

# SPTF Social Investor Working Group



*Monthly investor call*  
*April 14, 2022*

# Agenda

- 16:30 – 16:45** CERISE + SPTF Annual Meeting Discussion
- 16:45 – 17:15** Update on SFDR and ALINUS – SDG Reporting
- 17:15 – 17:25** Update Ukraine – investor coordination needs and proposals

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# Update on SFDR

- Work of the SIWG subgroup on SFDR
  - Monthly meetings since one year
  - Bi-weekly meetings in March 2022
- In-depth discussions on all the indicators, definition, raw data necessary, collection at investee level for year 1, then try at portfolio/end beneficiary level, key optional indicators, etc.
- Building an Excel file for data collection + key messages for investees
- Pilot testing with small sample for Q1 2022 data
- Second round, based on concrete experience for Q2 2022 data
- Integration in ALINUS/ ESG tool on SPI online update

=> All comments/ legal review on final docs are most welcome

=> Let us know if you want to participate in the pilot phase



## OUTCOMES MANAGEMENT FOR FINANCIAL SERVICE PROVIDERS

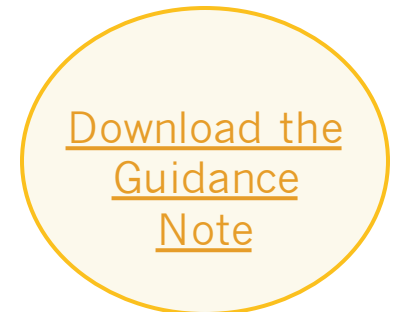
A proposed standard framework aligned with the Sustainable Development Goals

Prepared by CERISE in collaboration with SPTF Outcomes Working Group and e-MFP Investors AG

# SDG reporting

## A guidance note

- 1 BACKGROUND**
- 2 RECENT TRENDS INFLUENCING OUTCOMES MANAGEMENT**
- 3 CHALLENGES AND FIRST STEPS FOR VALUABLE OUTCOMES DATA, ALIGNING EXPECTATIONS**
- 4 A PROPOSAL FOR OUTCOME INDICATORS BY SUSTAINABLE DEVELOPMENT GOALS AND TARGETS**
- 5 RECOMMENDATIONS: NEXT STEPS ON OUTCOMES MANAGEMENT AND SDG FOR FINANCIAL INCLUSION**



With the support of



# SDG reporting



## Next steps

- Field work on outcomes measurement, with different partners
  - **Incofin/** Save India, Crystal Georgia, Juhudi Kilimo Kenya, Pamecas Senegal
  - **NMI/** Satin India
  - **SIDI-FGCA-FMO /** KRK Kosovo, SEF South Africa
  - **60 Db** experience
  - **Opportunity Intern'I, BRAC Intern'I, ACEP, ECLOF, etc:** role of the networks in outcome measurement
  - **Invest in Vision, BIB, Kiva:** Testing reporting at portfolio level:
  - Etc
- From this rich, concrete experience, a serie of webinars/ on site workshops planned by Cerise from September to November 2022 (with SPTF, eMFP, LabODD).
  - Integration on SPI online update (early 2023?):
  - in OrgInfo: key outcomes indicators, aligned with the SDG
  - An "outcomes dashboard", presented with the key SDG

=> Let us know if you want to share your experience, participate in the field work

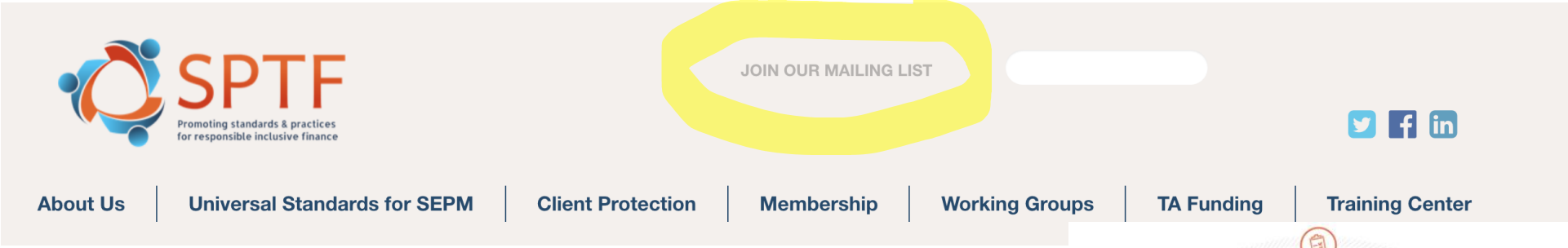
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# Concluding Announcements

## Stay connected!

Would you like to receive the notifications of upcoming events, tools and resources? Sign up for our newsletter at [www.sptf.info](http://www.sptf.info)!



## New Universal Standards released in March 2022!

Download the newest standards:

<https://sptf.info/universal-standards-for-spm/universal-standards>

