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# SFDR: From Data Collection to Report Submission





# Agenda



- ① **Why we need to strengthen SFDR implementation?**
- ② **Challenges observed**
- ③ **Digital reporting as an enabler of better SFDR outcomes**
- ④ **Case study**
- ⑤ **Strategic Use of SFDR Data**
- ⑥ **Informing product design and innovation**
- ⑦ **Conclusions and Way Forward**



# Why we need to strengthen SFDR implementation?



It represents a **shift in mindset**, from purely financial performance to broader accountability on environmental and social outcomes.



Create a common language across the EU



Enhance accountability on non-financial performance



Enable comparability between financial products and actors on sustainability matters

The broad and sometimes vague definition of sustainability objectives creates **interpretive uncertainty**.

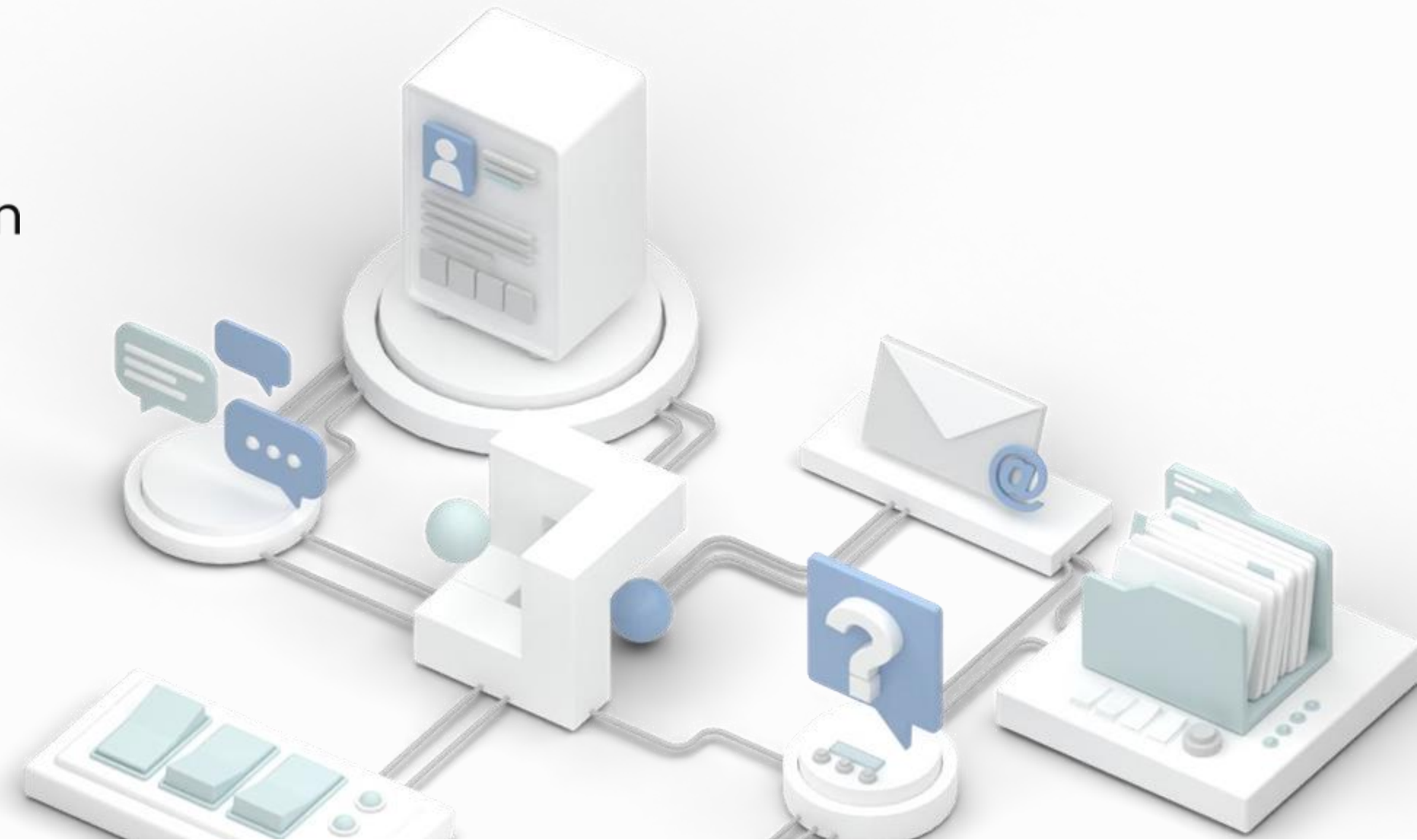


# Translating SFDR into practice: Challenges observed



From the Investor's point of view

- Data availability and portfolio company engagement
- Complexity in calculating PAI indicators
- Limited interoperability with CSRD and ESRS
- Compliance burden for smaller financial players
- Risk of greenwashing due to inconsistent interpretation



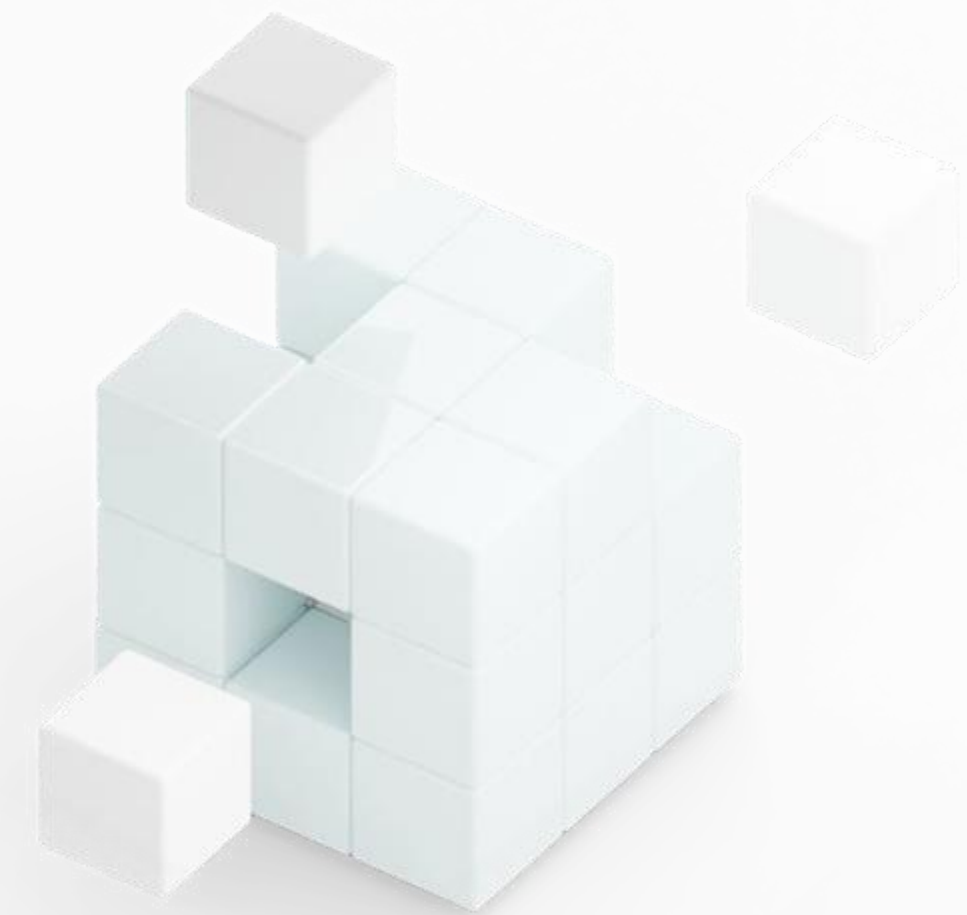


# Translating SFDR into practice: Challenges observed



From the Investee's point of view

- Multiple and uncoordinated sustainability data requests
- Lack of internal resources and ESG readiness
- Misalignment between investor expectations and corporate materiality
- Limited support or incentives to disclose

