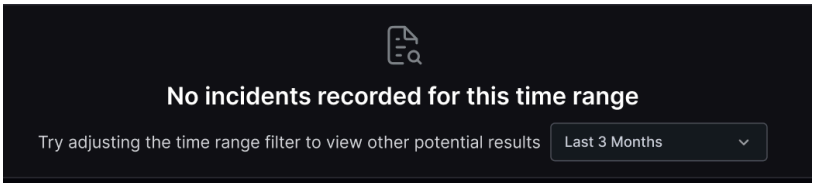
### 8.1.1 Overview

The **Overview** section displays a table of the company's incidents (top row) and news sources (bottom row). These are organized by type.




*Click on the incident number counters to open your Incident List.*

***No Incidents?*** *If no incident data is available, an alert will appear to suggest a new time range, which you can choose from the dropdown menu.*



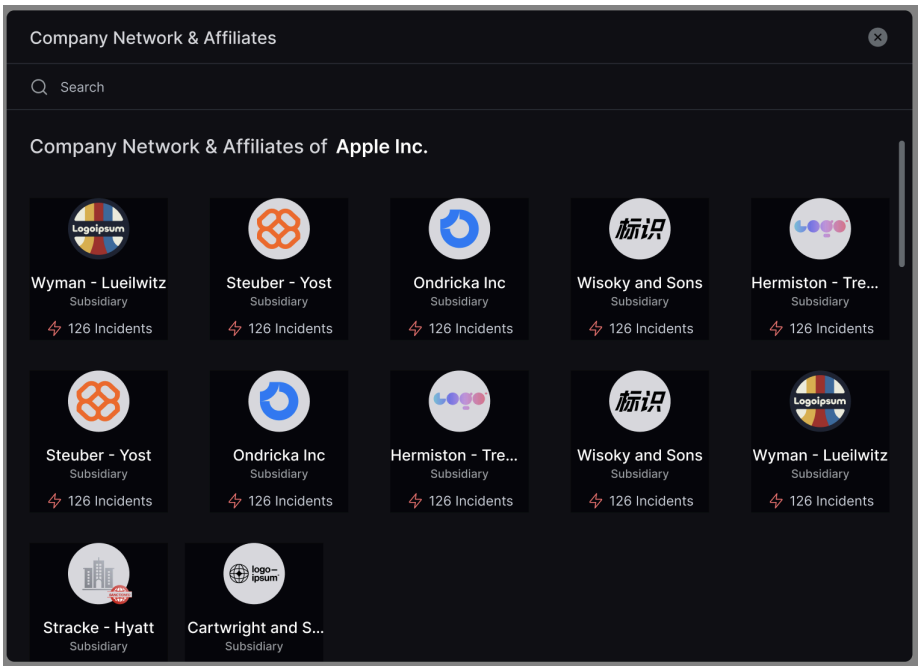
## Company Network & Affiliates

The Overview section of the **Company Details** page also lists the main companies affiliated with your searched company.

This row includes the companies' names, logos (if detected by ESG Sentinel), relationship to your searched company, and ESG incident count.

This section can only display a limited number of companies. To see the full list, click **View All** in the top-right.

On this page, you can search for a specific company using the search bar at the top and click on a company name to open its full page.

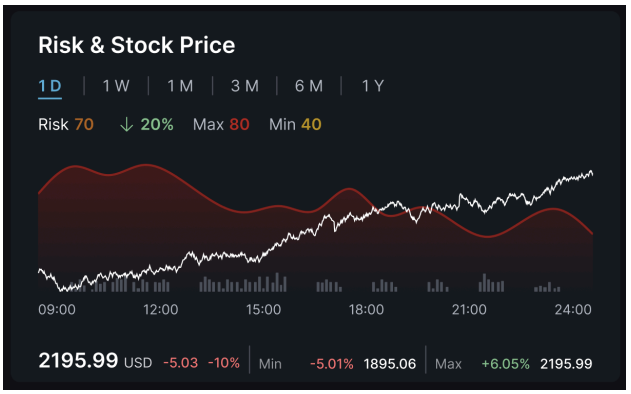
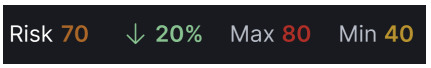
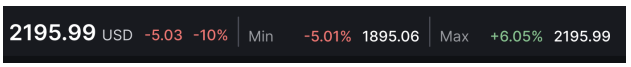
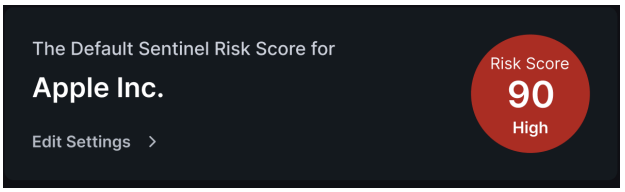
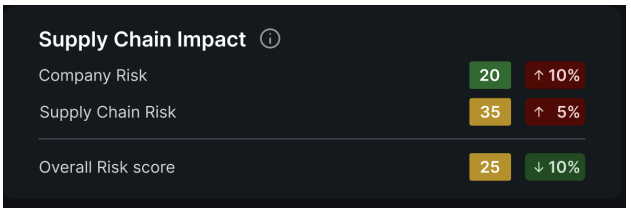


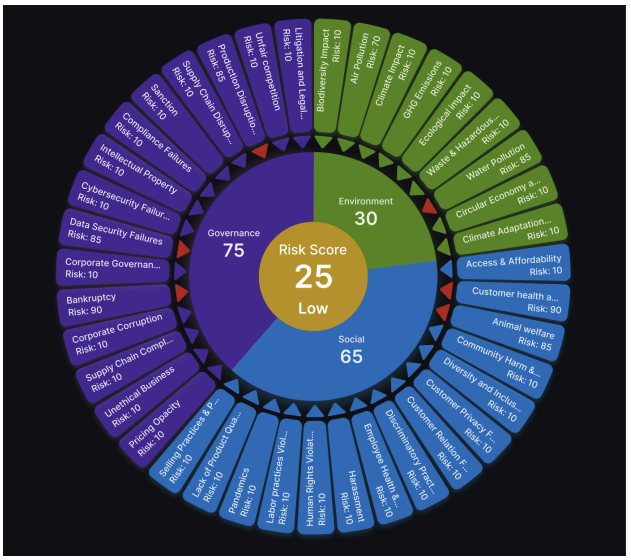
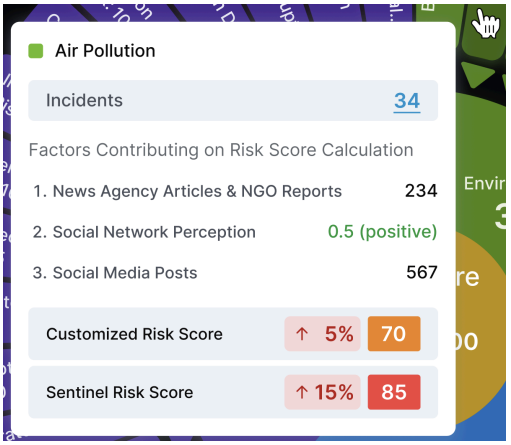

Click the **X** button in the top right to exit the page.

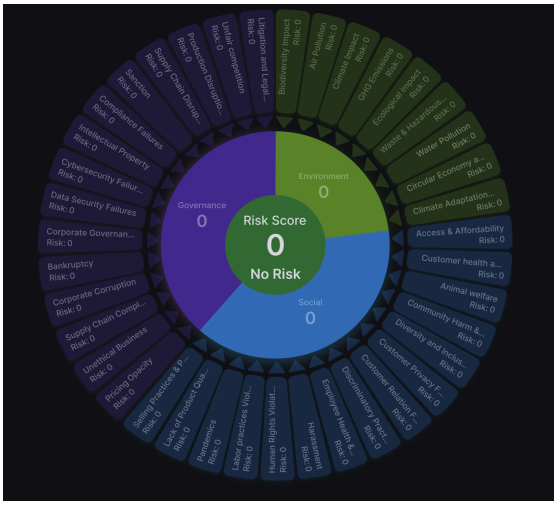
## 8.1.2 Risk Analysis

The **Risk Analysis** section is home to information related to the company's real-time ESG Risk Score.

*Note: ESG Risk Scores will automatically adjust if you [customize your risk score parameters](#).*

| | | |
|---|---|---|
| **Risk & Stock Price** | **1.** The chart shows the company's ESG risk level (red line) compared to its stock price (white line).<br><br>**2.** The row above the chart shows the company's current, maximum, and minimum ESG risk levels, along with a percentage change indicator.<br><br>**3.** The row below the chart shows the company's current stock price, currency, and change indicators. | **1.**<br>  <br><br>**2.**<br>  <br><br>**3.**<br>  <br> |
| **Default Risk Score** | This is the company's default ESG risk score. It's calculated in real-time by ESG Sentinel based on your incoming risk intelligence.<br><br>Click **Edit Settings** to [customize risk score parameters](#). |  <br> |
| **Supply Chain Impact** | This section tells you how the company's supply chain is affecting its overall ESG risk score.<br><br>It shows scores and change indicators for the risk level of the company and its supply chain, as well as the overall risk score. |  <br> |

| | | |
|---|---|---|
| **ESG Risk Score** | **1.** This pie chart breaks down the company's ESG risk score into more detail.<br><br>It shows:<br><br>- The company's overall ESG risk score (center).<br><br>- Risk scores for each main ESG category (inner ring).<br><br>- Risk scores for ESG subcategories (outer ring). | **1.**<br>  <br> |
| | **2.** The color-coded arrows show the level of risk that each ESG sub-category contributes to the company's overall risk score. | **2.**<br> <br> |
| | **3.** Hover over each section of this chart to see a breakdown of:<br><br>- The number of incidents in that category (click to open your Incident List).<br><br>- Key factors influencing the category's risk score.<br><br>- The category's customized risk score and any changes (if applicable).<br><br>- ESG Sentinel's default risk score for the category and any changes.<br><br>**4.** If there's no incident data available for your chosen time range, the ESG risk score chart will | **3.**<br>  <br><br>**4.** |

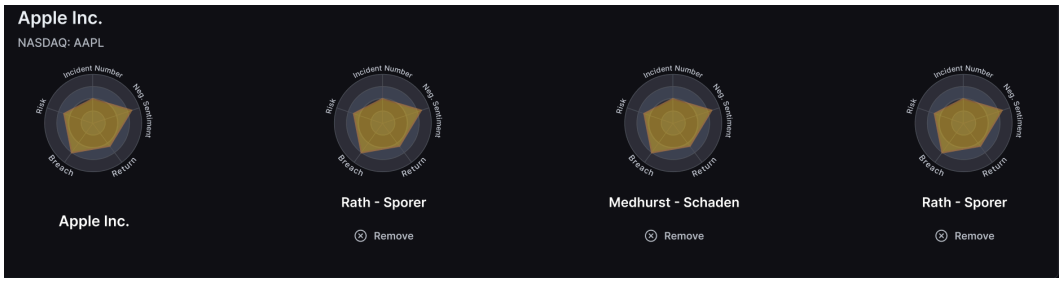
| | | |
|---|---|---|
| | not show any information. |   |

## 8.1.3 Peer Companies

This section compares the company's ESG risk and performance levels to its peers.

### Peer Companies' Incident Comparison

These charts compare the company's ESG incident data (far left) with four peer companies.



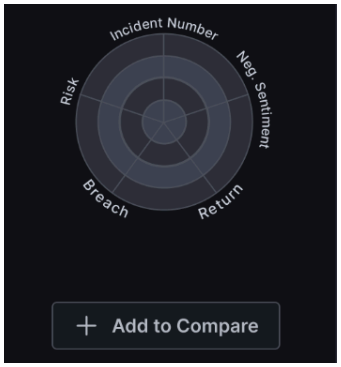

They look at five key metrics.

**1. Incident Number:** How many incidents the company has been affected by.
**2. Neg. Sentiment:** The amount of negative feedback surrounding the company on social media (Xcorp and Reddit).
**3. Return:** The company's return on investment.
**4. Breach:** The extent to which the company has breached industry regulations.
**5. Risk:** The company's overall ESG risk level.

You can choose which companies appear in this line up.

Click **Remove** to remove a company from the line up.

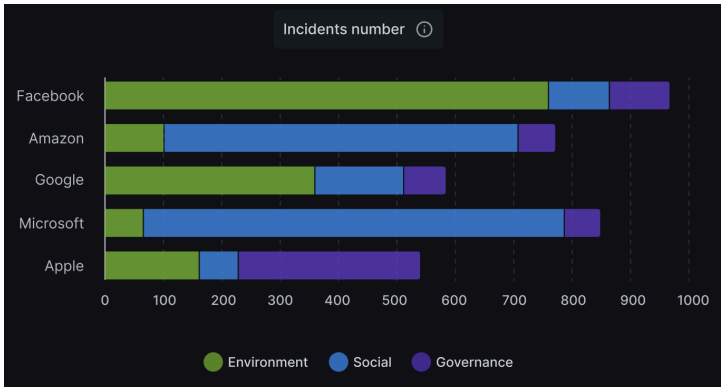
Click **Add to Compare** to add a new peer company to the line up. This option will only appear once you've removed a company.



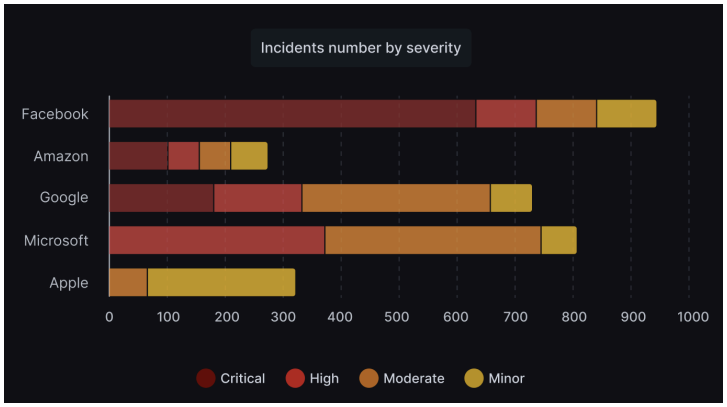

## Peer Companies' Incidents

This section shows the number of incidents affecting the company's peers, divided into two charts:

**1.** The number of incidents by **ESG category** (environmental, social, or governance).



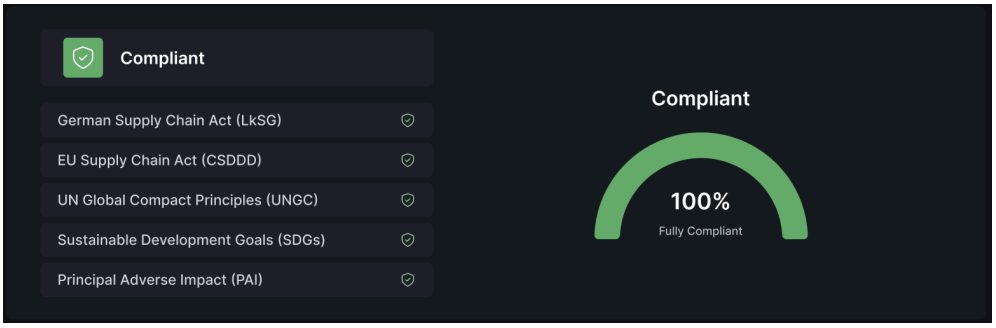

**2.** The number of incidents by severity level.




## 8.1.4 Breaches & Violations

**Breaches & Violations** shows whether the company is breaching key industry regulations. If it's non-compliant, this section reveals the severity of the breaches, the regulations and principles violated, and more specific breach details.

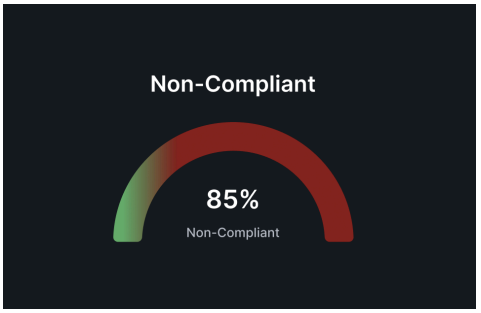
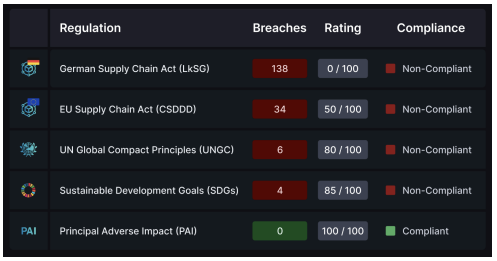
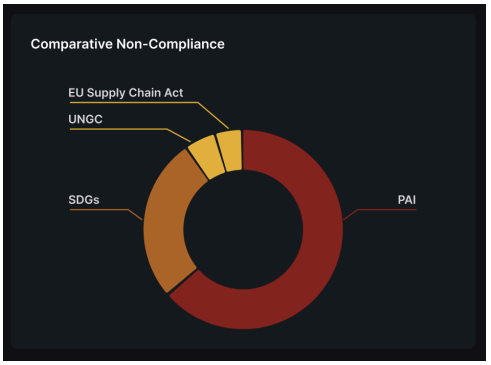
*If the company is fully compliant within your selected time range, you'll only see its* ***compliance overview*** *(see below for details). The rest of the sections in this tab will not appear.*

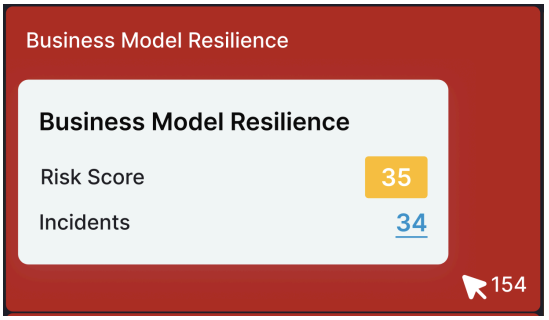
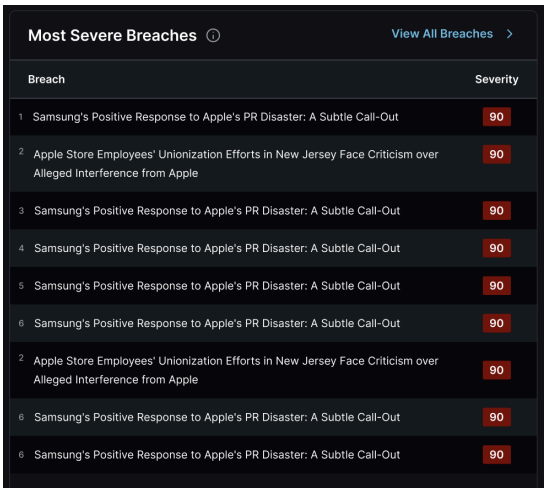



*Learn more about [regulations on ESG Sentinel](#).*

If the company is non-compliant in some way, the **Breaches & Violations** tab will expand to show two key sections:

## Regulatory Compliance

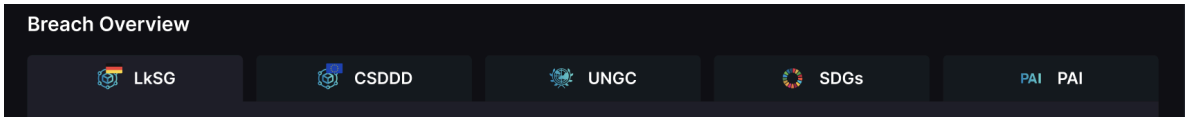
| | | |
|---|---|---|
| **Compliance Overview** | This section provides a summary of the company's regulatory compliance level.<br><br>**1. Table:** Lists the regulations the company complies with (green check marks) and those it doesn't (red crosses).<br><br>**2. Dial:** Shows the company's overall compliance percentage, with green for compliance and red for non-compliance. | **1.**<br> <br><br>**2.**<br>  <br> |
| **Breached Regulations** | This section offers a more detailed breakdown of which regulations the company is breaching (if any) and to what extent. It includes two parts:<br><br>**1. Table**: Lists each regulation, showing:<br><br>- The number of breaches within a selected time range<br>- The company's compliance rating out of 100<br>- The company's overall compliance status (compliant or non-compliant)<br><br>**2. Comparative pie chart:** Compares the regulations the company is breaching based on severity level (segment color) and number of violations (segment size). | **1.**<br>  <br>Regulation / Breaches / Rating / Compliance<br>German Supply Chain Act (LkSG) / 138 / 0 / 100 / Non-Compliant<br>EU Supply Chain Act (CSDDD) / 34 / 50 / 100 / Non-Compliant<br>UN Global Compact Principles (UNGC) / 6 / 80 / 100 / Non-Compliant<br>Sustainable Development Goals (SDGs) / 4 / 85 / 100 / Non-Compliant<br>PAI / Principal Adverse Impact (PAI) / 0 / 100 / 100 / Compliant<br>**2.**<br>  <br> |

| | | |
|---|---|---|
| **Top Breaches** | **1.** This tree map shows which regulations and principles the company has breached. The large boxes represent regulations, and the color-coded boxes inside them represent specific principles.<br><br>Regulations and principles are both organized in a hierarchy based on the number of times they've been breached.<br><br>**- Box size:** Shows how many times a regulatory principle has been breached. The more violations, the bigger the box.<br><br>**- Box color:** Represents the breach severity level.<br><br>**- Box number:** Tells you how many times a principle has been breached.<br><br>**2.** Hover over this tree map to see:<br><br>- The **names** of the principles the company breached.<br>- The **risk score** for each breached principle.<br>- The **number of times** the company has breached each principle. Click on this number to open your Incident List. | **1.**<br> <br><br>**2.**<br>  <br> |
| **Most Severe Breaches** | This section lists the company's most severe breaches, ranked from highest to lowest severity.<br><br>Each row includes details about the breach and its incident severity score.<br><br>Click **View All Breaches** in the top right-hand corner to open your Breach List. |  <br> |

## Breach Overview

This section shows the company's most recent breaches for each regulation and the types of breaches that occur most often.

Use the tabs at the top to view breach data for each regulation.



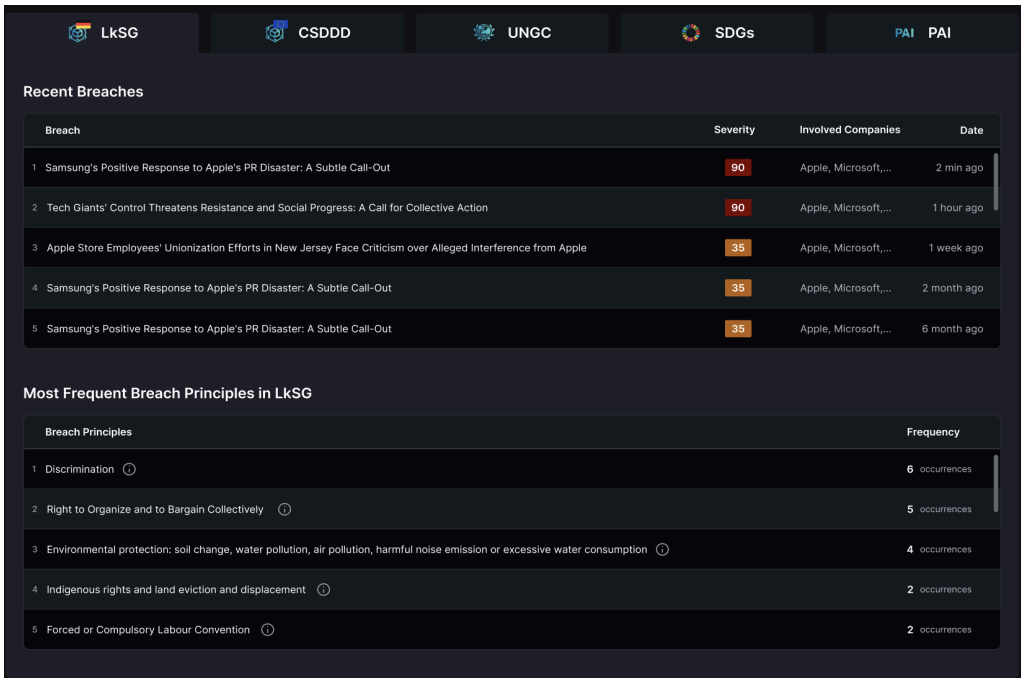

*Learn more about [regulations on ESG Sentinel](#).*

These regulations are:

- German Supply Chain Due Diligence Act (LkSG)
- The Corporate Sustainability Due Diligence Directive (CSDDD)
- United Nations Global Compact (UNGC)
- UN Sustainable Development Goals (SDGs)
- Principal Adverse Impact (PAI)

Each regulation tab opens two tables: **Recent Breaches** and **Most Frequent Breach Principles**.

When you click on a tab, you'll see information specific to the selected regulation only.




**Recent Breaches**: Displays a real-time list of the company's latest breaches under your chosen regulation. It includes the breach headline, severity level, involved companies, and time stamp.

**Most Frequent Breach Principles:** shows the principles (of your selected regulation) that the company has violated most often. The principles are listed on the left, with the number of breaches shown on the right. Click on the **information (i)** symbol to find out more about a certain principle.

## Companies with Most Number of Breaches

This list ranks companies in your searched company's supply chain by the number of regulatory breaches they have committed.

From left to right, each row in this list displays the company name, ESG risk level, percentile change in risk level, number of incidents, and relationship type to the company.

**Supplier** | Customer | Provider | Providee | Partner

| | Company | Breaches | ESG Risk | Risk Change | Relationship Type |
|---|---|---|---|---|---|
| 1 | Schuster LLC | 345 | 95 | ↑ 25% | Customer (Tier-1) |
| 2 | Hickle, Crooks and A... | 234 | 90 | ↑ 25% | Partner research collabo... |
| 3 | Marvin - Brakus | 123 | 85 | ↑ 20% | Partner equity investment |
| 4 | Emard and Sons | 56 | 70 | ↑ 15% | Partner joint venture |
| 5 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 6 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 7 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 8 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 9 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 10 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 11 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 12 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |
| 13 | Stroman, Jacobi and... | 34 | 70 | ↓ 5% | Customer (Tier-1) |

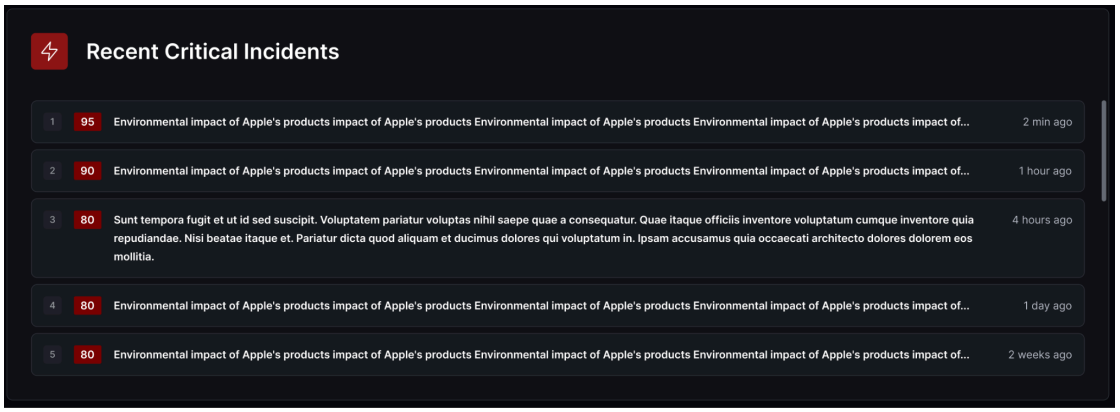
## 8.1.5 Incident Analysis

**Incident Analysis** provides detailed, real-time data on ESG incidents affecting the company, including their time, date, type, location, severity, and market impact.

***No Incidents?*** *If there's no incident data available for the time range you've selected, this section will not appear.*

### Recent Critical Incidents

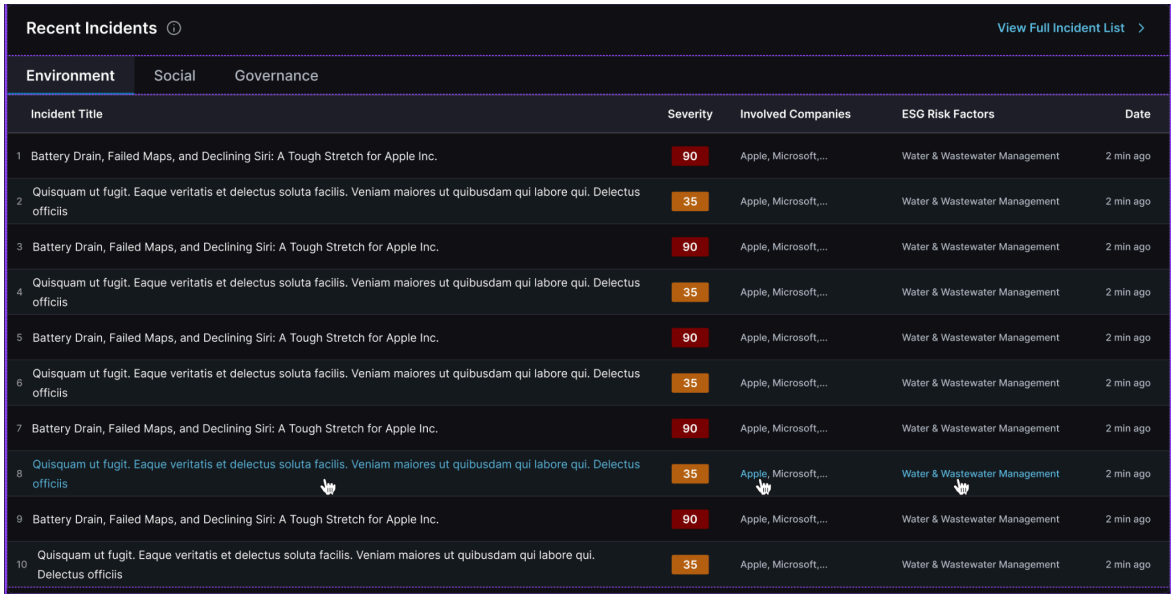
This real-time feed shows the latest ESG incidents with the highest severity scores.



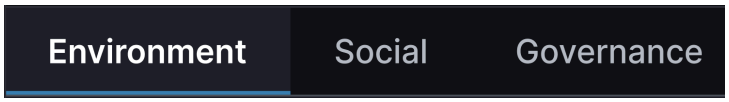

### Recent Incidents

This section breaks down the recent incidents affecting the company by category (environment, social, governance).

Each row shows the incident headline, severity score, the companies involved in the incident, related ESG risk factors, and incident timestamp.



Use the tabs at the top to switch between data for each ESG category.




In the table, click on:

- An **Incident Title** to view the full Incident Details page.
- An **Involved Company** to see its full company page.
- An **ESG Risk Factor** to head to the Incident Analyzer.
- The **View Full Incident List** button in the top right-hand corner to see your Incident List.

## Stock Price & Incidents

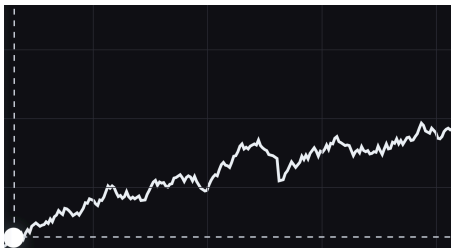
This chart combines stock price and incident data to show how fluctuations in ESG incident levels may be impacting the company's stock price over time.

***No Incidents?*** *If there's no incident data available for the time range you've selected, the chart will only show the company's stock price.*

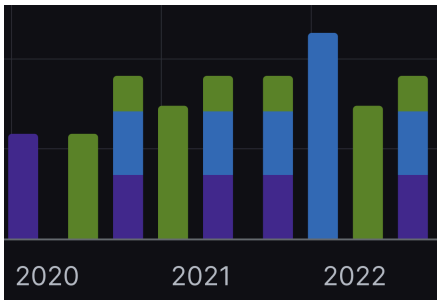
**This chart shows:**

The company's stock volume.

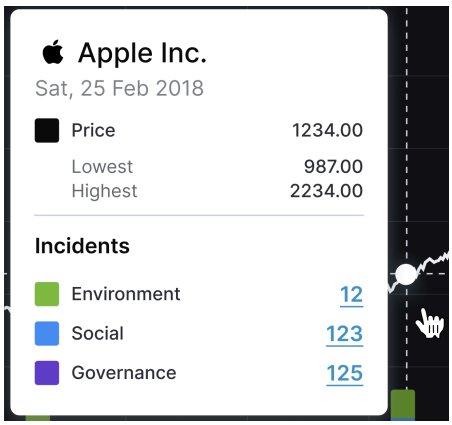
The company's stock price.



The number of ESG incidents the company has been involved in (color-coded by category).




Hover over the chart to view the company's stock price, highest and lowest prices, and ESG incident count (by category) for a certain date.




Click on an incident category counter to open your Incident List.

Click on the **expansion icon** in the top right-hand corner to see a more detailed version of this chart.

## Risk Trend

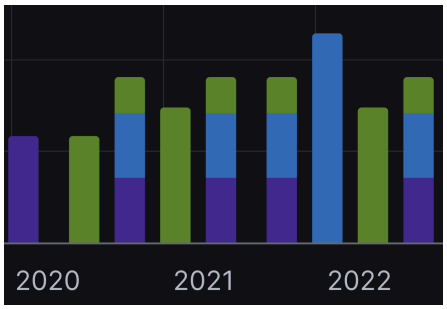
It may look like a stock chart, but this one tracks the company's ESG risk level; not its stock price.

**This chart shows:**

The company's ESG risk trend (simplified).

The company's ESG risk trend.

The number of ESG incidents the company has been involved in (color-coded by category).




Hover over the chart to view the company's ESG risk trend, highest and lowest risk levels, and ESG incident count (by category) for a certain date.

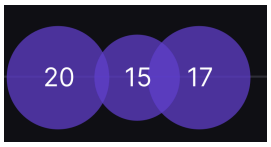
Click on an incident category counter to open your Incident List.

Click on the **expansion icon** ⤢ in the top right-hand corner to see a more detailed version of this chart.

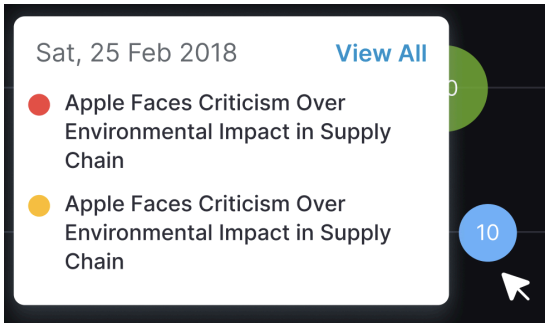
## Incident Timeline

This chart shows the frequency of incidents the company has been involved in over a selected time range. It's useful for seeing when and how often incidents occur within each ESG category.

The circles are color-coded by ESG category and show the number of incidents that occurred within a certain timeframe.




Hover over a circle to see a summary of the incidents (color-coded by severity level) that contributed to the timeline on a certain date.



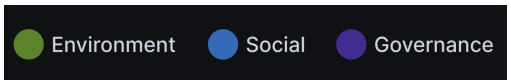

Click **View All** to open your Incident List.

## Incident Coverage Distribution Over Time

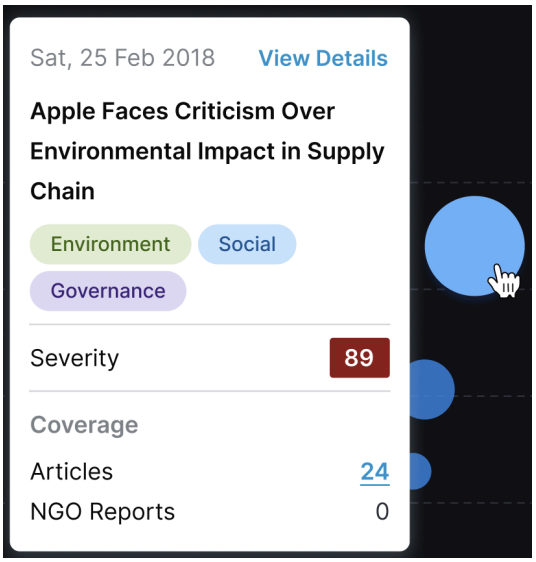
This chart shows the distribution of ESG incidents over a certain time period. The bigger the circle, the more serious the incident.

You can use the tabs above the chart to switch between viewing incident data by **ESG category** or severity level.

This will change the color-coding of the circles, with a key displayed below the chart.




Hover over a circle to see a summary of the incident, including its headline, related ESG categories, severity level, and coverage type.

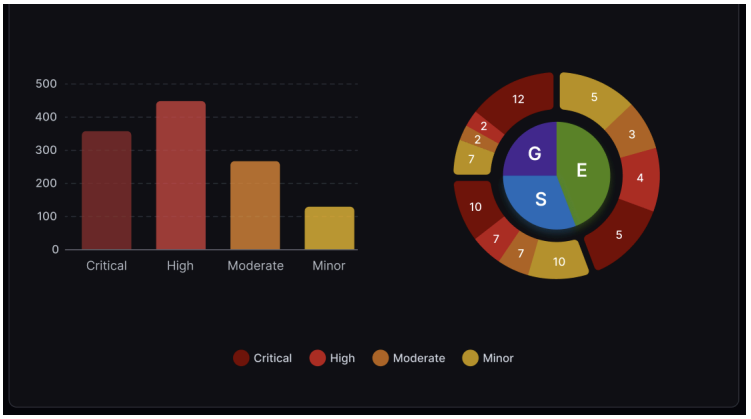



- Click on the coverage counter to see a full source list for the incident.

- Click **View Details** to open the Incident Details page.

## Incident Severity

This section shows the severity levels of ESG incidents over time.




The **bar chart** shows the number of incidents your company is involved in, categorized by severity level.

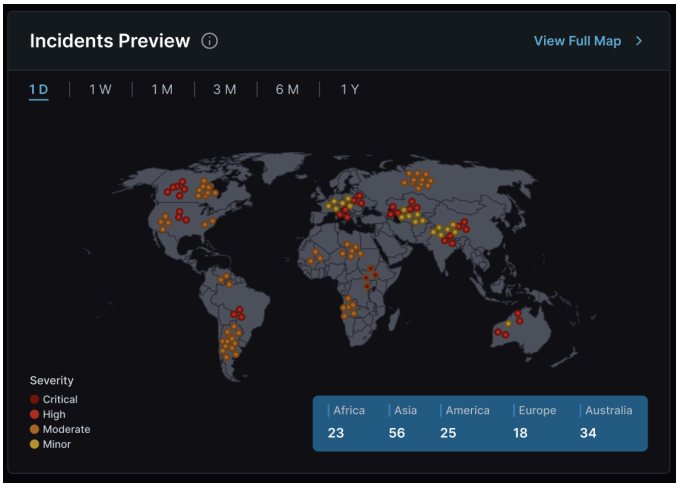
The **pie chart** breaks down these incidents by:

- Color-coded ESG category (central ring).
- Color-coded severity level (outer ring).
- Number (outer ring).

Incident severity levels in this section are color-coded, as shown by the key below.

## Incidents Preview

This map shows you where the ESG incidents the company is involved in are happening around the world.




Incidents are grouped and color-coded by their severity levels (bottom left), and the blue bar at the bottom shows how many incidents have occurred on each continent.

Click **View Full Map** in the top-right corner to expand the view and explore the data in more detail on a full world map.

## Incidents by ESG Categories

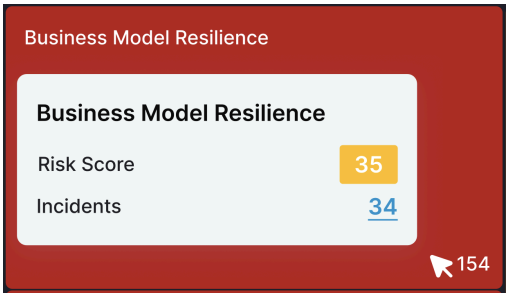
This tree map organizes incident types (small boxes) into ESG Categories (big boxes).

**Box size:** Shows how many times the incident type has occurred. The higher the frequency, the bigger the box.

**Box color:** Represents the incident severity level.

**Box number:** Tells you how many times an incident type has occurred.

**Hover over this chart to see:**




- The type of incidents that have occurred in each ESG category.
- The incident risk score for each ESG subcategory.
- The number of incidents that have occurred within the category. Click on this number to open your Incident List.

## Most Used Risk Factors

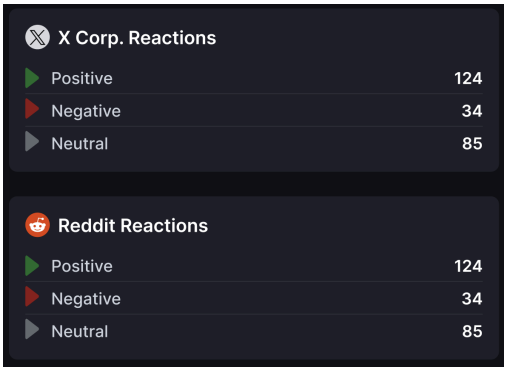
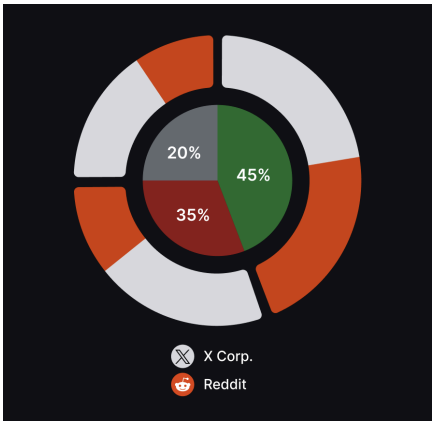
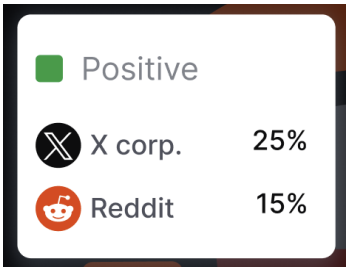
This section shows the ESG risk factors linked to the company's incidents as plain-text keywords.

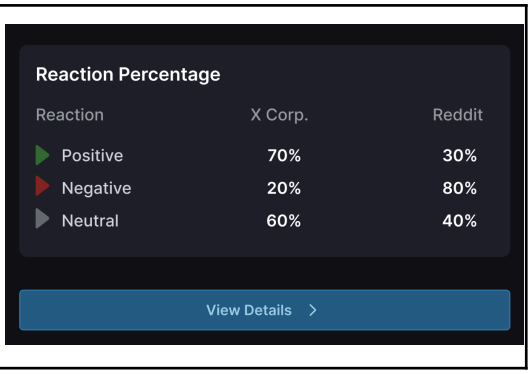
These risk factors are color coded according to their ESG category and organized by size; the larger the word, the more frequently the risk factor is tied to your incidents.

## 8.1.6 Social Media Coverage

ESG Sentinel monitors public opinion from Xcorp (formerly Twitter) and Reddit to provide real-time feedback on the company's ESG performance.

It analyzes users' reactions to emerging ESG incidents to gauge an overall percentage of positive and negative sentiment toward the company. In this section, you can view the results.

| | | |
|---|---|---|
| **Reactions** | This section shows the total number of reactions from Xcorp and Reddit to ESG incidents the company has been involved in, categorized into **Positive**, **Neutral**, or **Negative** reactions. |  |
| **Pie Chart** | **1.** The double pie chart provides a detailed breakdown of this social media sentiment.<br><br>- The **central pie chart** shows the percentage of social media reactions that are positive (green), negative (red), or neutral (gray).<br><br>- The **outer chart** shows how much of each reaction type is attributed to XCorp or Reddit.<br><br>**2.** Hover over the pie chart to see a breakdown of each section. | **1.**<br>  <br>  |

| | | |
|---|---|---|
| **Reaction Percentage** | This displays the pie chart data in plaintext, showing the exact percentage of positive, negative, and neutral sentiment for each site (XCorp and Reddit).<br><br>*Click **View Details** to open the [Social Media Coverage](#) page.* |  |

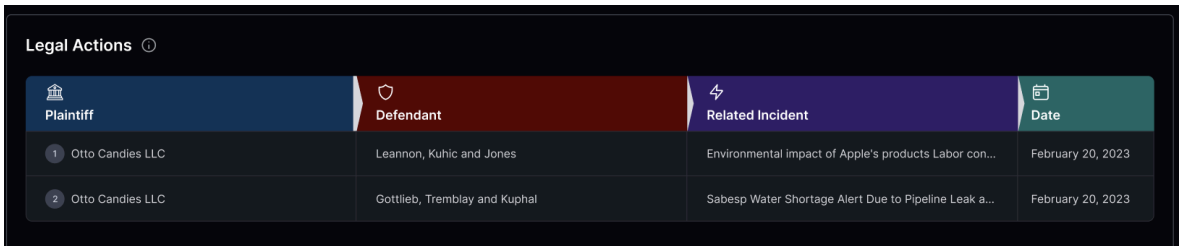
## 8.1.7 Regulatory & Legal Actions

This section provides details on legal actions being taken against the company and fines you've been issued for ESG incidents. It's divided into two parts.

### Legal Actions

This table displays any legal actions being taken against the company. Each row includes:

**Plaintiff:** The name of the company or entity filing the action.
**Defendant(s)**: The name(s) of the company or parties being accused.
**Incident:** A brief description of the incident leading to the legal action.
**Date:** When the legal action was started.

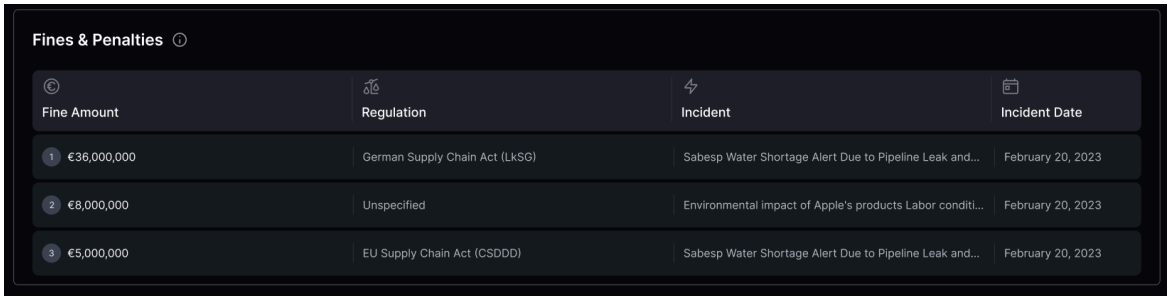



Click on an incident headline to open the [Incident Analyzer](#).