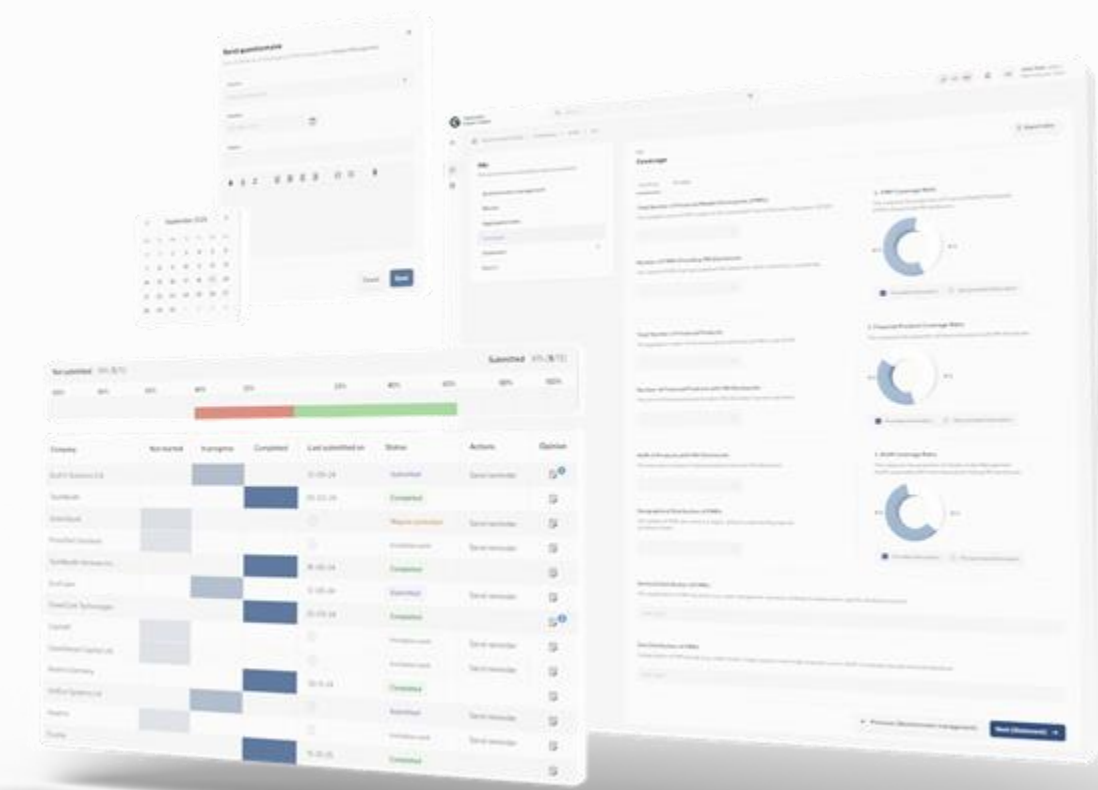




# Digital reporting as an enabler of better SFDR outcomes



- Standardising data collection from portfolio companies
- Automating PAI calculations and article classification
- Real-time audit trails and version control
- Linking SFDR to CSRD, ESRS and other frameworks
- Supporting comparability, supervision and oversight