### Fines and Penalties

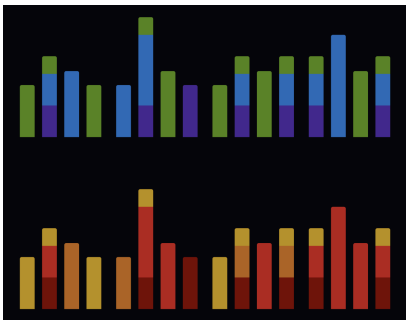
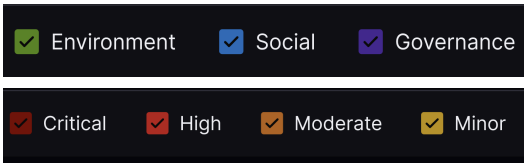
This section shows the fines and penalties the company has received. Each row includes:

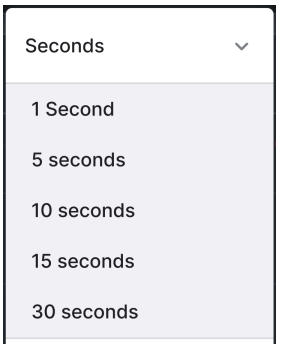
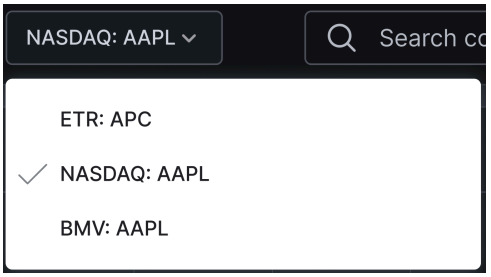
- Fine amount
- Breached regulation
- Incident name
- Date the incident occurred

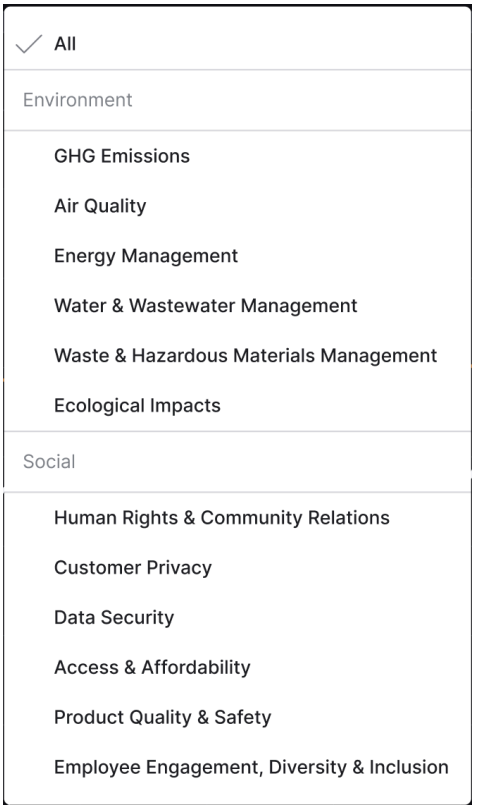


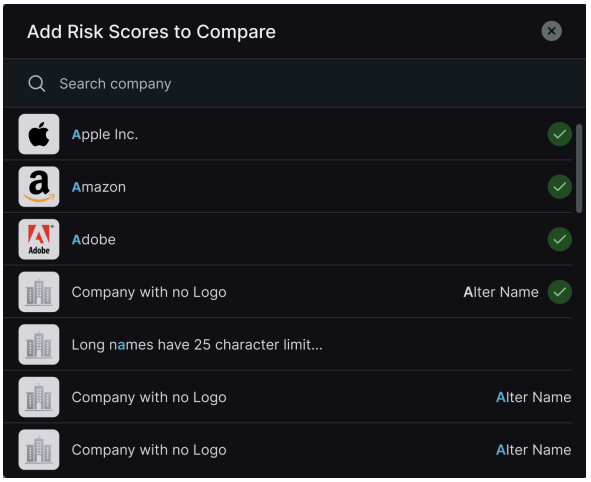
## 8.1.8 Stock Price & Incidents / Risk Trend: Full Chart View

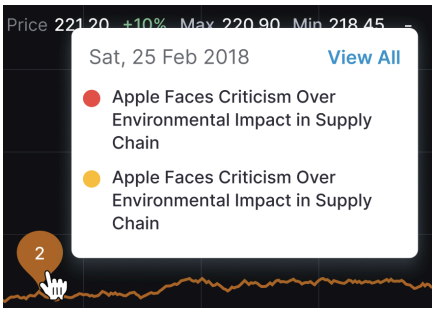
When you expand the Stock Price & Incidents or Risk Trend charts, you'll open a detailed view that gives you more control over how the chart is displayed and which data it shows you.

| **Filters**<br>Use these tools to customize the type of data that your chart displays. | | |
|---|---|---|
| **Toggle Bar Chart View** | Use the toggle at the bottom of the screen to switch the incident data in the bar chart between ESG categories and severity levels. |  |
| **Toggle ESG Categories** | Use the checkboxes at the bottom of the screen to choose which categories appear in the bar chart.<br><br>The options change based on your selected bar chart view (ESG Category or Severity). |  |

| | | |
|---|---|---|
| **Toggle Price / Risk Score** | Check the boxes (top right) to show the company's price and/or risk level on the chart. | |
| **Specific Time Range** | **1.** To choose a specific time range in seconds, minutes, hours, or days, click the calendar icon above the chart.<br><br>**2.** Select your desired time frame from the dropdowns below. | **1.**<br> <br><br>**2.**<br>  |
| **Ticker Symbol** | Click the dropdown menu above the chart and select an option to change the market displayed on the chart.<br><br>The selected market will appear as a white line on the chart. |  <br> |
| **Risk Category** | Click the **Risk Category** menu and select options to filter the ESG subcategories shown on the chart. Click **All** to display data for all subcategories. | |

| | | |
|---|---|---|
| | |  |

| **Comparing Companies**<br>The expanded view of the **Stock Price & Incidents** and **Risk Trend** chart lets you compare the risk scores of different companies. Here's how. | |
|---|---|
| Click the **Add Risk to Compare** button at the top of the chart. | |
| The company search box will open.<br><br>Select companies from the dropdown menu or start typing a company name and choose it when it appears.<br><br>Green check marks will appear next to your selected companies. |  |
| **1.** Your chart will now display the risk scores of the selected companies alongside your stock price. | **1.** |

| | |
|---|---|
| The lines are color-coded and labeled, so you can easily tell the difference between them and track each company's risk score over time.<br><br>**2.** The risk number in the label tells you the company's current risk score. | <br>**2.**<br> |
| Your selected companies also appear as tabs at the top of the chart.<br><br>Click the **X** symbol on a company tab to remove it from the chart, or check the box to add it. | |
| Hover over the company's risk score line to see specific incident summaries and their severity levels for a certain date.<br><br>Click **View All** to open your [Incident List](). |  |
| **1.** Hover over another company's line on the chart to see its risk score and price on a certain date, along with a breakdown of its ESG incidents by category.<br><br>**2.** Once you've added other companies to the chart for comparison, you'll see their risk scores appear on hover, under **Company Risk**. | **1.**<br> <br>**2.**<br> |

| Toolbar | | |
|---|---|---|
| **Zoom In/Reset** | Click the magnifying glass with the plus symbol to zoom in, or click the minus symbol to reset the view. | |
| **Horizontally Select** | Click this button to open a lasso tool, which you can use to select portions of the chart horizontally. | |
| **Change Style** | Click this button to switch between chart styles: line chart, line chart with markers, or candle chart. | |
| **Save as Image** | Click this button to save your current chart view as an image. | |

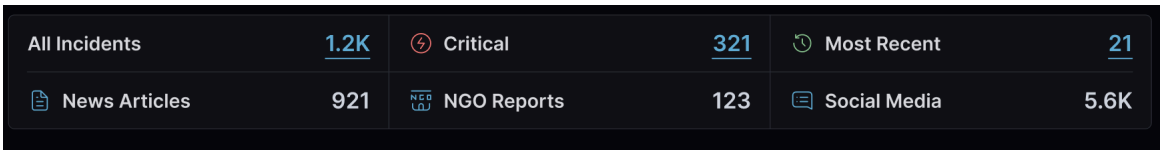
## 8.2 Supply Chain

The **Supply Chain** tab of the **Company Page** provides key ESG risk intelligence on your searched company's supply chain. It breaks down into the following sections:

- Overview
- Risk Analysis
- Breaches & Violations
- Incident Analysis

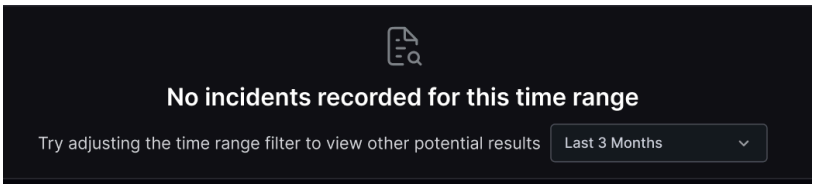
### 8.2.1 Overview

The table at the top of the **Overview** section shows a summary of the ESG incidents affecting the company's supply chain (top row) and the news sources reporting on these incidents (bottom row).



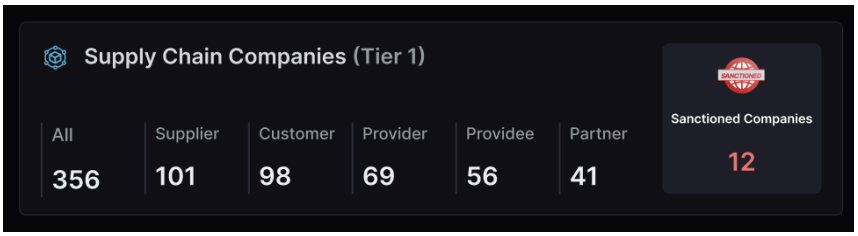

*Click on the incident number counters to open the Incident List.*

***No Incidents?*** *If no incident data is available, an alert will appear to suggest a new time range, which you can choose from the dropdown menu.*

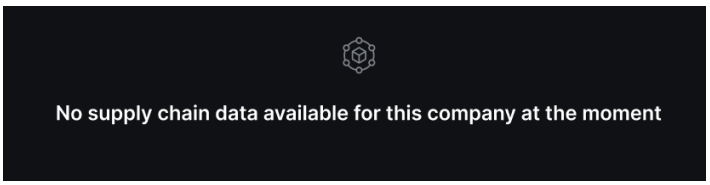



#### Supply Chain Companies

This section tells you how many companies are in your searched company's supply chain, and further breaks this number down by relationship type. It also tells you how many companies in the supply chain have been sanctioned for regulatory breaches or violations.




*Note: If no supply chain data is available for your searched company, the Supply Chain tab toolbar will throw an alert.*



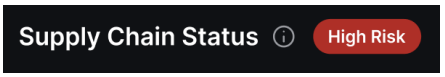

## Supply Chain Features

Click on these links to open the other supply chain features provided on ESG Sentinel:

- Supply Chain Graph
- Supply Chain Risk Diagram

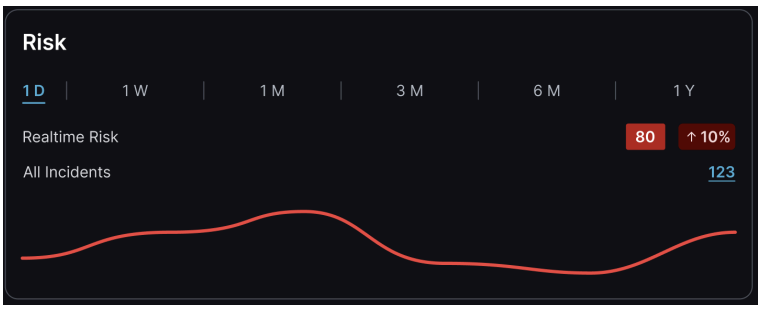
## Supply Chain Status

This is the overall ESG risk score for your searched company's supply chain. It's calculated in real-time by ESG Sentinel based on incoming risk intelligence.



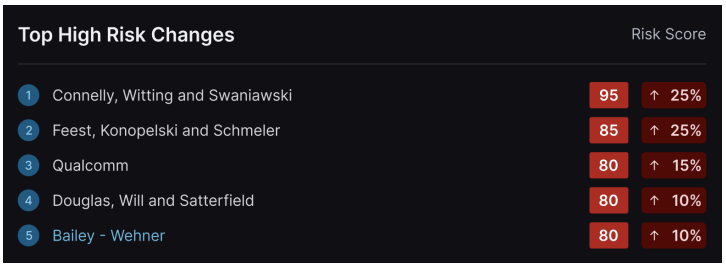

## Risk

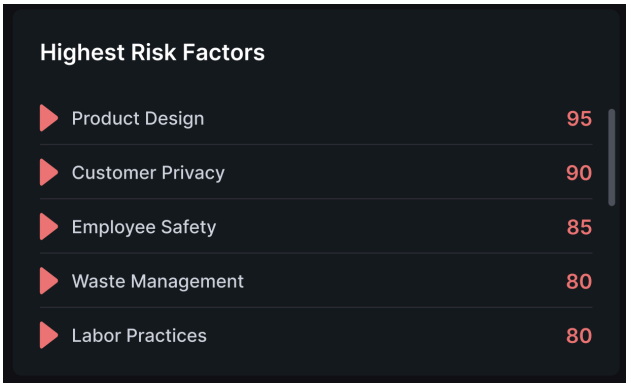
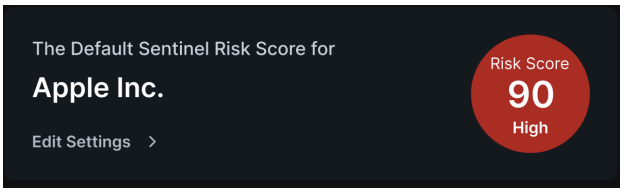
This line chart displays the ESG risk level of your searched company's supply chain over time. It also shows the supply chain's current risk score, risk change, and its total number of incidents (click to open the Incident List).



## Top High Risk Changes

This section highlights the top five companies in your searched company's supply chain with the largest changes in risk status, ranked from highest to lowest. It shows their current ESG risk score and change indicators.




| **Supply Chain Risk Score**<br>The **Overview** section is home to your searched company's supply chain's real-time **ESG Risk Score**. This includes: | | |
|---|---|---|
| **Highest Risk Factors** | This lists the highest risk factors across the company's supply chain, along with their ESG risk scores. |  |
| **Default Risk Score** | This is the supply chain's default ESG risk score. It's calculated in real-time by ESG Sentinel based on incoming risk intelligence. |  |
| **ESG Risk Score** | **1.** This pie chart breaks down the supply chain's ESG risk score into more detail.<br><br>It shows:<br><br>- The supply chain's overall ESG risk score (center).<br><br>- Risk scores for each main ESG category (inner ring).<br><br>- Risk scores for ESG | **1.** |

subcategories (outer ring).

**2.** The color-coded arrows show the level of risk that each ESG sub-category contributes to the supply chain's overall risk score.

**3.** Hover over each section of this chart to see a breakdown of:

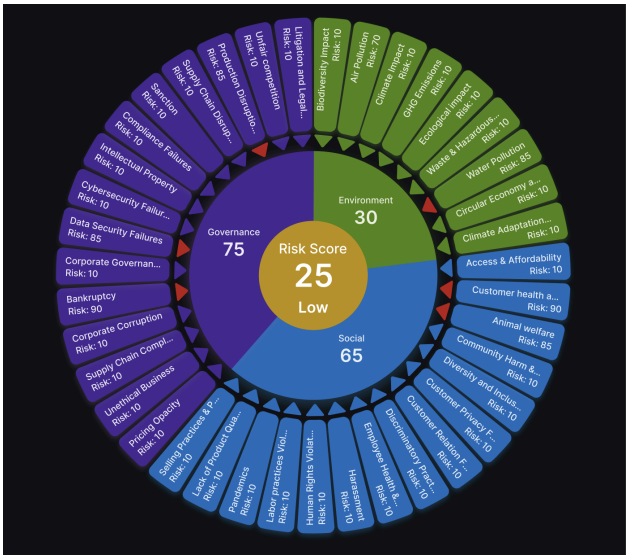
- The number of incidents in that category (click to open your Incident List).

- Key factors influencing the category's risk score.

- The category's customized risk score and any changes (if applicable).

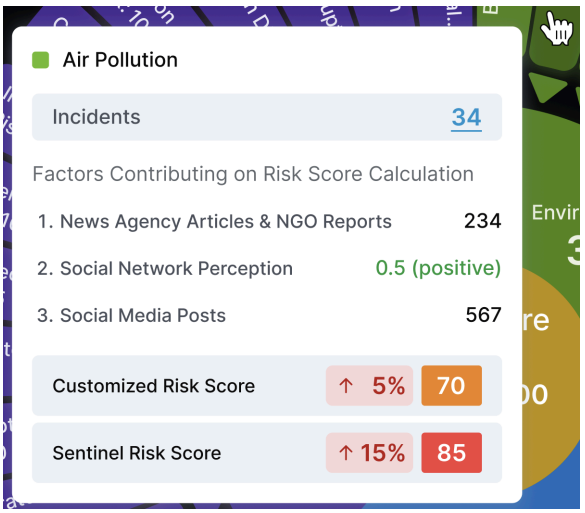
- ESG Sentinel's default risk score for the category and any changes.

**4.** If there's no incident data available for your chosen time range, the ESG risk score chart will not show any information.

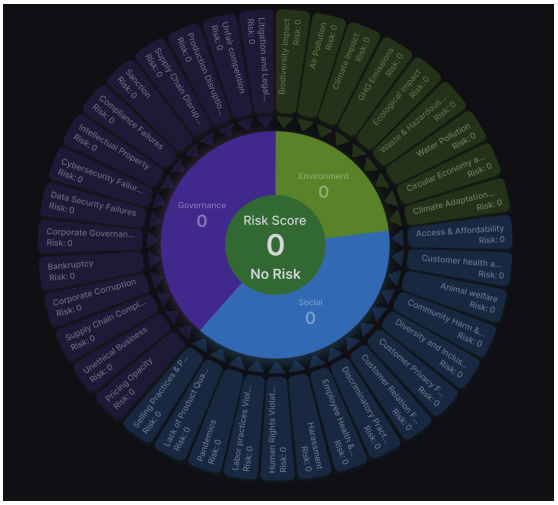



**2.**

**3.**



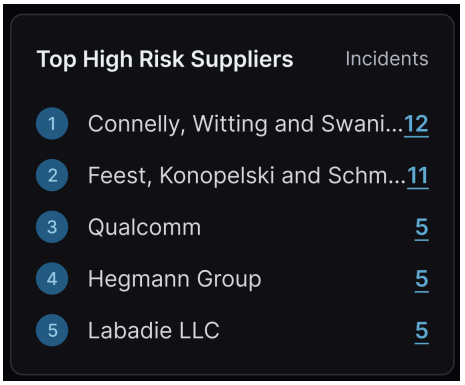

**4.**

| | | |
|---|---|---|
| | |  |

## 8.2.2 Risk Analysis

This section displays the ESG risk levels for each type of company within the supply chain. Companies are categorized by relationship type; including suppliers, customers, providers, providees, and partners.

| | | |
|---|---|---|
| **Real Time Risk Levels** | **1.** These charts show the real-time ESG risk levels for each relationship type in your searched company's supply chain (suppliers, customers, providers, providees, partners).<br><br>They display the current risk level, risk change indicators, and total incident counts (click to open your Incident List) for the companies within each relationship category.<br><br>*Note: Click on these charts to open a more detailed view.* | **1.**<br> <br><br>**2.** |

| | | |
|---|---|---|
| | **2.** Hover over the timeline to see the risk score on a certain day. | |
| **Top High Risk Companies** | This section lists the top five companies in each supply chain category that have experienced the most incidents.<br><br>*Click on the incident figures to open your [Incident List](#).* |  |
| **Supply Chain Risk Score** | | |

| | | |
|---|---|---|
| **Company List** | This list ranks the riskiest companies in the supply chain.<br><br>From left to right, each row provides the following details:<br><br>- **Company name**<br>- **ESG risk level**<br>- **Risk level change**<br>- **Number of incidents**<br>- **Relationship type** (to your company)<br><br>Use the tabs to view the leaderboard for each supply chain relationship type.<br><br>*Click on the incident counter to open your [Incident List](#).* | |

Company List View All

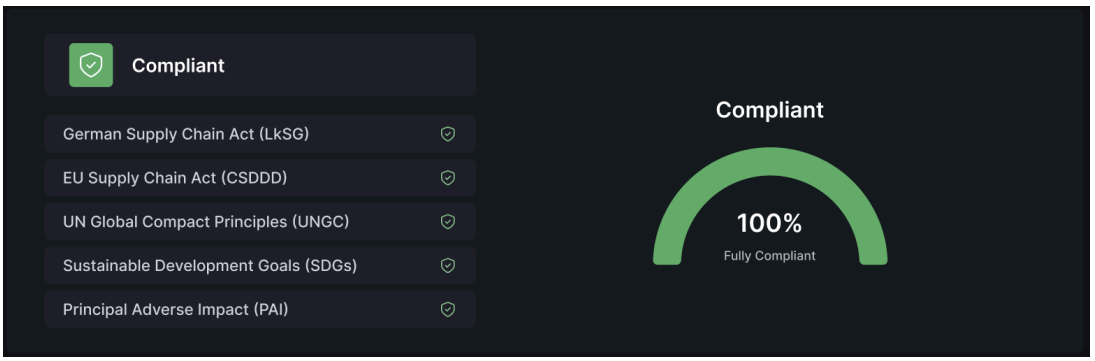
Supplier | Customer | Provider | Providee | Partner

| | Company | Risk Score | Risk Change | Incidents | Relationship Type |
|---|---|---|---|---|---|
| 1 | Apple | 90 | ↑ 10% | 128 | Customer (Tier-1) |
| 2 | Abbott Group | 90 | ↑ 10% | 98 | Partner research collab... |
| 3 | Grady, Schneider and Ortiz | 90 | ↑ 10% | 75 | Customer (Tier-1) |
| 4 | Runolfsdottir Group | 90 | ↑ 10% | 66 | Partner equity investm... |
| 5 | Feest, Konopelski and Schm... | 70 | ↓ 10% | 63 | Partner joint venture |
| 6 | Kihn, Rohan and White | 70 | ↓ 10% | 55 | Customer (Tier-1) |
| 7 | Connelly, Witting and Swania... | 70 | ↓ 10% | 40 | Partner investors |
| 8 | Green - Stanton | 70 | ↓ 10% | 35 | Partner integrated prod... |
| 9 | Schowalter LLC | 70 | ↑ 10% | 33 | Customer (Tier-1) |
| 10 | Apple | 35 | ↑ 10% | 128 | Partner investors |
| 11 | Ruecker Inc | 35 | ↓ 10% | 20 | Customer (Tier-1) |
| 12 | Hoeger - Bogisich | 35 | ↑ 10% | 15 | Partner manufacturing |
| 13 | Fahey, Beer and Hudson | 15 | ↓ 10% | 12 | Partner technology |

## 8.2.3 Breaches & Violations

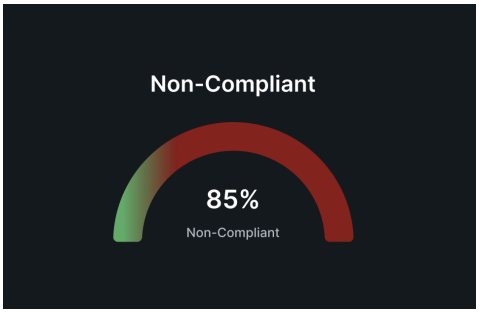
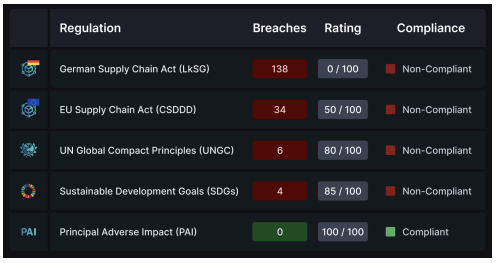
This section shows whether your searched company's supply chain is breaching key industry regulations. If it's non-compliant, this section reveals the severity of the breaches, the regulations and principles violated, and more specific breach details.

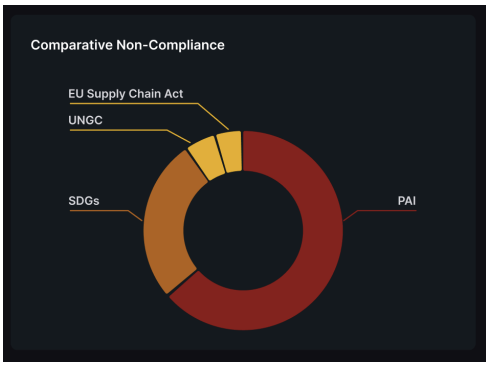
***Fully Compliant?*** *If your searched company's supply chain is fully compliant within your selected time range, you'll only see the* ***compliance overview*** *(see below for details). The rest of the sections in this tab will not appear.*

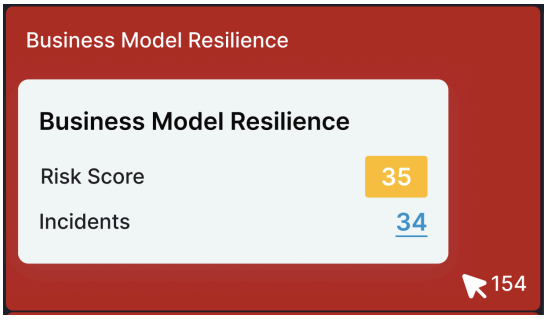
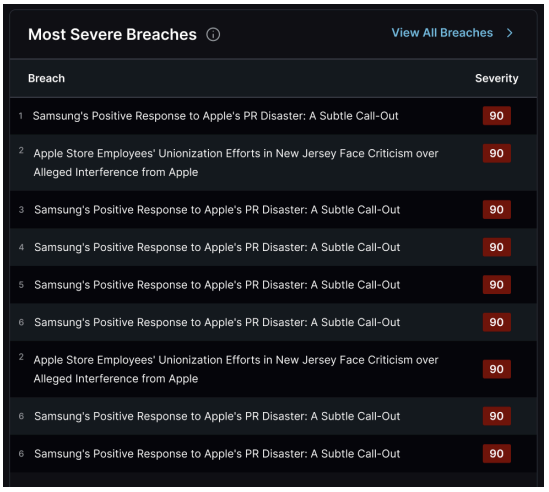



*Learn more about [regulations on ESG Sentinel](#).*

If the supply chain is non-compliant in some way, the **Breaches & Violations** tab will expand to show two key sections.

| Regulatory Compliance | | |
|---|---|---|
| **Compliance Overview** | This section provides a summary of the supply chain's regulatory compliance level.<br><br>**1. Table:** Lists the regulations the supply chain complies with (green check marks) and those it doesn't (red crosses).<br><br>**2. Dial:** Shows the supply chain's overall compliance percentage, with green for compliance and red for non-compliance. | **1.**<br> <br><br>**2.**<br>  <br> |
| **Breached Regulations** | This section offers a more detailed breakdown of which regulations the supply chain is breaching (if any) and to what extent. It includes two parts:<br><br>**1. Table**: Lists each regulation, showing: | **1.**<br>  <br> |

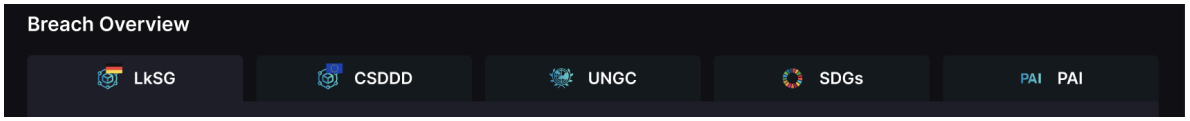
| | | |
|---|---|---|
| | - The number of breaches within a selected time range.<br>- The supply chain's compliance rating out of 100.<br>- The supply chain's overall compliance status (compliant or non-compliant).<br><br>**2. Comparative pie chart:** Compares the regulations the supply chain is breaching based on severity level (segment color) and number of violations (segment size). | **2.**<br>  <br> |
| **Top Breaches** | **1.** This tree map shows which regulations and principles the supply chain is breaching. The large boxes represent regulations, and the color-coded boxes inside them represent specific principles.<br><br>Regulations and principles are both organized in a hierarchy based on the number of times they've been breached.<br><br>**- Box size:** Shows how many times a regulatory principle has been breached. The more violations, the bigger the box.<br><br>**- Box color:** Represents the breach severity level.<br><br>**- Box number:** Tells you how many times a principle has been breached.<br><br>**2.** Hover over this tree map to see:<br><br>- The **names** of the principles the supply chain has breached.<br><br>- The **risk score** for each breached principle.<br><br>- The **number of times** the supply | **1.**<br> <br><br><br>**2.** |

| | | |
|---|---|---|
| | chain has breached each principle. Click on this number to open your Incident List. |  |
| **Most Severe Breaches** | This section lists the supply chain's most severe breaches, ranked from highest to lowest severity.<br><br>Each row includes details about the breach and its incident severity score.<br><br>Click **View All Breaches** in the top right-hand corner to open your Breach List. |  |

## Breach Overview

This section shows the supply chain's most recent breaches for each regulation and the types of breaches that occur most often.

Use the tabs at the top to view breach data for each regulation.



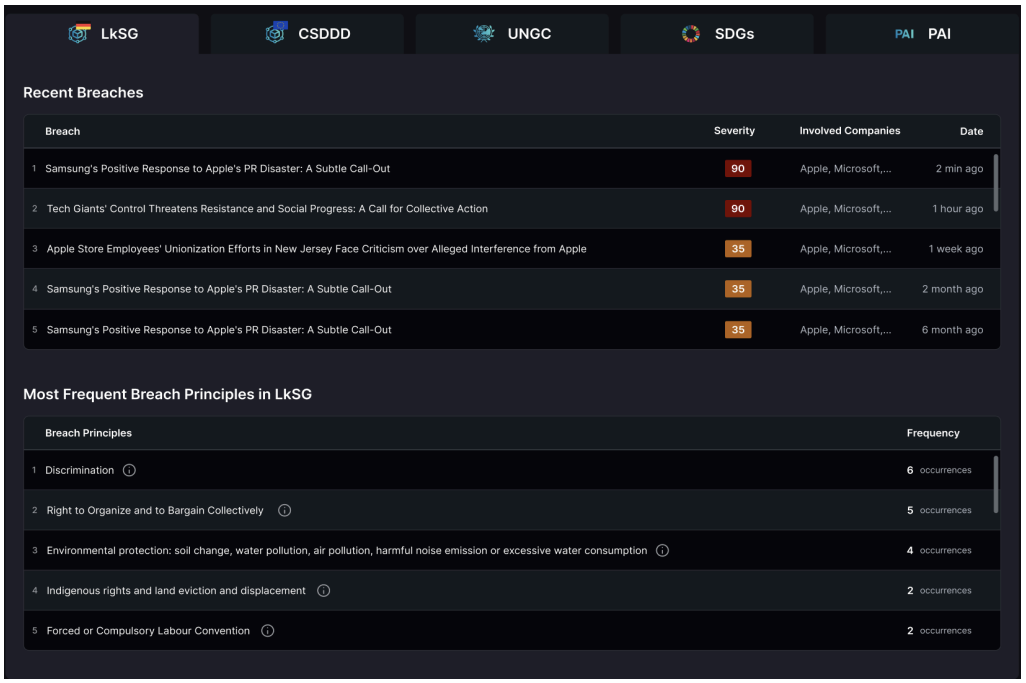

*Learn more about regulations on ESG Sentinel.*

These regulations are:

- German Supply Chain Due Diligence Act (LkSG)
- The Corporate Sustainability Due Diligence Directive (CSDDD)
- United Nations Global Compact (UNGC)
- UN Sustainable Development Goals (SDGs)
- Principal Adverse Impact (PAI)

Each regulation tab opens two tables: **Recent Breaches** and **Most Frequent Breach Principles**.

When you click on a tab, you'll see information specific to the selected regulation only.




**Recent Breaches**: Displays a real-time list of the supply chain's latest breaches under your chosen regulation. It includes the breach headline, severity level, involved companies, and time stamp.

**Most Frequent Breach Principles:** Shows the principles (of your selected regulation) that the supply chain has violated most often. The principles are listed on the left, with the number of breaches shown on the right. Click on the information symbol to find out more about a certain principle.

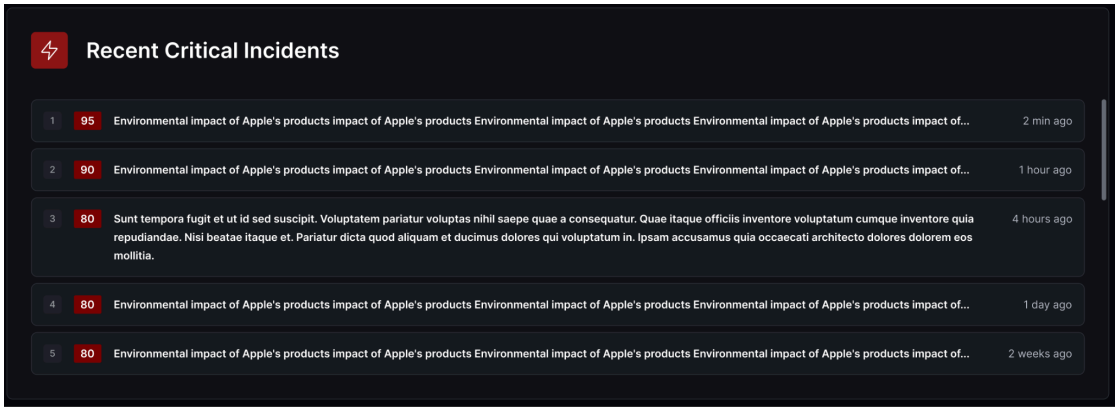
## 8.2.4 Incident Analysis

**Incident Analysis** provides detailed, real-time data on ESG incidents affecting your searched company's supply chain, including their time, date, type, location, severity, and market impact.

***No Incidents?*** *If there's no incident data available for the time range you've selected, this section will not appear.*

## Recent Critical Incidents

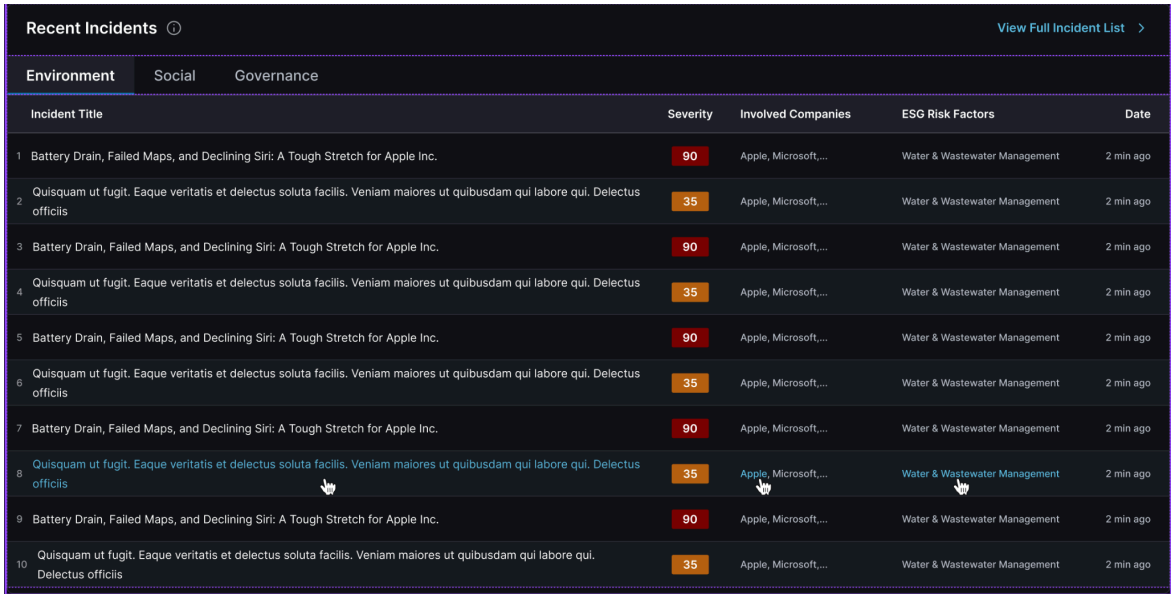
This real-time feed shows the latest ESG incidents with the highest severity scores. These incidents are likely to have the biggest impact on your searched company's supply chain.



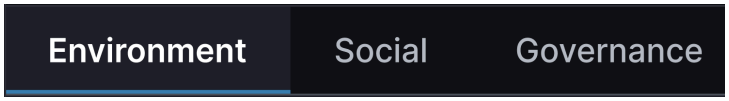

## Recent Incidents

This section breaks down the recent incidents affecting the supply chain by category (environment, social, governance).

Each row shows the incident headline, severity score, the companies involved in the incident, related ESG risk factors, and incident timestamp.



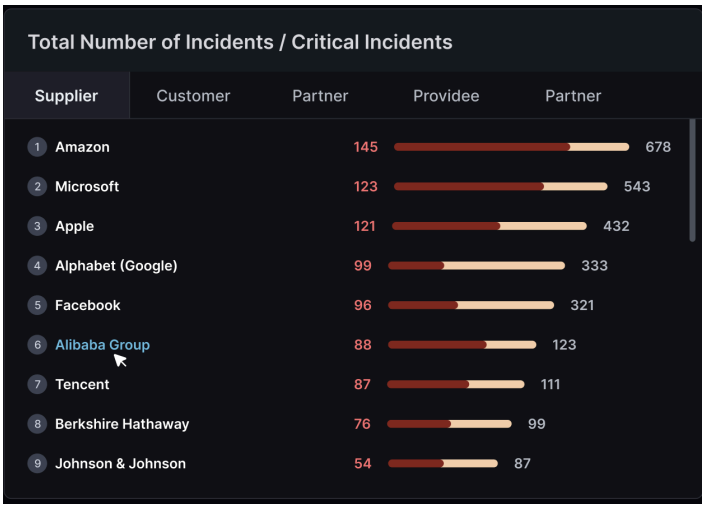

Use the tabs at the top to switch between data for each ESG category.



In the table, click on:

- An **Incident Title** to view the full Incident Details page.
- An **Involved Company** to see its full company page.
- An **ESG Risk Factor** to head to the Incident Analyzer.
- The **View Full Incident List** button in the top right-hand corner to open your Incident List.

### Total Number of Incidents / Critical Incidents




This section shows you how many incidents the companies in the supply chain have experienced (in beige), and the number of those classed as critical (in red).

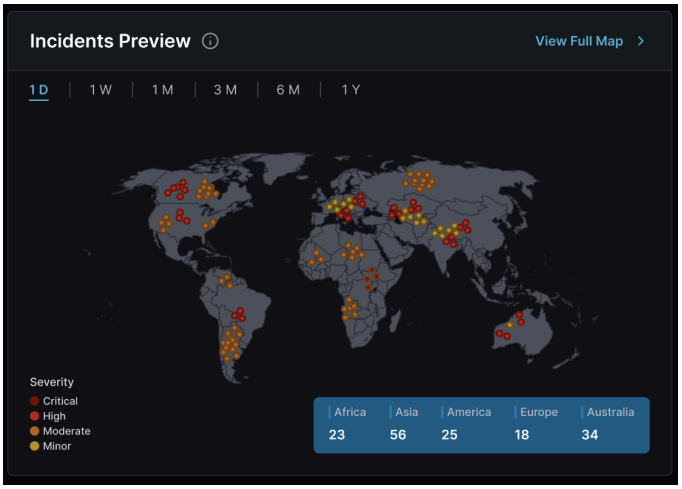
From the top down, companies are listed by those with the greatest number of incidents.

Use the tabs at the top of this section to switch between data for different relationship types in the supply chain.

Click on a company to see its full company page.

### Incidents Preview

This map shows you where the ESG incidents the supply chain is involved in are happening around the world.



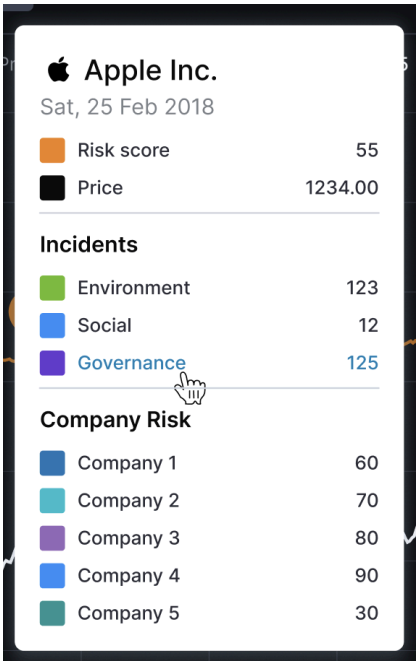

Incidents are grouped and color-coded by their severity levels (bottom left), and the blue bar at the bottom shows how many incidents have occurred on each continent.

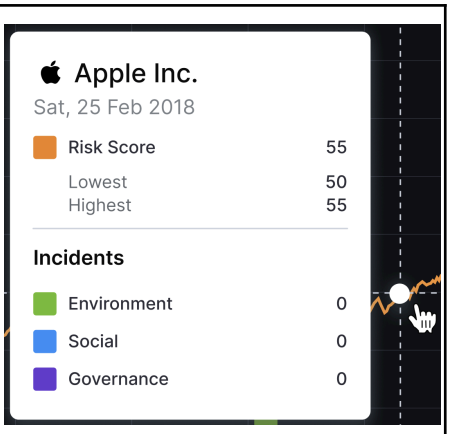
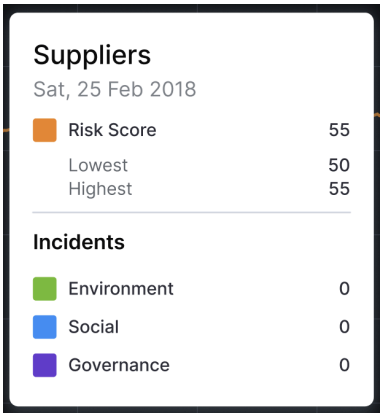
Click **View Full Map** in the top-right corner to expand the view and explore the data in more detail on a full world map.

## 8.3 Full Chart View (Stock Price & Incidents/Risk Trend/Risks & Incidents)

When you expand the Stock Price & Incidents, Risk Trend, or Risks & Incidents charts on the Company Page, you'll open a detailed view that gives you more control over how the chart is displayed and which data it shows you.