# Case study: what changes when digital infrastructure is in place

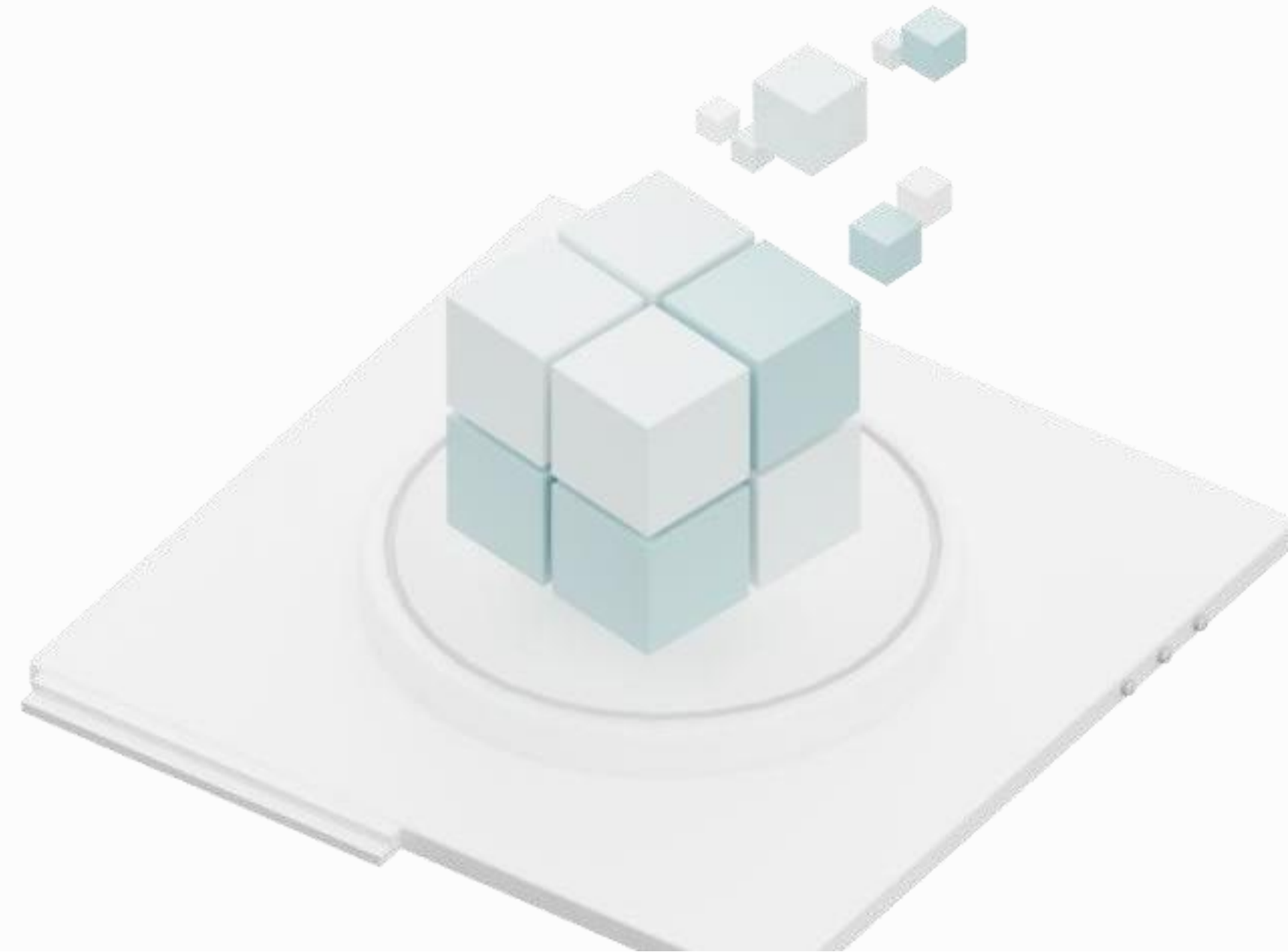




# Beyond Compliance: Strategic Use of SFDR Data



- Aligning Impact goals with regulatory data
- Enhancing transparency with LPs
- Supporting internal risk and ESG Teams





# Beyond Compliance: Strategic Use of SFDR Data



- Informing product design and innovation
- Creating internal culture and accountability around sustainability

Identify gaps and strengths + New funds and strategies





# Beyond Compliance: Strategic Use of SFDR Data



- Creating internal culture and accountability around sustainability

Useful for setting internal targets and **linking ESG performance to incentives**, investment committee discussions, or risk management frameworks.





# Conclusions and way forward



- Key Success Factors
- Policy and Market Recommendations
- Vision for a Fully Digital Regulatory Ecosystem





# Thank you