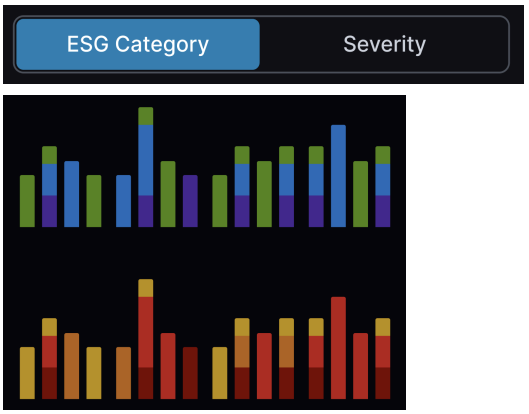
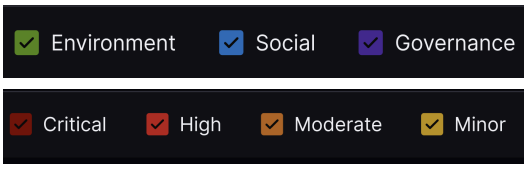
## 8.3.1 Hovering on the Charts

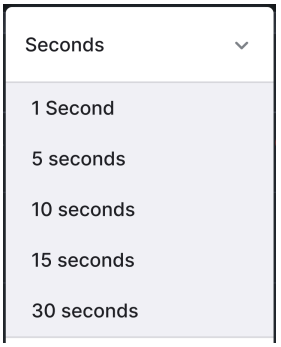
| | | |
|---|---|---|
| **Stock Price & Incidents** | **2.** Hover over the chart to see the company's risk score and price on a certain date, along with a breakdown of its ESG incidents by category.<br><br>If you've [added companies for comparison](), you'll see their risk scores appear under **Company Risk**. |  |

| | | |
|---|---|---|
| **Risk Trend** | Hover over the chart to see the company's ESG risk trend, highest and lowest risk levels, and ESG incident count (by category) for a certain date. |  |
| **Risks & Incidents** | Hover over the **Risks & Incidents** chart for a company to see the risk score for its suppliers (including the lowest and highest score) on a certain date, along with a breakdown of these suppliers' incidents by ESG category. |  |

## 8.3.2 Filters

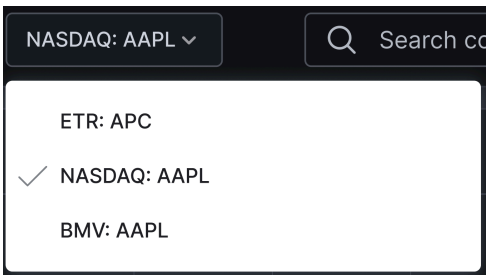
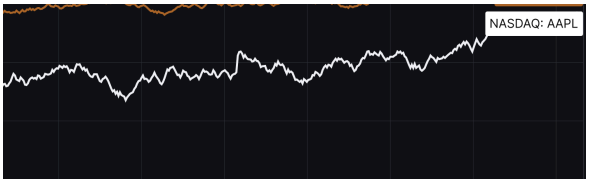
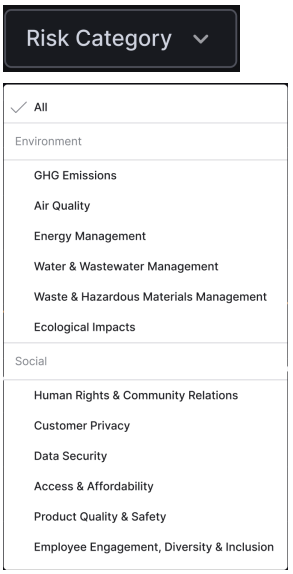
Use these tools to customize the type of data that these charts display.

| | | |
|---|---|---|
| **Toggle Bar Chart View** | Use the toggle at the bottom of the screen to switch the incident data in the bar chart between ESG categories and severity levels. |  |
| **Toggle ESG Categories** | Use the checkboxes at the bottom of the screen to choose which categories appear in the bar chart.<br><br>The options change based on your selected bar chart view (ESG Category or Severity). |  |

| | | |
|---|---|---|
| **Specific Time Range** | **1.** To choose a specific time range in seconds, minutes, hours, or days, click the calendar icon above the chart.<br><br>**2.** Select your desired time frame from the dropdowns below. | **1.**<br> <br><br>**2.**<br>  |

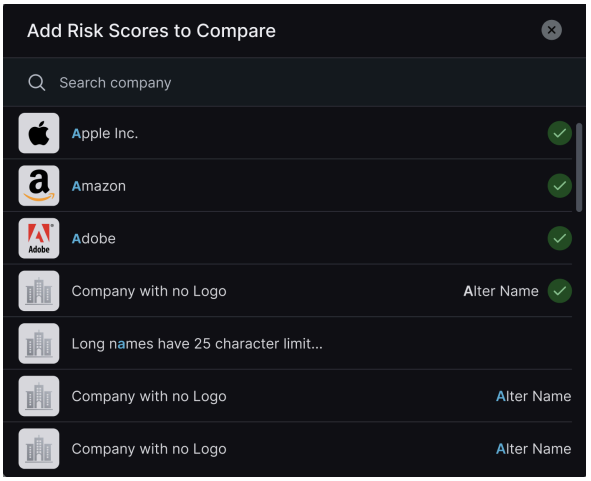
| 8.3.3 Toolbar | | |
|---|---|---|
| **Zoom In/Reset** | Click the magnifying glass with the plus symbol to zoom in, or click the minus symbol to reset the view. | |
| **Horizontally Select** | Click this button to open a lasso tool, which you can use to select portions of the chart horizontally. | |
| **Change Style** | Click this button to switch between chart styles: line chart, line chart with markers, or candle chart. | |
| **Save as Image** | Click this button to save your current chart view as an image. | |

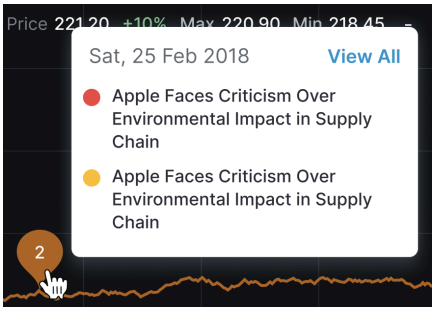
## 8.3.4 Filters (Stock Price & Incidents only)

| | | |
|---|---|---|
| **Ticker Symbol** | Click the dropdown menu above the chart and select an option to change the market displayed on the chart.<br><br>The selected market will appear as a white line on the chart. |  <br>  |
| **Risk Category** | Click the **Risk Category** menu and select options to filter the ESG subcategories shown on the chart. Click **All** to display data for all subcategories. |  |

## 8.3.5 Comparing Companies (Stock Price & Incidents only)

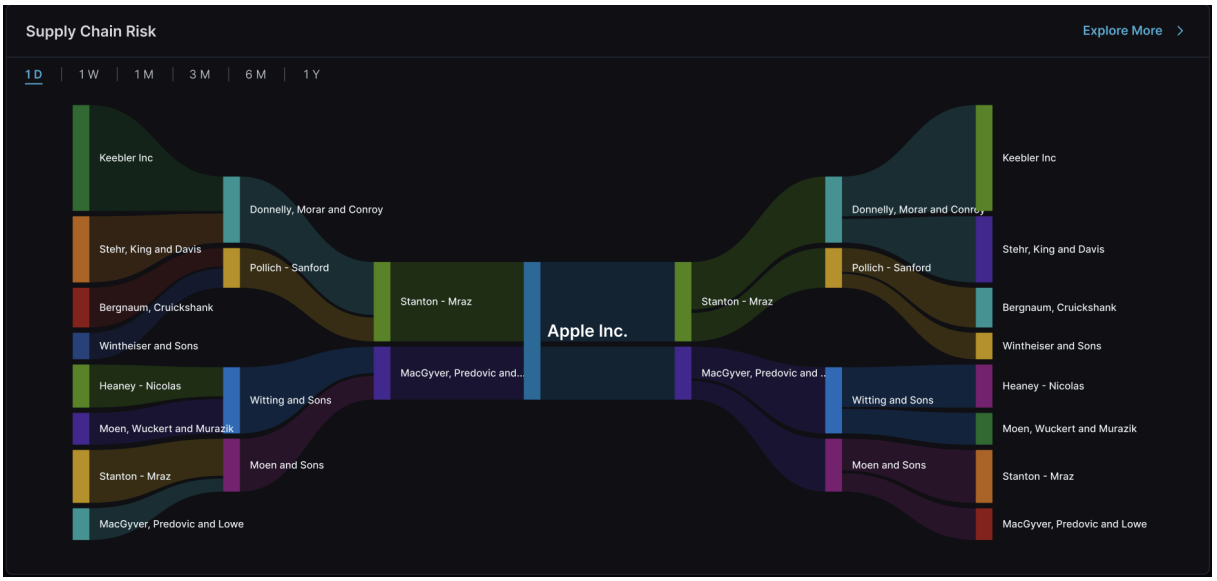
The expanded view of the **Stock Price & Incidents** chart lets you compare the risk scores of different companies. Here's how.

| | |
|---|---|
| Click the **Add Risk to Compare** button at the top of the chart. | |
| The company search box will open.<br><br>Select companies from the dropdown menu or start typing a company name and choose it when it appears.<br><br>Green check marks will appear next to your selected companies. |  |
| **1.** Your chart will now display the risk scores of the selected companies alongside your searched company's stock price.<br><br>The lines are color-coded and labeled, so you can easily tell the difference between them and track each company's risk score over time.<br><br>**2.** The risk number in the label tells you the company's current risk score. | **1.**<br> <br>**2.**<br> |
| Your selected companies also appear as tabs at the top of the chart.<br><br>Click the **X** symbol on a company tab to remove it from the chart, or check the box to add it. | |

| | |
|---|---|
| Hover over your searched company's risk score line to see specific incident summaries and their severity levels for a certain date.<br><br>Click **View All** to open your [Incident List](). |  |

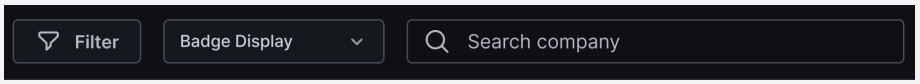
## 8.4 Supply Chain Risk

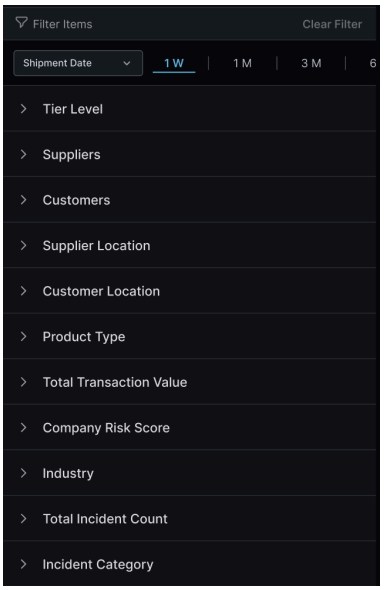
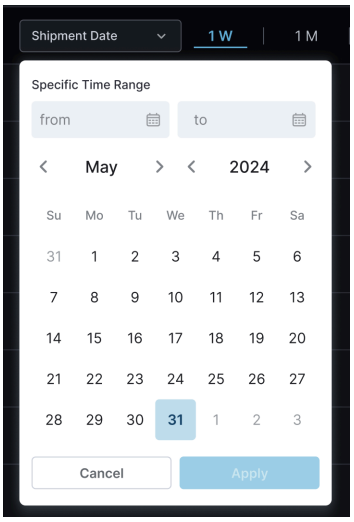
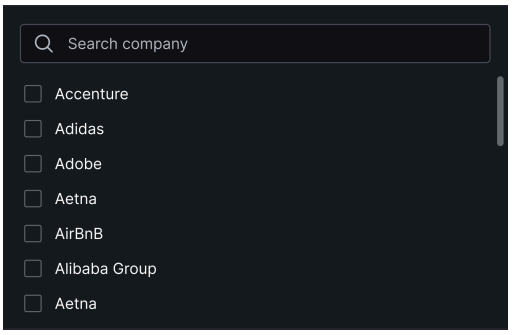
The **Supply Chain Risk** chart shows how your searched company's supply chain is connected, and how ESG risks can travel down the chain and impact it. The chart includes details on each related supplier, as well as the relationships between different companies.



## Supply Chain Risk: Toolbar

Use the toolbar at the top of the page to navigate the Sankey chart.




| | | |
|---|---|---|
| **Filter** | **1.** Click the **Filter** button to open a menu where you can choose what information shows up on your Sankey chart. | **1.**   |
| | **2.** Select the **Shipment Date** dropdown menu (top left) to pick a specific date range for your supply chain data.<br><br>Choose a start and end date, then click **Apply** to filter the results. | **2.**   |
| | **3.** Most of the dropdown menus under the **Filters** page feature checkbox options.<br><br>Check the boxes next to the filters you want to apply. You can also use the search bar to find specific options within each category. | **3.**   |

**4.** The left-hand counter (blue) shows how many options you've selected. Click **Clear All** to remove all your choices.

**5.** You can adjust the **Total Incident Count** and **Total Transaction Value** filters using the sliding scale or by manually entering minimum and maximum values.

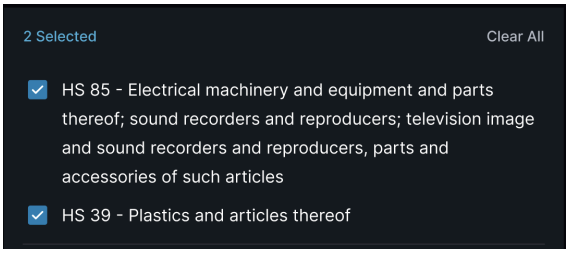
*Note: **Total Transaction Value** can only be shown in USD.*

**6.** Click **Clear Filter** to reset the filters you've already applied.

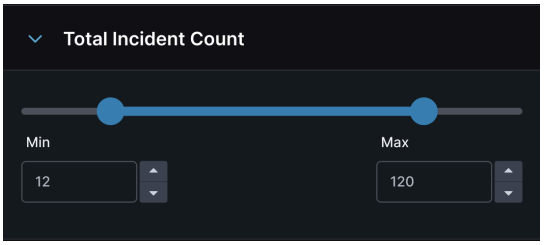
**7.** Select **Apply Filter** when you're ready to save your filters, or **Close** to leave the window (this will remove your filters).

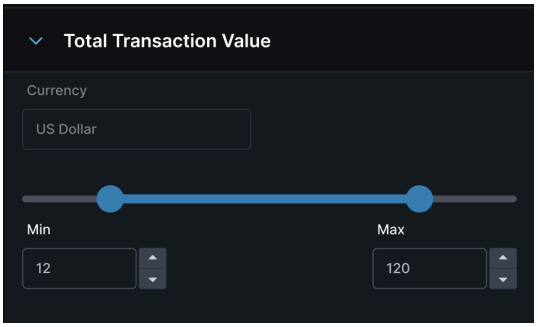
*Note: The Sankey displays up to **200 results at a time**. If your filters exceed this (shown by the white results counter), you won't be able to see all of your data on screen.*

**4.**

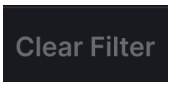



**5.**

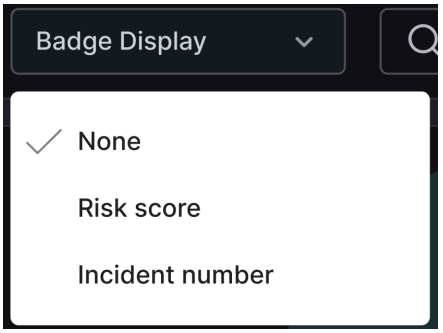



**6.**



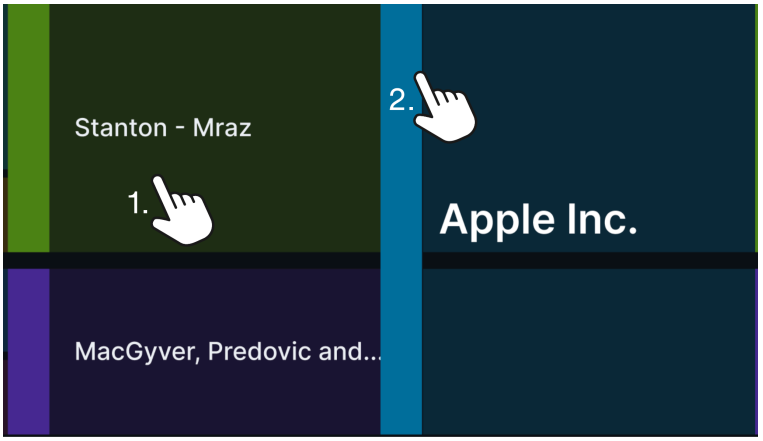

**7.**

| | | |
|---|---|---|
| **Badge Display** | Badges are small circular icons that appear on each company in the Sankey.<br><br>This dropdown option lets you choose what data is displayed on these badges.<br><br>You can select from:<br><br>**- None:** Don't show company badges (this the default setting).<br><br>**- Risk Score:** Display the company's ESG risk score.<br><br>**- Incident number:** Show how many incidents the company has experienced. |  |

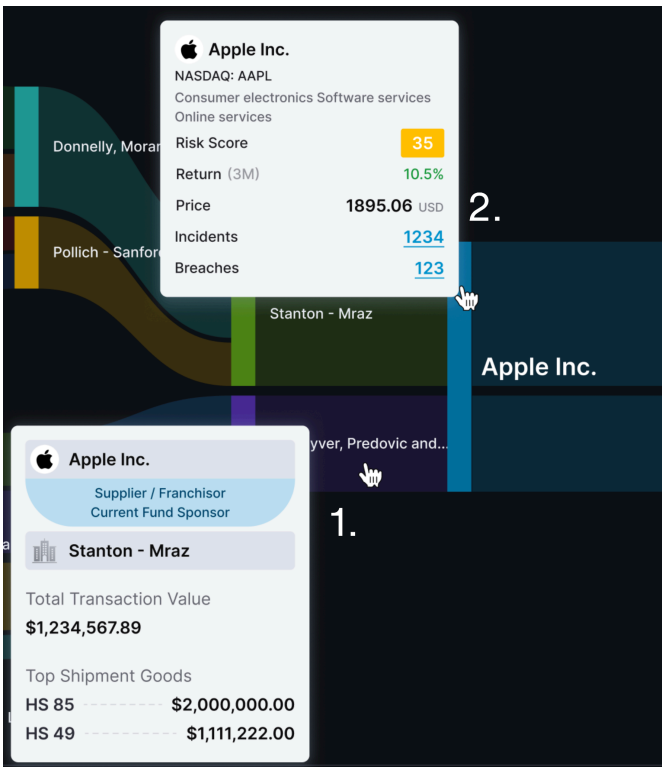
## Interacting with the Sankey

The Supply Chain Risk Sankey is made up of two main components:

**1. Relationships:** These tell you about the relationships between companies in the supply chain.
**2. Company Names:** These tell you about individual companies in the supply chain.



You can hover over **Company Names** and **Relationships** to see key details about the supply chain companies and how they're related.




**1.** Hover over a **Relationship** to see:

- The names of the connected companies.
- The relationship type.
- Total transaction value (USD).
- Total shipment goods (USD), including harmonized system (HS) equipment codes.

**2**. Hover over a **Company Name** to see its:

- Ticker symbol.
- Bio.
- ESG Risk Score.
- Return (as percentage).
- Stock price.
- Number of incidents (click to open the Incident List).
- Number of breaches (click to open the Breach List).

## Supply Chain Sankey: Full View

Click the **Explore More** button in the top-right of the Sankey overview to see a more detailed version.

Explore More >

From here, you can click on **Company Names** and **Relationships** to see their full details.

**Company Name**

Clicking on a **Company Name** reveals more details about the company, including:

**1. Company Overview:** The company's name, industry, bio, and location.

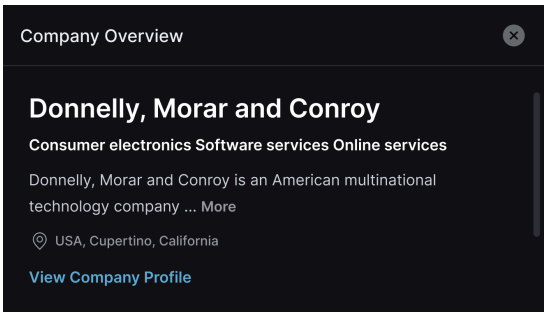
*Click **View Company Profile** to see the company's full page on ESG Sentinel.*

**2. Company ESG Risk Score:** The company's ESG risk score (color-coded by severity), its total number of incidents, and main incident categories.

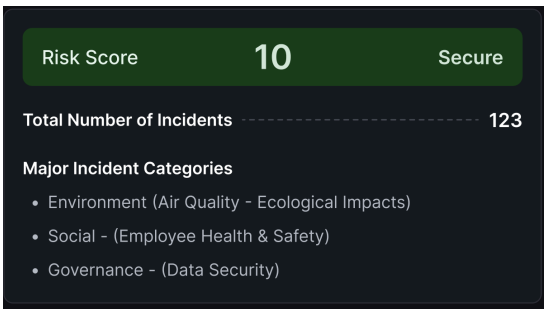
**3. Suppliers' ESG Risk Score:** The ESG risk score (color-coded by severity) for the company's suppliers.

Includes the company's total number of suppliers, the number of incidents related to these suppliers, and the main incident categories involved.

**1.**




**2.**




**3.**

**4.**

**4. Customers' ESG Risk Score:** The ESG risk score (color-coded by severity) for the company's customers.

Includes the company's total number of customers, the number of incidents related to these customers, and the main incident categories involved.

**5. Supply Chain Act Violations:** Lists all breaches of industry regulations within the company's supply chain, with each violation linking to related news reports and risk severity levels (in brackets).

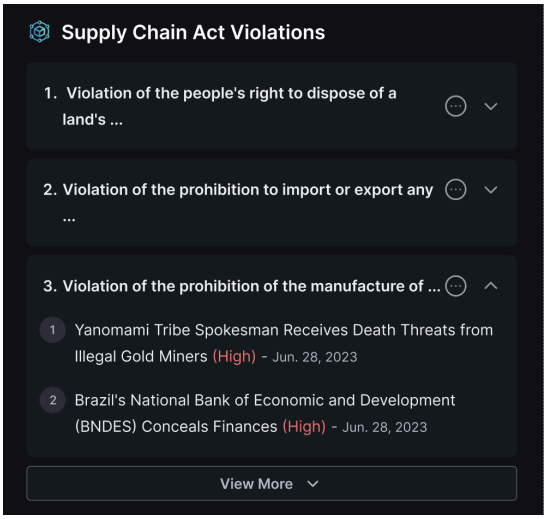
*Click on the three horizontal dots to see more information about each violation, or click **View More** to see the full list of violations.*

**6. Recent Incidents:** Displays a news feed of recent incidents affecting the company.

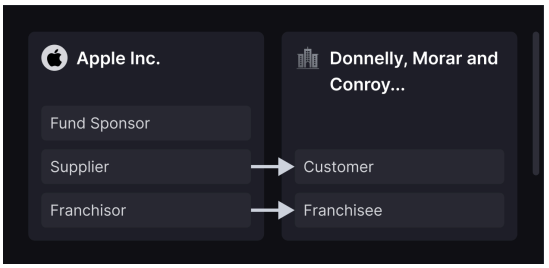
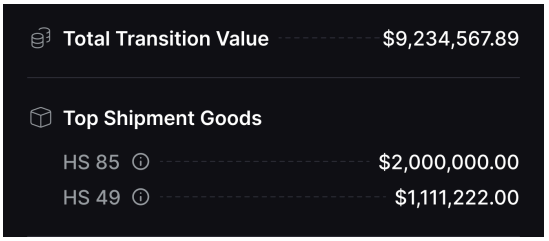
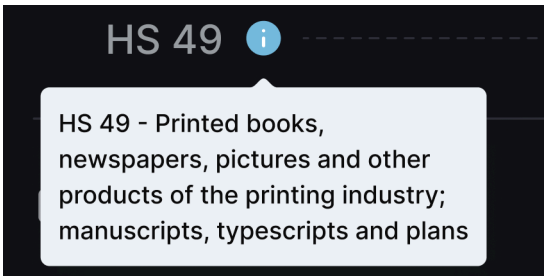
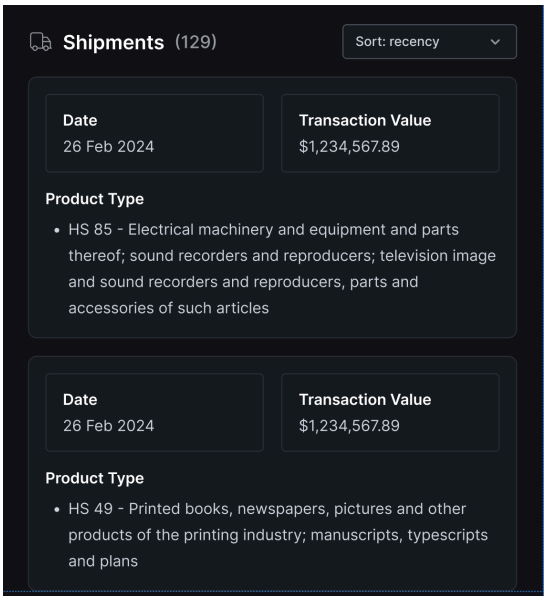
Each incident includes a headline, date, and a color-coded ESG risk score (in brackets).

*Click **View All** to open your Incident List.*

**5.**




**6.**

| | | |
|---|---|---|
| **Relationship** | Clicking on a company **Relationship** in the chart reveals more details about the connection between the two companies either side of it, including:<br><br>**1. Relationship Details:** Shows how the two companies are related in the supply chain. Each company's roles are listed under their name. A forward arrow means one company supplies the company it's pointing to.<br><br>*Note: In this example, Apple is a supplier and franchisor to Donnelly and Co., which is thereby a customer and franchisee of Apple.*<br><br>**2. Value:** This section shows the total transaction value between the two companies, along with the value of their top shipment goods, including relevant harmonized system (HS) codes.<br><br>Click on the **i symbol** to see more information about the harmonized system (HS) equipment category.<br><br>**3. Shipments:** This section shows the number of shipments between the two companies (in brackets). It also includes details like shipment date, transaction value (in USD), and product types (with HS code).<br><br>You can sort shipment data using the dropdown menu in the top right of the box.<br><br>Choose between the **Recency** or **Transaction Value** of shipments, and sort by **Ascending** or **Descending** order. | **1.**<br>  <br><br>**2.**<br>  <br><br>  <br><br>**3.**<br>  <br> |

# 9 Graph Exploration

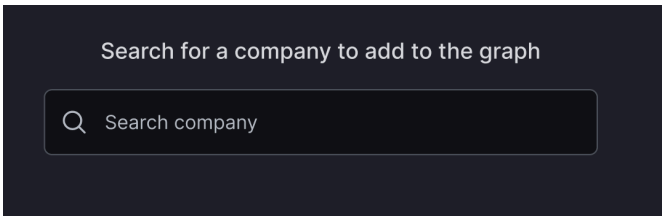
The **Graph Exploration** feature makes it easy to see how companies in a supply chain are connected. Displayed like a web, the graph traces relationships, transactions, incidents, and regulatory breaches between different companies in the chain; even at its farthest edges.

This feature lets you trace pathways between supply chain companies, identify high-risk suppliers, and see where ESG risks are emerging from. It ultimately lets you see how the actions of a company's suppliers, customers, and partners (for better or worse) may ripple through the supply chain and affect your investments.

## 9.1 Creating a Graph

When you first open **Graph Exploration**, your graph will be empty.

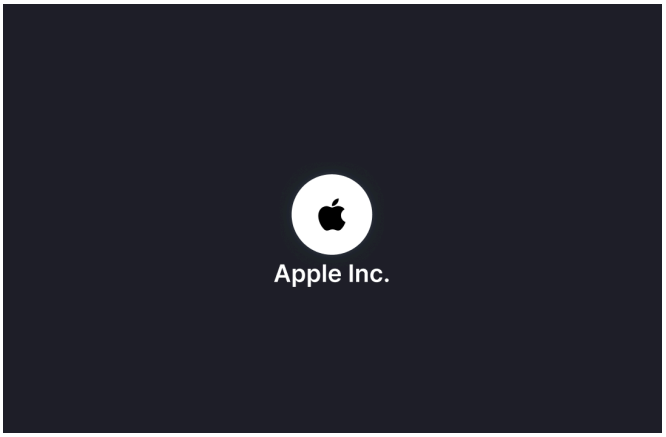
Use the search bar in the center of the screen to find a company. It will be the focal point of your graph, with its supply chain branching out from there.



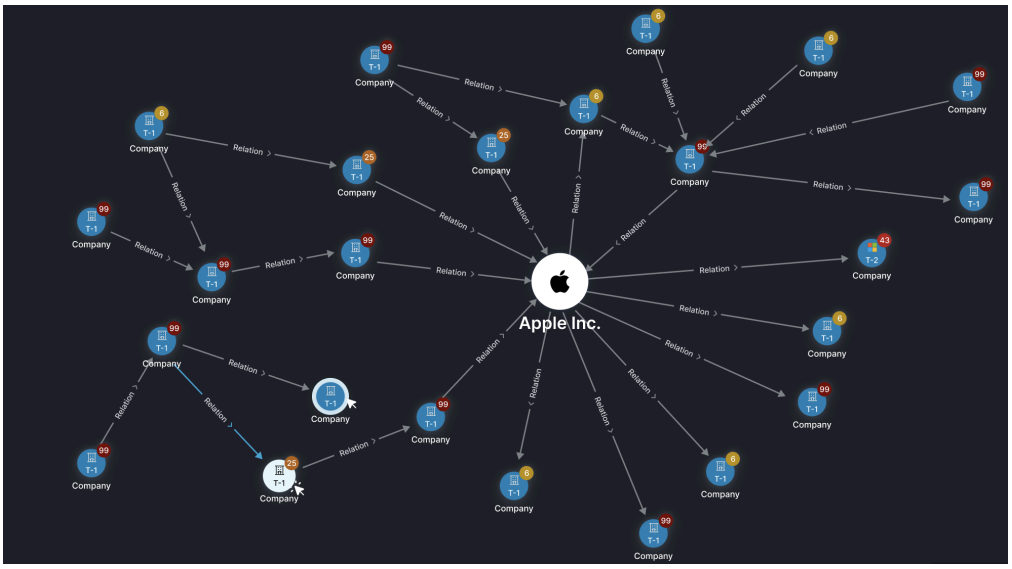

Start typing the company name and select the right option once it appears, then click the **+** symbol.

The company you select is marked by a check mark.

Your main company will appear in the center of the graph, and the search bar will disappear.

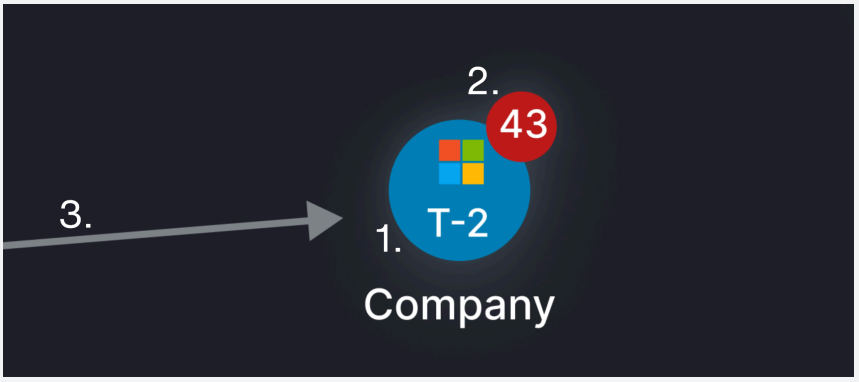



The company's supply chain (automatically detected and generated by ESG Sentinel) will be added, branching out from the center and displaying a web of connections.

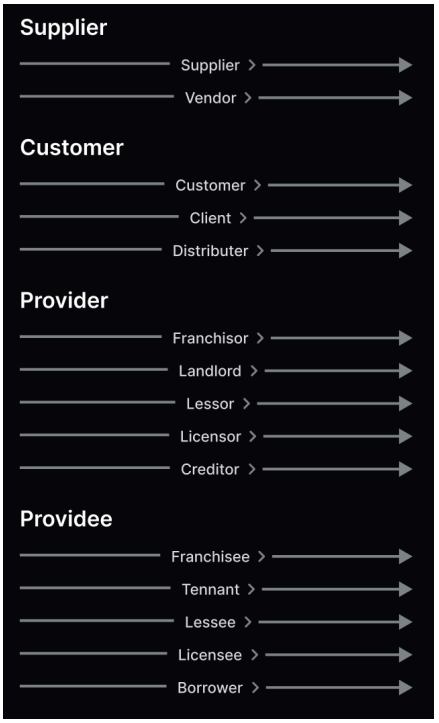


## 9.2 Reading the Graph

The graph includes **three main icons** that offer quick insights into a company's supply chain.

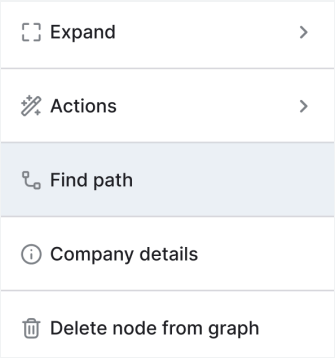


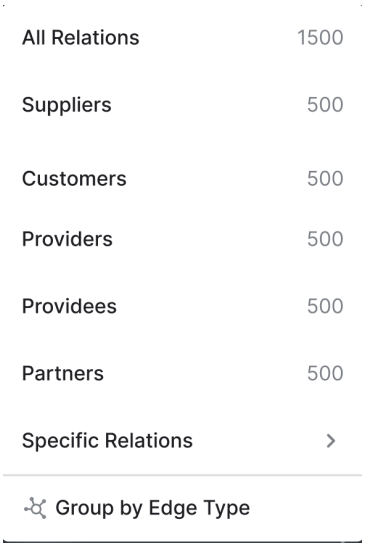

| | |
|---|---|
| **1. Companies** | Each company in the graph is shown as a blue circle (white when clicked). Each circle includes:<br><br>- Company logo (if detected by ESG Sentinel)<br>- Supply chain tier type (tiers 1-3)<br>- Company name |
| **2. Badges** | The small circles pinned to companies on your graph can tell you:<br><br>- The number of incidents the company has experienced (color-coded by severity).<br>- The company's color-coded ESG risk score.<br>- The number of connections the company has within your supply chain.<br><br>*Note: Badges can show only one statistic at a time. To switch what they display, click the **Badges Display** button in the toolbar and choose your preferred option. For more details, see the [Customizing the Graph](#) section.* |

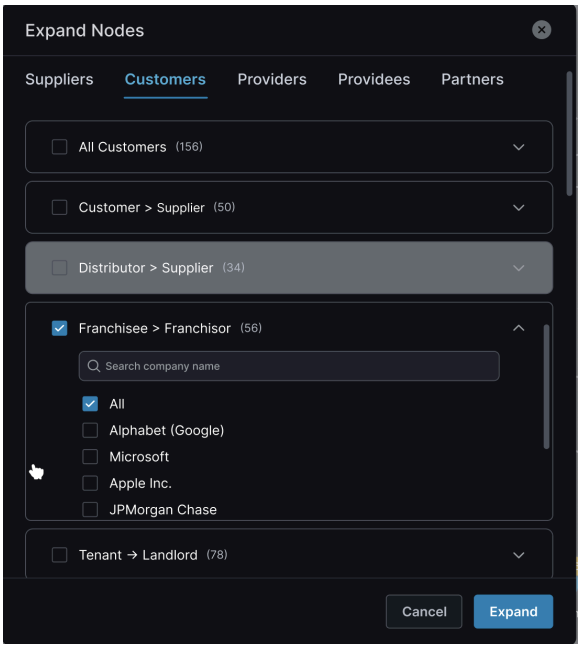
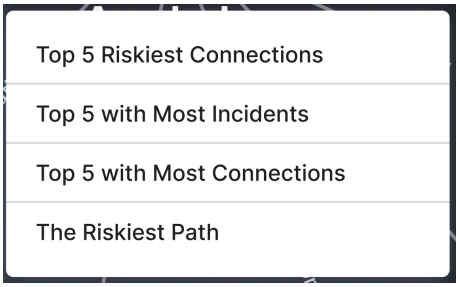
| | | |
|---|---|---|
| **3. Pathways** | The arrows on the graph show the relationships between companies. Here's what each part means:<br><br>**- Direction:** The direction of the arrow shows the relationship. A forward arrow means one company supplies the company it's pointing to.<br><br>**- Color:** Arrows are white by default, and turn blue when selected.<br><br>**- Labels:** Show the relationship between companies, specifying the role one company plays for the other (e.g., supplier, customer, partner) along with details of each specific role. |  <br> |

## 9.3 Interacting with the Graph

Right-click on a company (blue circle) to see more details about it and how it connects to other companies on your graph. When you click, a menu with various options will appear.



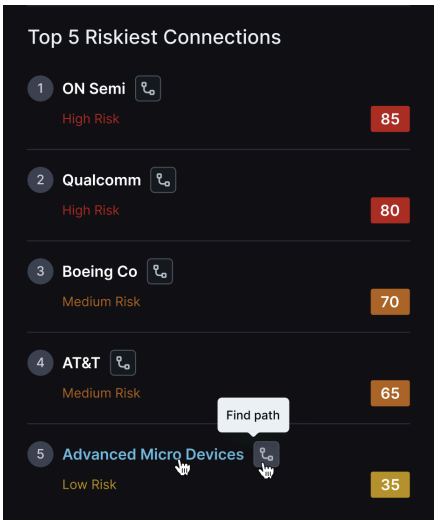

| | | |
|---|---|---|
| **Expand** | This option lets you reveal companies on your graph based on the relationships they have with one another.<br><br>**1.** When you click **Expand**, you open a list that breaks down the total number of connections (**All Relations**) on your graph into categories, showing how many are **Suppliers**, **Customers**, **Providers**, **Providees**, or **Partners**.<br><br>Click **Specific Relations** to reveal companies on your graph based on their relationships. | **1.**<br>  <br> |

| | | |
|---|---|---|
| | **2.** After clicking **Specific Relations**, use the tabs at the top to cycle through different relationship types.<br><br>On each tab, you can:<br><br>- Select a **relationship** to display all related companies on your graph.<br><br>- Select (or search for) **specific companies within a relationship** to show only those relevant connections.<br><br>*Note: The number in brackets indicates how many companies in your supply chain share that relationship.*<br><br>**3.** Once you've chosen your companies and relationships, click **Expand** at the bottom of the screen. If you want to exit without making changes, click **Cancel**. | **2.**<br>  <br><br><br>**3.**<br> <br> |
| **Actions** | **1.** This option lets you see details about companies on your graph that are in one of the following **top 5 lists**, and trace paths between them.<br><br>*Note: These lists are automatically compiled by ESG Sentinel.* | **1.**<br>  <br> |

**2. Top 5 Riskiest Connections:** This shows the five companies linked to your selected company with the highest ESG risk scores.

In this list, you'll see the top five companies' names and their color-coded risk scores.

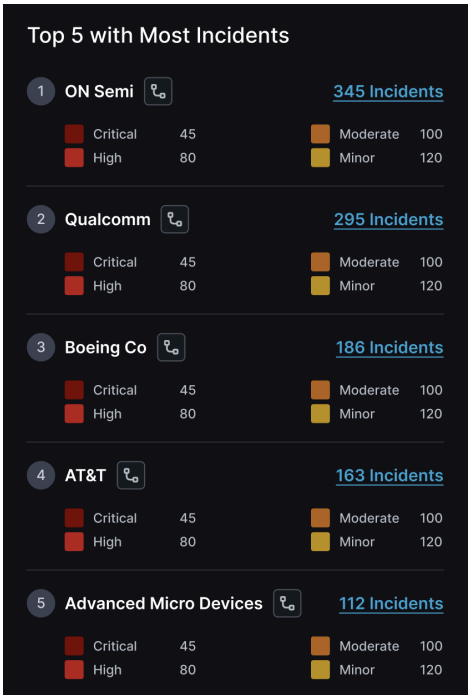
**2.**




**3. Top 5 with Most Incidents:** This shows the five companies linked to your selected company that have experienced the most ESG incidents. For each company, it includes:

- Company name.
- Total incident count (click to see full Incident List).
- Incident severity level breakdown.

**3.**

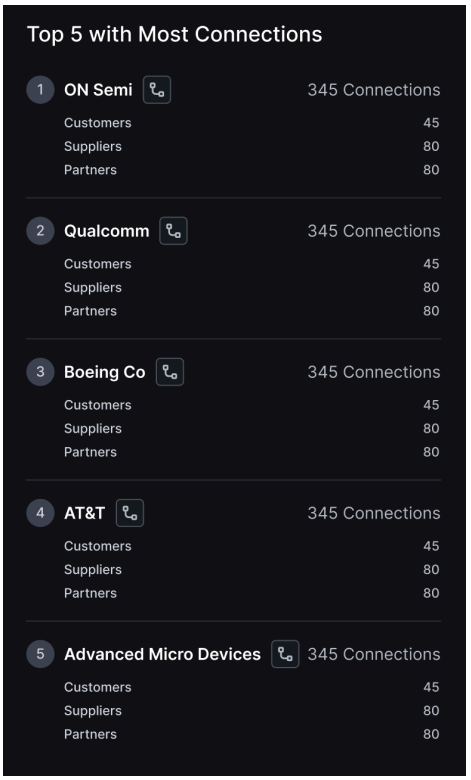


**3. Top 5 with Most Connections:** This shows the five companies linked to your selected company that have the most connections to others in your supply chain.

For each company, you'll see:

- Company name.
- Total number of connections.
- Breakdown of connections by relationship type.

**3.**

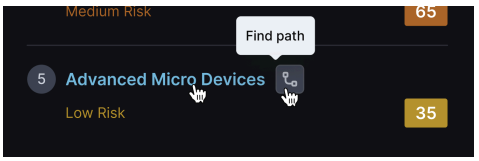



**5.** In all of these Top 5 lists, you'll see the **Find Path** symbol next to each company name.

Select it to trace the connection between that company and the one you originally right-clicked on. The path will be highlighted in white on the graph.

*For more details, read the section below on **Path Finding Mode**.*

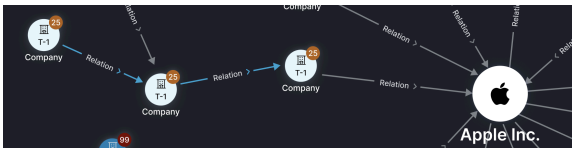
**5.**

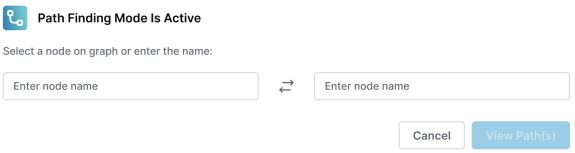
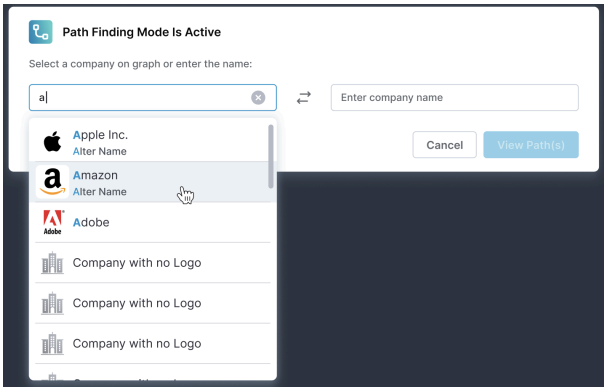
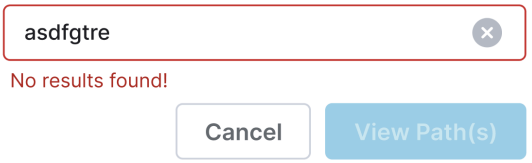
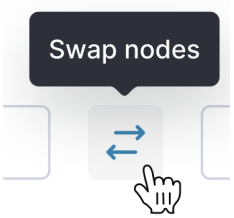
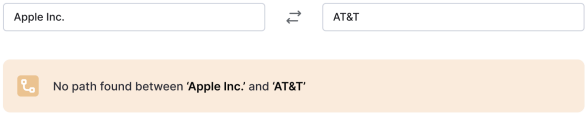



**6. Riskiest Path:** This highlights the most vulnerable supply route between your selected company and the one at the center of your graph. The path appears in white on the graph.

The companies along this path are considered the riskiest because they have the highest ESG risk scores.

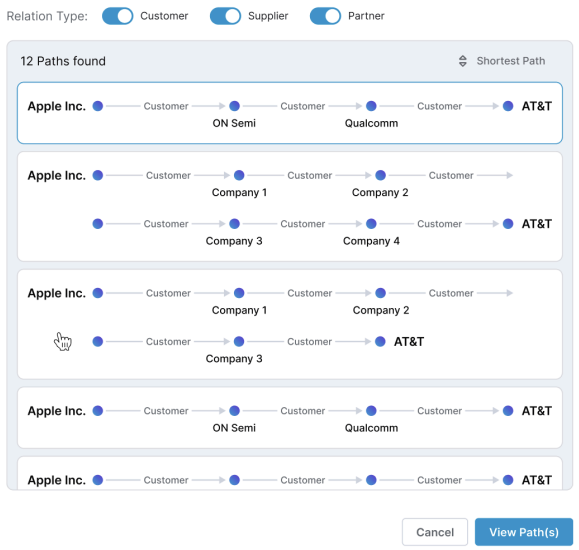
**6.**



| | | |
|---|---|---|
| **Find Path** | This option lets you see how any two companies in your supply chain are connected. If a path exists between them, it will be highlighted in white.<br><br>**1.** To get started, select the **Find Path** option when you right click on a company. This opens **Path Finding Mode**.<br><br>**2.** Pick the two companies you want to find a path between by clicking on them directly on the graph or typing their names into the fields provided and selecting them from the dropdown menu.<br><br>*(Nodes = Companies)*<br><br>**2a.** If you type an incorrect company name in the search field, you'll get an alert.<br><br>Click the **X** to remove your search and try again.<br><br>**2b.** Click the **Swap nodes** button to reverse your search. This swaps the companies you've selected and looks for paths in the opposite direction.<br><br>**2c.** If ESG Sentinel cannot find a path between your chosen companies, you'll get an alert. | **1.**<br>  <br><br>**2.**<br>  <br><br>**2a.**<br>  <br><br>**2b.**<br>  <br><br>**2c.**<br>  <br> |

**3.** If ESG Sentinel finds any paths between your chosen companies, they'll be listed in the dropdown below the search fields.

**3.**

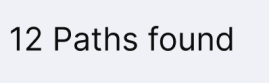



**3a.** You can filter the results by **Relationship Type** using the toggles at the top of the screen. Untoggled relation types will be excluded.

**3a.**

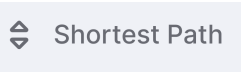
**3b.** The total number of paths found is shown in the top-left of the screen.

**3b.**




**3c.** Your results will be ordered by either the shortest or longest path first. Click the button in the top-right of the screen to switch between them.

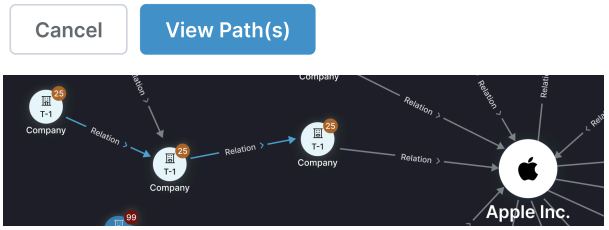
**3c.**

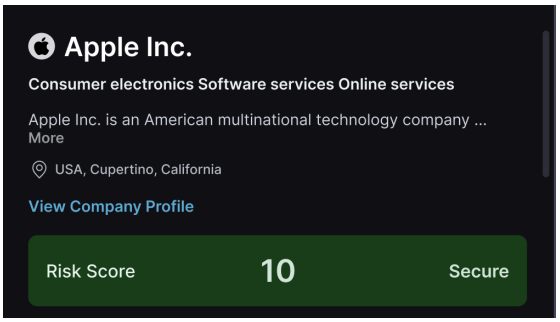
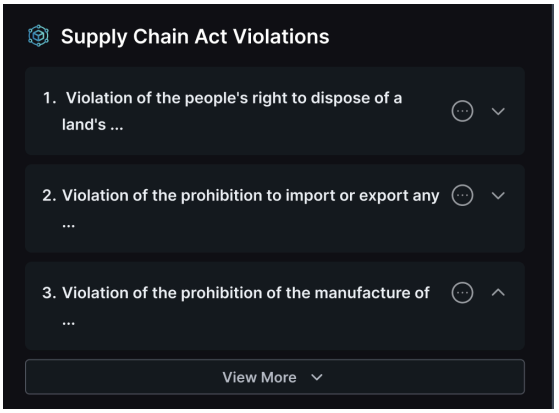
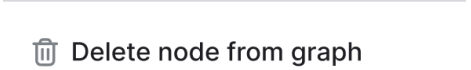



**3d.** When you're ready to view a path, click on it in the dropdown and select **View Result(s)**. Your path will be highlighted in white on the graph.

If you want to exit the screen without searching, click **Cancel.**

**3d.**



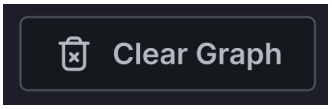
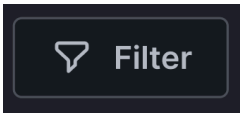
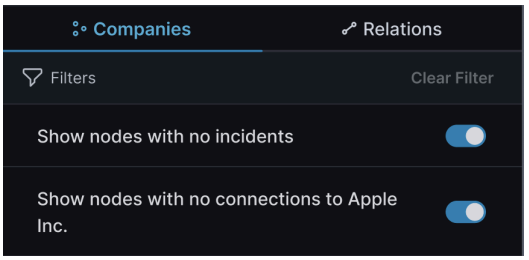
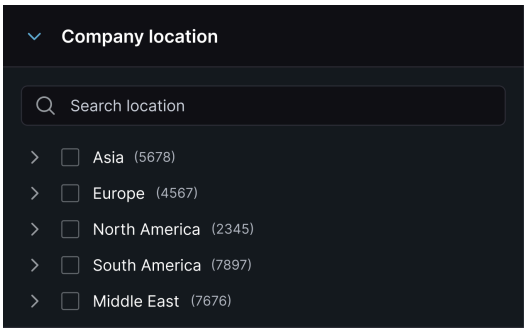
| | | |
|---|---|---|
| **Company Details** | To learn more about a company on your graph, right-click on it and select **Company Details**. This will open an information page with three key sections:<br><br>**1. Overview:** This tells you the company's name, industry, bio, location, and color-coded ESG risk score.<br><br>Click **View Company Profile** to see the company's full page on ESG Sentinel.<br><br>**2. Supply Chain Act Violations:** This section lists all breaches of industry regulations within the company's supply chain, with each violation linking to related news reports and risk severity levels (in brackets).<br><br>*Note: Click on the three horizontal dots to see more information about each violation, or click **View More** to see the full list of violations.*<br><br>**3. Recent Incidents:** This section displays a news feed of recent incidents affecting the company. Each incident includes a headline, date, and a color-coded ESG risk score (in brackets).<br><br>*Note: Click **View All** to open your Incident List.* | **1.**<br>  <br><br>**2.**<br>  <br><br>**3.**<br> <br> |
| **Delete Node from Graph** | To remove a company from the graph, right-click on it and select **Delete Node from Graph**. The company will be removed immediately.<br><br>*(Nodes = Companies)* |  <br> |

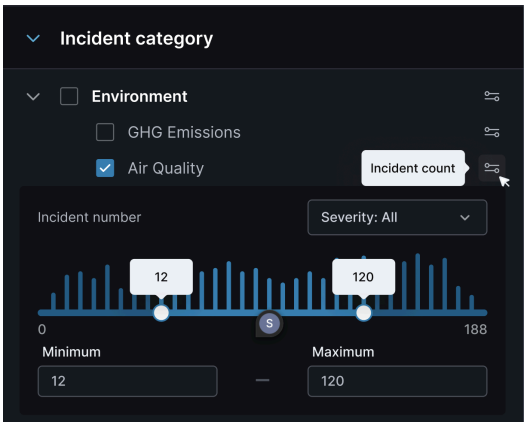
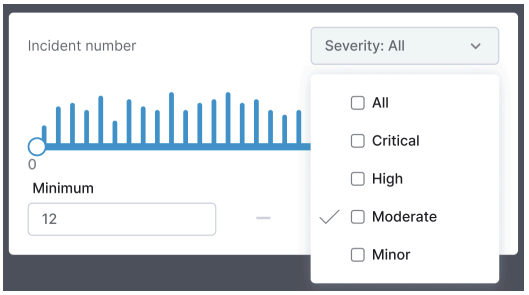
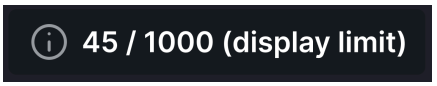
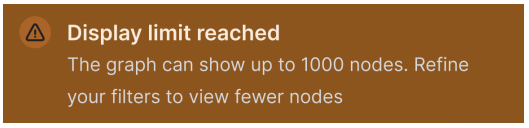
## 9.4 Customizing the Graph

Your supply chain graph has two main toolbars:

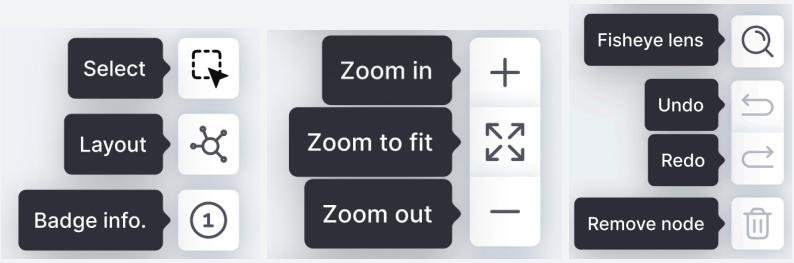
**1. General Toolbar:** Lets you clear the graph, and apply general filters and time ranges to your graph data.

**2. Graph Display Toolbar**: Lets you interact with the graph's display.

| General Toolbar | | |
|---|---|---|
| **Clear Graph** | The clue's in the name with this option. Click the **Clear Graph** button to remove all information from your graph, including all companies and pathways. |  |
| **Filter** | **1.** Click the **Filter** button to see your filter options for the graph.<br><br>**2.** These options are divided into two categories: **Companies** (which apply to the companies on your graph) and **Relations** (which apply to the relationships between companies on the graph).<br><br>At the top of the **Companies** filter page, there are two toggle options:<br><br>- **Show nodes with no incidents**.<br>- **Show nodes with no connections to your main company**.<br><br>If you untoggle these options, companies without ESG incidents or connections to your main company will be hidden from the graph.<br><br>**3.** Your other filter options (for both **Companies** and **Relations**) are displayed in dropdown menus below; most of which offer checkbox options.<br><br>Check the boxes next to the filters you want to apply.<br><br>For some options, like the **Company list** and **Company location** filters, you can also use the search bar to find specific options. | **1.**<br>  <br>**2.**<br>  <br>**3.**<br>  |

| | | |
|---|---|---|
| | **4.** The **Incident category** filter features both checkboxes and a sliding scale.<br><br>Drag the minimum and maximum measures on the scale to set the range for the number of incidents per company you want to see on the graph. Alternatively, you can enter your min and max figures in the fields provided.<br><br>**4a.** Click the right-hand dropdown menu to filter the incidents in your chosen range by severity too.<br><br>**5. Graph Exploration** can display up to 1,000 results at a time, as shown by the counter in the bottom-right corner.<br><br>**5a.** If your selected filters throw up more than 1,000 results, you'll receive an alert and not all of them will be displayed on the graph. | **4.**<br>  <br><br>**4a.**<br>  <br><br>**5.**<br>  <br><br>**5a.**<br>  <br> |
| **Time Range Filter** | To select a specific time range for the information shown on your graph, choose start and end date from the dropdown menu in the top-right hand corner. | <br> |

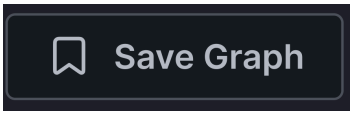
## Graph Display Toolbar



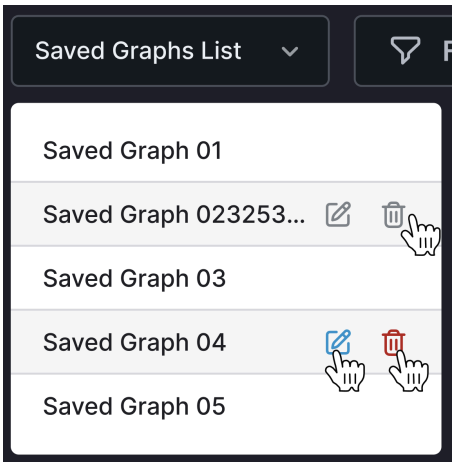

| | |
|---|---|
| **Select** | This tool lets you select multiple items on the graph at once.<br><br>You can use it to select:<br><br>- **All nodes**: Select all companies on the graph.<br>- **Leaf nodes**: Select only companies at the end of each branch.<br>- **Isolates**: Select companies with no connections to others.<br>- **Lasso**: Hold **Shift** and drag to draw a box around a specific area to select one or more companies at once. |
| **Layout** | This tool lets you change how your graph is displayed.<br><br>It features three main viewing modes:<br><br>- **Force-directed layout:** Companies repel each other while their connections pull them together.<br><br>- **Hierarchical layout:** Organizes companies in a structured format, making it easier to see parent-child relationships and the flow of connections.<br><br>- **Radial layout:** Companies branch out in a circular pattern, highlighting direct and indirect relationships. |
| **Badge info** | This option changes what information your badges (the small circles pinned to companies) display on the graph. You can choose between:<br><br>- The number of incidents the company has experienced (color-coded by severity).<br>- The company's color-coded ESG risk score.<br>- The number of connections the company has within your supply chain. |
| **Sizing/Zoom** | - Click **+** to enlarge the whole graph and **–** to shrink it.<br>- Use the **magnifying glass** to zoom in on a specific area. |
| **Undo + Redo** | Undo or redo your last action on the graph. |
| **Remove Node** | Use this option to remove companies from the graph.<br><br>- Click on a single company and select **Delete** to remove it.<br>- To delete multiple companies at once, hold **Shift** to activate the lasso tool, drag over the companies you want to remove, and then select **Delete**. |

## 9.5 Saving your Graph

Once you've created a graph, the **Save Graph** button will appear at the top of the screen. Click it to save the current version of your graph.



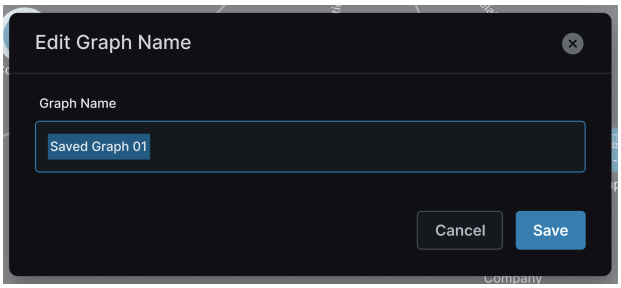

You can see your saved graph, as well as any previous saved graphs, in the **Saved Graphs List** dropdown menu at the top of the page.



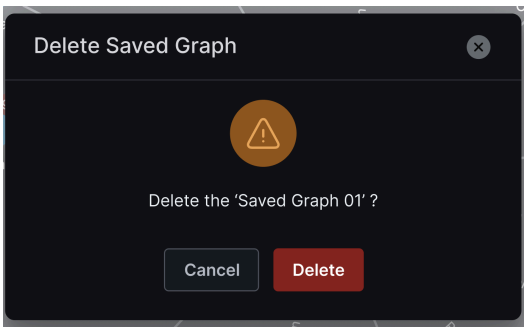

Click on a graph to open it up in Graph Exploration.

Click the **edit button** to change the name of your Graph (graphs are automatically saved as "Saved Graph 01", "Saved Graph 02" and so on, until you manually rename them).

Type your new graph name into the field provided, and click **Save** to rename it, or **Cancel** to exit without saving.




Click on the **delete button** to delete a saved graph. You'll be asked to confirm your decision. Click **Delete** to continue or **Cancel** to exit without deleting.



# 10 ESG-GPT

ESG Sentinel is powered by a proprietary artificial intelligence (AI) model that continuously gathers and analyzes data from millions of news articles, NGO reports, and social media sources, providing you with real-time, tailored ESG risk insights.

With the **ESG-GPT** feature, you can interact directly with this AI model.

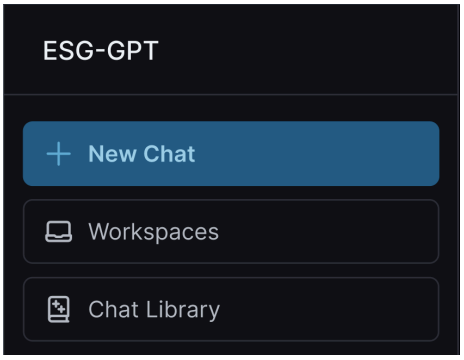
ESG-GPT is a language model specifically trained to answer your questions about ESG risk data. ESG-GPT can provide insights on ESG performance, risks, incidents, breaches, stock prices, and more; whether you're looking at specific local cases or sweeping global trends.

It pulls data from across the ESG Sentinel and presents its responses in formats you're already familiar with on the platform, including detailed charts and source cards that link to specific news reports and incident briefs.

If you're already familiar with GPT models, ESG-GPT will likely feel intuitive. If not, no worries; this section will help you get started.

## 10.1 Overview

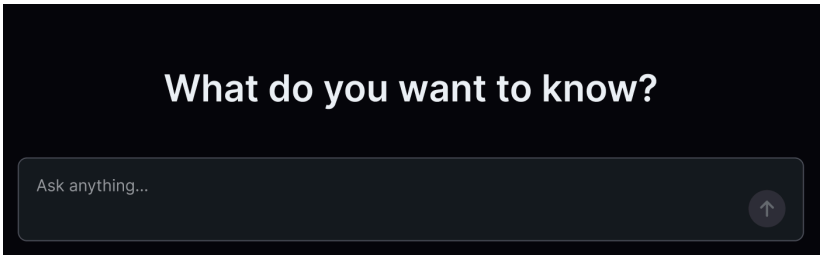
When you open **ESG-GPT**, you'll see a menu of actions on the left-hand side. From here, you can:




- Start a new chat
- Manage your Workspaces
- Open your Chat Library

## 10.2 Starting a New Chat

On the main screen of **ESG-GPT**, you'll see a prompt window where you can type your questions for the model.




If it's your first time using ESG-GPT, you won't have any saved chats yet, so simply type your question to start your first one.

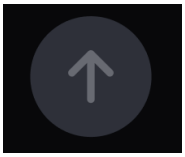
> If you've used ESG-GPT before and want to ask something new, click the **New Chat** button in the left-hand menu.

Type your question into the prompt field. You can ask ESG-GPT anything you're curious about when it comes to ESG performance and risk intelligence.

Here are some **best practices** for prompting the ESG-GPT model:

| | | |
|---|---|---|
| **Write clear instructions** | Be specific about what you want from ESG-GPT's response – whether that's the type of data, the length of response, or even the tone of voice. | *"Provide a summary of the main ESG risks in the automotive industry. Include a bar chart to show this."* |
| **Include plenty of details** | The more detailed your question, the better the response. Provide context to your questions to make sure ESG-GPT understands what you need and why. | *"Analyze ESG incidents in the retail sector over the past five years, focusing on labor violations. I need this for a risk trends report."* |
| **Provide references** | If you want the response to be based on specific reports, sources, or data, mention them in your prompt. | *"Tell me about ESG risks in the mining industry based on the latest NGO reports."* |
| **Split up your question** | If your question is complex or requires a specific format, break it down into steps or add constraints. | *"List the top 5 ESG risks in the energy sector, then explain how each affects financial performance. Don't include any data before 2020."* |
| **Ask the model to adopt a persona** | ESG-GPT can tailor its response based on the role you assign it. | *"Act as an ESG consultant and provide recommendations for improving a company's ESG risk score."* |

You can't click the **Enter** button (upwards arrow) until you've typed something into the prompt field. Once you start typing, the button will turn blue. This means that ESG-GPT is ready to receive your question. Click it to send your query.

| | |
|---|---|
| **Text field is empty** |  |
| **Text entered: Ready to send** | |

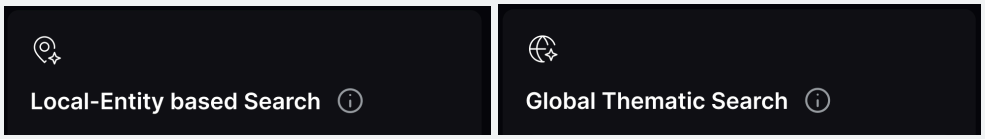
After you send your first query, the prompt field will change to say **Explore further**. You can enter follow-up questions here to narrow down on specific details or continue the conversation with ESG-GPT.

## 10.2.1 Local and Global Searches

ESG-GPT offers two search modes to help ensure it answers your question in the right context, with the appropriate data:

- **Local:** ESG-GPT provides detailed information about a specific company or event.
- **Global:** ESG-GPT offers a wider view of ESG trends from across the globe.

If you want to use one of these search modes, click on either **Local (Entity-Based Search)** or **Global (Thematic Search)** before sending your prompt and ESG-GPT will adjust its response accordingly.



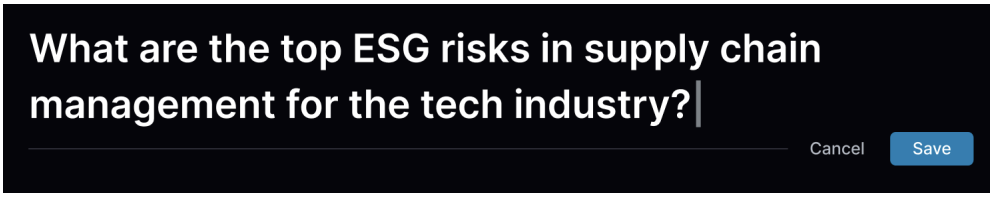

| Search Type | Use Case | Examples |
|---|---|---|
| Local-Entity Based Search | Use this search type to get detailed information about a certain ESG incident, like the companies involved or the actions taken. | How will cutting over 100 jobs in Houston affect Shell Energy Solutions' reputation, given the criticism over cost-cutting and employee welfare?<br><br>What penalties could Tesla face from the NHTSA investigation into four fatal accidents involving 2.4 million self-driving vehicles, and how might this impact customers, regulators, and Tesla's reputation? |
| **Global Thematic Search** | This is a good option for getting a broader overview of risk trends or spotting trends and patterns. | What are the key environmental trends in Europe's energy sector over the last five months, focusing on renewable energy and its impact on carbon emissions?<br><br>What are the key social impact trends related to immigrants in Germany, particularly focusing on how tech companies' actions influence their employment opportunities, integration, and access to social services? |

### 10.2.2 Editing Queries

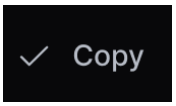
Instead of typing a new question for ESG-GPT, you might find it easier to edit your original query. This is especially useful if you just need to adjust the wording or add some extra details without generating a completely new response.

To do this, hover over your question title in the chat until you see the **Copy** and **Edit** buttons.

Click **Edit** to modify your question. Once you're done making changes, click **Save** to update it. If you decide not to make any changes, just hit **Cancel** to exit without saving.




Click **Copy** to copy your question text to your clipboard, so you can paste it elsewhere. A check mark will appear to confirm the action.

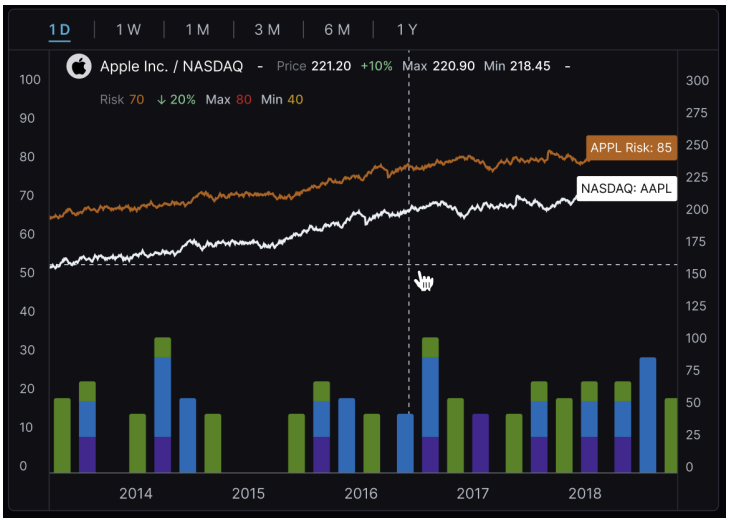



The edit counter below your question shows how many times you've edited it. Click the arrows to toggle between different versions.

## 10.3 Reading ESG-GPT's Output

Depending on the detail and complexity of your question, ESG-GPT's response may include a mix of text, charts, data, and source material.

*Note: Sometimes, LLMs can generate inaccurate or misleading information, so it's always good to verify key details.*

| | | |
|---|---|---|
| **Text** | ESG-GPT presents information clearly with headings, paragraphs, bullet points, and more. If the output feels too complex, you can ask it to simplify or restructure its response. | **Governance Risks**<br><br>**Cybersecurity:** As supply chains increasingly rely on digital technologies, they become more vulnerable to cyberattacks, which can disrupt operations and compromise sensitive data.<br><br>**Regulatory Compliance:** Staying aware of and complying with evolving regulatory frameworks, especially across multiple jurisdictions, is a major challenge for tech companies.<br><br>**Supply Chain Transparency:** There is increasing pressure for transparency and accountability in sourcing and operations, which requires robust ethical standards and compliance measures. |
| **Charts** | ESG-GPT may use charts to visualize data or help illustrate its answer. These charts follow ESG Sentinel's house style, so once you're familiar with the platform, they should be easy to understand. Click on a chart to open the Full Chart View. |  |
| **Sources** | If ESG-GPT references a specific report or incident, it'll provide a Source. You can see this by clicking on the blue link at the end of the sentence. | carbon emissions [1]. |

### 10.3.1 Sources

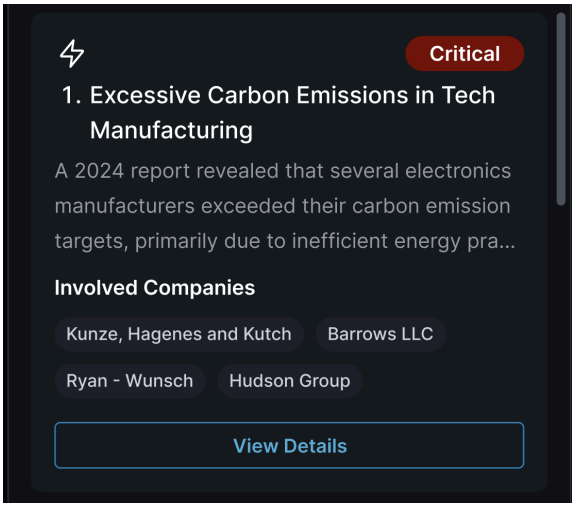
When ESG-GPT includes specific references, you'll find a link at the end of the sentence. Click the blue number to view the related source/s.

risks to tech companies and their supply chains [4].

The related sources will appear on the right side of the response field. Above the sources is a counter showing how many sources are linked to each statement.

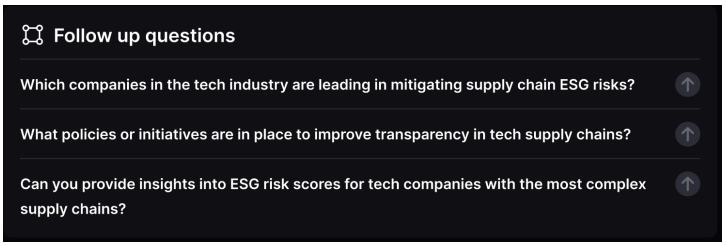
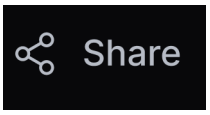
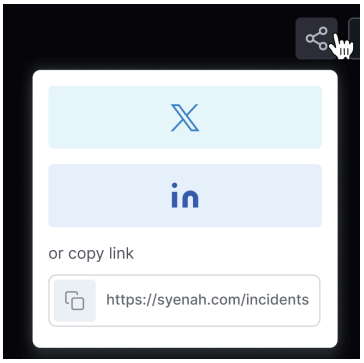
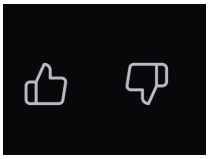
4 Sources

ESG-GPT provides sources based on **incidents** and **reports**.

| | | |
|---|---|---|
| **Incident Sources** | Incident sources (marked with a lightning symbol) give you details about specific incidents ESG-GPT refers to in its responses, including:<br><br>- The ESG severity rating for the incident (color-coded).<br>- The incident headline.<br>- A preview of the incident details.<br>- The companies involved (click their names to view their company pages).<br><br>Click **View Details** to open the Incident Details page. |  |
| **Report Sources** | Reports (indicated by the page symbol) provide more details about reports ESG-GPT refers to in its responses. These source cards include:<br><br>- The report headline.<br>- A preview of the report details.<br>- The number of incidents linked to the report (left).<br>- An incident view dropdown.<br><br>Click **View the Incidents** to see the incidents linked to the report, displayed as cards in a dropdown below. They'll appear just like the incident sources. | |

## 10.3.2 More Actions

There are a few extra actions you can take during your conversation with ESG-GPT, including:

| | | |
|---|---|---|
| **Ask follow-up questions** | If you want ESG-GPT to elaborate on something or continue the conversation but aren't sure what to ask next, check out the suggested follow-up questions below the prompt field.<br><br>Click on a question to send it to the chat, and ESG-GPT will respond accordingly. |  |
| **Share chats** | Want to share one of your chats online? Click the **Share** button at the top of your chat (next to the headline) or at the bottom of the page under ESG-GPT's latest response.<br><br>You can share directly to X or LinkedIn, or copy the web link to your clipboard. |  <br>  |
| **Copy Chat Text** | To copy ESG-GPT's latest response to your clipboard, just click the **Copy** button beneath its most recent answer. | |
| **Provide feedback** | Your feedback helps ESG-GPT to improve its future responses. If you want to share your thoughts, hit the thumbs up or thumbs down symbol under ESG-GPT's latest reply. Thumbs up if you're happy with it, thumbs down if not. |  |

## 10.4 Managing your Chats

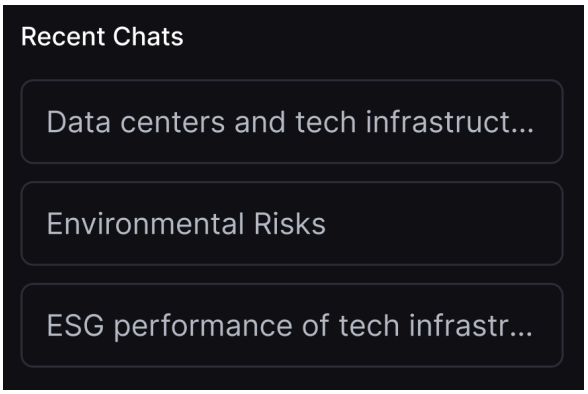
Once you've asked ESG-GPT a question, the chat is automatically saved, and the conversation will continue as long as you're in the same session. You can revisit any saved chat, as well as organize, edit, or delete it whenever you need.

You'll find your saved chats in two sections:

- Recent Chats
- Chat Library

### 10.4.1 Recent Chats

All your recent chats with ESG-GPT are listed on the left-hand menu. You can click on any chat to continue the conversation.

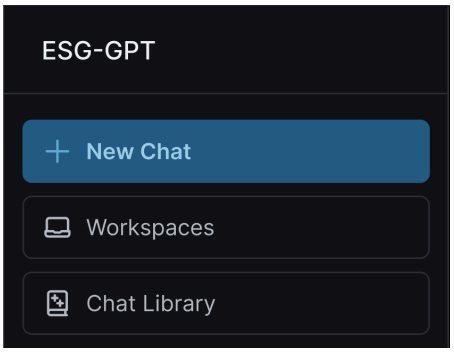



To see a full list of your previous conversations with ESG-GPT, head to your Chat Library.

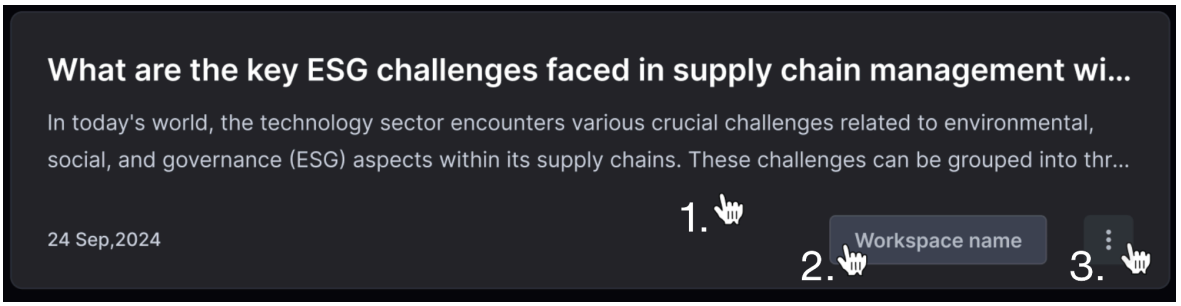
### 10.4.2 Chat Library

Your **Chat Library** is where all your past chats are saved. You can access them to view, edit, or add them to a **Workspace**.

To open your Chat Library, click the **Chat Library** tab on the left side of the main ESG-GPT page.



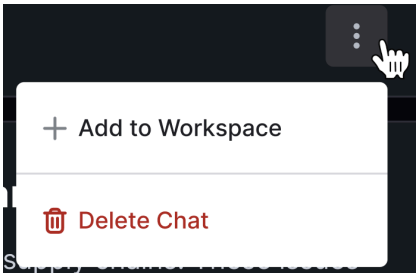
In your Chat Library, each chat shows:




1. Your first question and a preview of ESG-GPT's response, as well as the date the chat was started (bottom right).

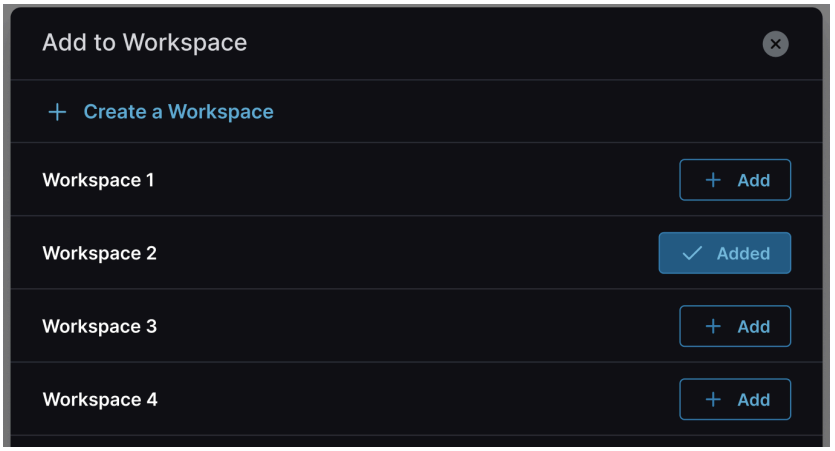
2. A Workspace label (if you've added the chat to a Workspace). Click on this label to open your Workspaces page.

3. An options menu:




   a. Click **Add to Workspace** to add your chat to your Workspaces.

      This opens a menu where you can choose which Workspace to add the chat to.




      - Click **Add** on the Workspace you want.
      - Click **Create a Workspace** to create a new Workspace.

b. Click **Delete** to remove the chat from your Chat Library.

From your Chat Library, you can also:

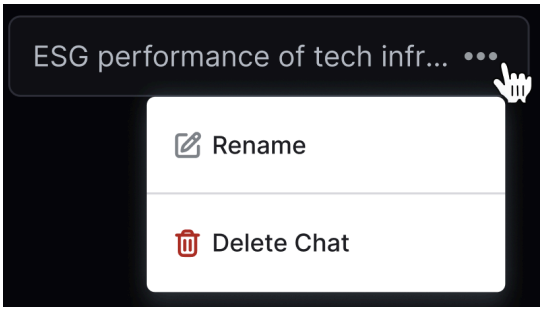
- Click on a chat tab to open the full conversation.
- Hit the + button in the top-right of the screen to start a new chat with ESG-GPT.
  - This will open a pop-up query box where you can enter your prompt.

Click on the send arrow button to ask it to ESG-GPT. This will create a new chat page, and your current chat page will be added to your Recent Chats menu.

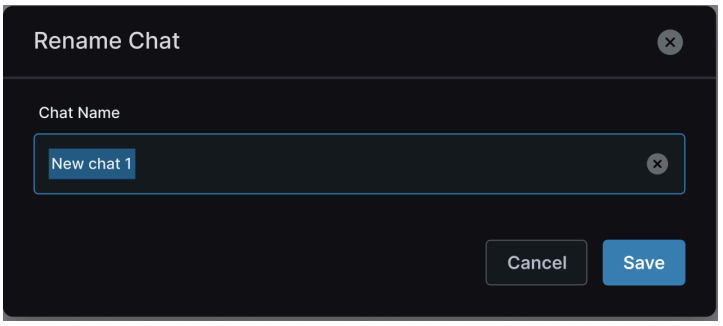
### 10.4.3 Renaming Chats

ESG-GPT automatically names your chats based on the topic it detects, but you can change that.

Hover over a chat to reveal a menu of options (three dots), click to open, and choose **Rename**.

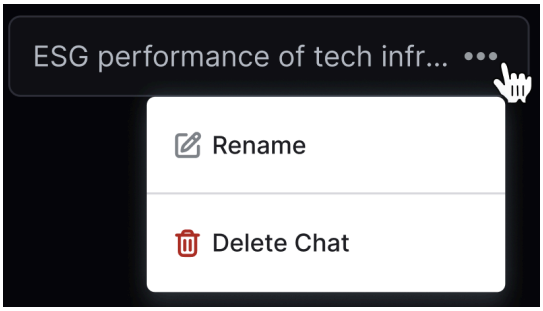



Type in a new name and click **Save** to update it. To cancel, click **Cancel** or the **X** in the top-right corner of the box.



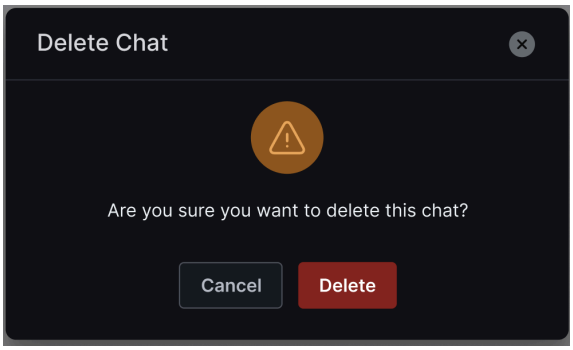
### 10.4.4 Deleting Chats

To delete a chat, hover over it, open the menu (three dots), and select **Delete Chat**.




You'll be asked to confirm your decision. Click **Delete** to delete your chat.

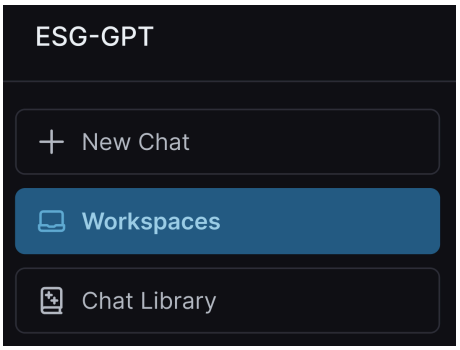
Click **Cancel** or the top-right **X** button to exit the screen without deleting.



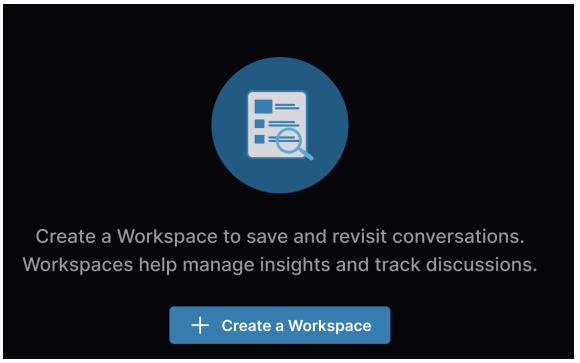
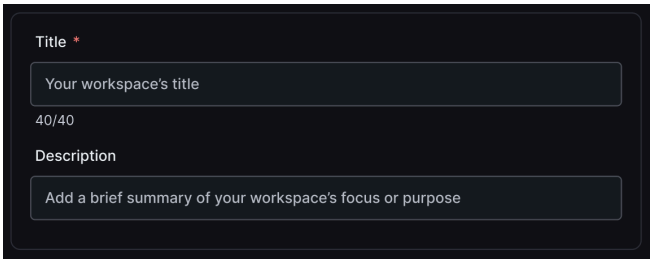
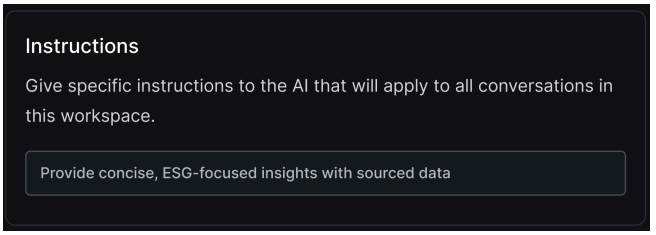

## 10.5 Workspaces

**Workspaces** give you a focused space to ask ESG-GPT questions about certain topics or goals. By providing instructions for ESG-GPT on how to treat your conversations and uploading sources for context, you can tailor each Workspace to get the exact insights you need from ESG-GPT; all stored in one place and neatly organized for easy access later.

You can open your **Workspaces** from the left-hand column of the ESG-GPT feature.

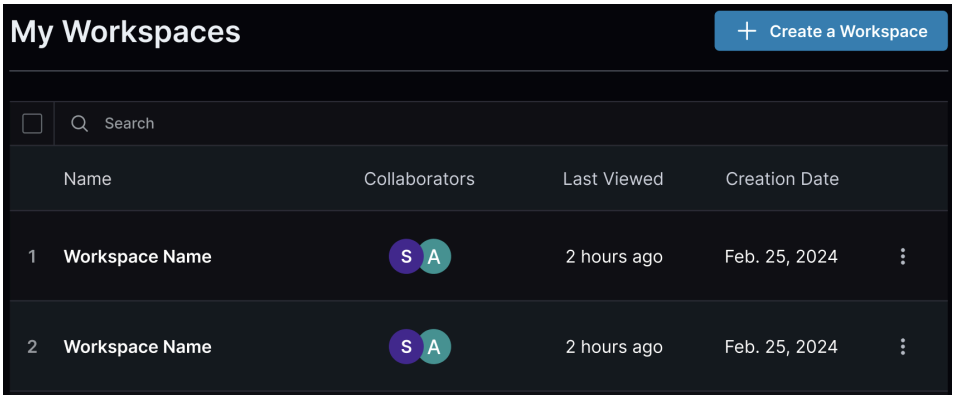


## 10.5.1 Creating a Workspace

| | |
|---|---|
| If it's your first time here, the Workspaces page will be empty.<br><br>Click **Create a Workspace** to get started. This opens the Workspace creation screen. |  |
| Give your Workspace a title and description. These could reflect the topic, conversation type, or problem you're working on with ESG-GPT.<br><br>*Note: Workspace titles have a 40-character limit. If your title is too long, you'll need to shorten it before saving.* |  |
| Tell ESG-GPT how to handle your Workspace by providing clear instructions; just like a prompt. These guidelines will apply to all conversations in your Workspace, ensuring you get relevant insights every time. |  |
| Click **Continue** to save your Workspace details.<br><br>*Note: You can't proceed until you've given your Workspace a title.* | |

### 8.5.1 Managing your Workspaces

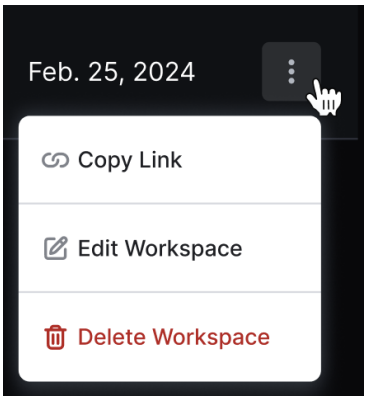
Once you've created Workspaces, you'll see a table listing them every time you open the feature.



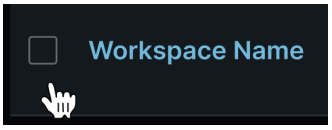

From left to right, each row in this table shows your Workspace title, team collaborators, the last time it was viewed, and when it was created.

Click on the three dots at the end of the row to:

- **Copy a shareable link** to your Workspace.
- **Edit** your Workspace (this takes you back to the creation screen).
- **Delete** your Workspace.




To **delete multiple Workspaces**, hover over their names and click on the checkboxes that appear on the left-hand side.



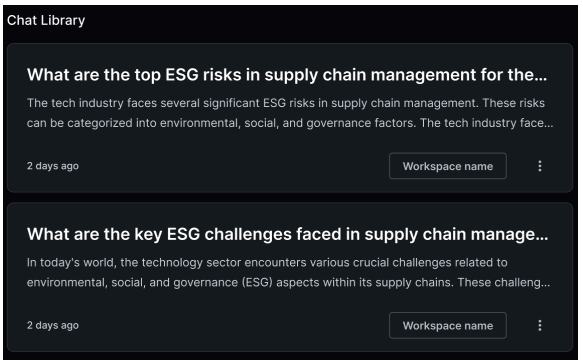
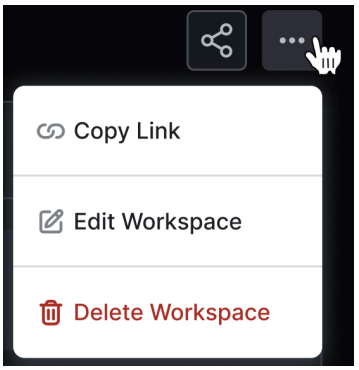

The counter at the top will tell you how many Workspaces you've selected. Once you've selected the Workspaces you want to delete, click the **Delete** button.

Click the **Create a Workspace** button (top right) to create a new Workspace.

## 10.5.2 Workspace Page

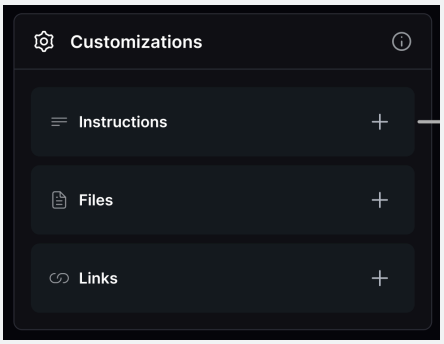
Once you've created a Workspace, you can start asking ESG-GPT questions and managing your conversations from your Workspace page.

Each Workspace includes a prompt box for you to ask ESG-GPT questions, a Chat Library just for your Workspace, and a customization box for you to upload specific instructions, links, and files to help guide ESG-GPT's responses.

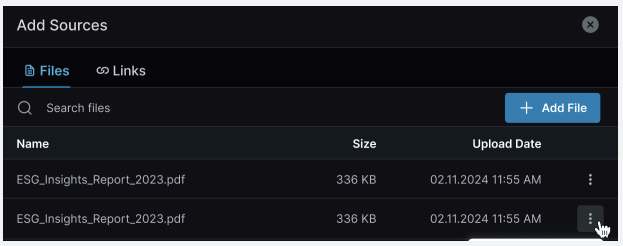
| | | |
|---|---|---|
| **Start a conversation** | Enter your question for ESG-GPT in the prompt field.<br><br>This works just like a regular chat, but with your Workspace instructions applied for more tailored responses. | |
| **Browse the Chat Library** | Once you've started conversations in your Workspace, they'll appear in a dedicated Chat Library below. You can revisit and continue past discussions anytime.<br><br>*Learn how to manage your Chat Library.* |  |
| **Share Workspace** | Click on the **Share** button to share your Workspace online, or copy a shareable link to your clipboard. | |
| **Edit Workspace** | Click on the three-dot menu to:<br><br>**- Copy a shareable link** to your Workspace to your clipboard.<br>**- Edit** your Workspace (this takes you back to the creation screen).<br>**- Delete** your Workspace. |  |

## 10.5.3 Customizing your Workspace

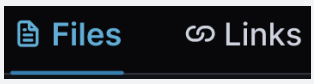
From the **Customizations** panel (right), you can fine-tune your Workspace by adding extra instructions, files, or links. These help ESG-GPT tailor its responses to your specific focus.

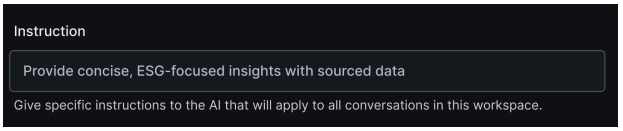
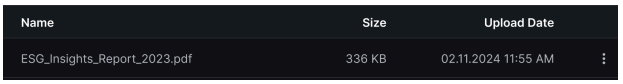
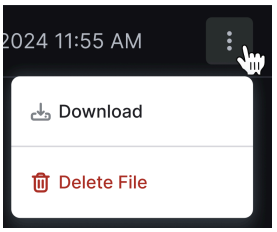


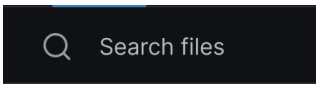
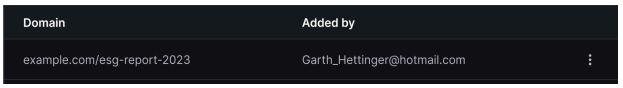
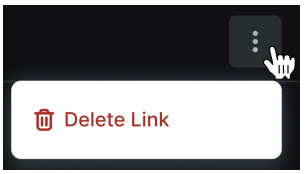
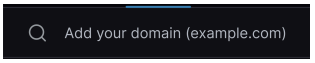

Both the **Files** and **Links** options lead you to a source list. This is where you can upload files and links to provide ESG-GPT with extra context for your Workspace conversations.




You can cycle between your list of files or links using the tabs at the top of your source list.




| | | |
|---|---|---|
| **Add Instructions** | Select **Instructions** from the Customizations panel.<br><br>This leads you back to the Workspace creation screen, where you can enter more instructions for ESG-GPT. |  |
| **Add Files** | Select **Files** from the Customizations panel.<br><br>**1.** Click **Add File** (top-right) to add a new file to your source list.<br><br>**2.** Your uploaded files will appear in the list below.<br><br>**3.** Click on the three dot menu at the end of the row to **download your file** or delete it from your source list. | **1.**<br> <br>**2.**<br>  <br>**3.**<br>  |

| | | |
|---|---|---|
| | **4.** Use the search bar to find a specific file in your list by typing its name into the search field. | **4.**<br>  <br> |
| **Add Links** | Select **Links** from the Customizations panel.<br><br>**1.** Click **Add Link** (top-right) to add a new URL to your source list.<br><br>**2.** Your links will appear in the list below.<br><br>**3.** Click on the three dot menu at the end of the row and select **Delete Link** to delete it from your source list.<br><br>**4.** Use the search bar to add your domain to the list by typing its name in. | **1.**<br> <br><br>**2.**<br>  <br><br>**3.**<br>  <br><br>**4.**<br>  <br> |