



# EVORA Analytics

---

Reports Tailored to Your Needs.







## Your Data, Your Way

Whilst many investment managers face the same challenges, data solutions often require tailoring to reflect the myriad investment strategies and objectives our clients are managing; EVORA Analytics provides immense flexibility to tailor reporting, metrics and insights precisely to client need.

EVORA Analytics is a best of breed solution that combines the automated data collection and validation capabilities of SIERA with the expertise of our Consulting, Managed Data Services, and Reporting & Analytics teams. The result is a reliable stream of high-quality data delivered through a fully configurable, interactive dashboard and reporting experience.

By simplifying the complex process of managing and reporting data, EVORA Analytics frees up valuable time and resources. It enables clients and consultants to respond to investor requests more proactively, uncover insights faster, and make smarter investment decisions that protect and enhance asset value.





# How it Works – Step by Step

1

## Discuss Your Needs

We start with a check-in meeting to understand your goals and match the dashboard/report type to your needs. It might be that one of our existing dashboard or report formats fulfils the need in which case the steps to onboarding can be further streamlined.

2

## Gather Requirements

Your account lead will collaborate with you and our Reporting & Analytics (R&A) team to ensure that your requirements are fully scoped for dashboards/reports to be prepared. This will also include establishing meetings for communication of project timescales to implementation, reviews and sign-off procedures where appropriate.

3

## Use Your Dashboard

After the initial implementation managed by us, EVORA Analytics is available for clients to self-serve. We take the burden of the dashboard and report creation away so that you are free to access the data and insights as and when you need them. You can also use EVORA Analytics as a repository for any other reports that would benefit from centralising plus it serves as a perfect delivery channel for EVORA consulting and advisory deliverables.

4

## Implementation & Onboarding

Our R&A team will develop and/or configure the dashboards/reports according to the requirements established in the process described above. Once the R&A team has created your dashboard/report, EVORA will make the item(s) available on the EVORA Analytics platform ready for users to access. Your account lead will coordinate with Client Success to provide onboarding and training as well as issue logins for all users that require access.



# Use Cases

EVORA Analytics has immense flexibility to support individual client needs but below are the typical use cases we see amongst our real asset investment management clients. These use cases are not exhaustive but are representative of the types of reporting and analysis needs in terms of scope and frequency. It also helps to match the approach to your needs to determine the format as well as extent of configuration required.

1

## Standard Data or Analytics Dashboard

- Best for accessing insights and data to understand and action portfolio performance improvement
- Pre-defined interactive dashboards ready to roll-out. Includes views on data quality and performance.
- Metrics derived from SIERA data model
- Available to clients that have either SIERA or the Managed Data Service

2

## Investor Reporting

- Report extracts to streamline fundportfolio reporting to investors
- Metrics derived from SIERA
- Available via 'EVORA Analytics' portal via secure login
- Uses template developed from breadth of EVORA experience as a starting point. Can be configured and scoped in collaboration with client.
- Costs depend on scope, extent of configuration and related services client receives

3

## Client-Configured Interactive Dashboards

- Interactive dashboards configured to client for asset & portfolio sustainability & risk management
- Uses data from SIERA but allows for client-specific data/metrics to be incorporated
- Configured and scoped in conjunction with the client
- Pricing dependent on scope, extent of configuration and related services client receives



# Common Questions and Answers

## **What types of reports can I see in EVORA Analytics?**

There is no restriction on the file types that can be stored. Dashboards using PDF and PowerBI can be previewed/presented in the user interface. In addition, reports stored as Word, PPT, Excel and PDF can be uploaded, stored and downloaded with ease.

## **Is SIERA required for EVORA Analytics to work?**

Whilst additional datasets requested by the client can often be incorporated, EVORA Analytics draws on data held in our platform, so clients require at least the Managed Data Service as a minimum for it to work or have a platform license.

## **How are reports and dashboards configured?**

Dashboards and reports are developed by EVORA's Reporting & Analytics team. Several templates have already been developed to cover the most common metrics and data use cases. EVORA works with clients to understand if existing dashboards/report templates meet the need, but configuration requirements need scoping which are managed by EVORA in collaboration with the client.

## **Is EVORA Analytics connected to my live data?**

Dashboards are interactive and function as static, point-in-time cuts of the database to make it easier to report to investors/ stakeholders. However, since it is connected to our platform, there is only one source of data and dashboards can be updated on an agreed cadence (typically monthly/ quarterly) to reflect changes in underlying records.

## **Can I export the data/reports in EVORA Analytics?**

Yes, reports and dashboard content can easily be downloaded from the user interface. Plus, interactive dashboards include flexible exporting capability so that users can, for example, choose if they want all underlying data or just what's been selected within a given metric/analysis.

## **How do I manage who sees which dashboard?**

EVORA has an admin function to control which client organisations users have access to within EVORA Analytics. We are also able to configure user permissions on a per report/dashboard basis ensuring users only see content that's relevant to their role.





## Related Services

### Managed Data Service

Let us shoulder the operational load of your data collection. We handle connections, keep an eye on data flow, and confirm everything is consistent.

Our collection experts and sustainability professionals collect, structure and qualify your data for you. We maintain everything in the background so that you can access all your sustainability data with minimum effort.



### SIERA Software

Meet our investment-grade sustainability data management platform that manages, measures and reports on sustainability performance, from portfolio to asset.

SIERA helps real estate investors understand their sustainability position, meet compliance and performance reporting requirements, and obtain insights to better manage sustainability initiatives and targets.







## Our Mission

To establish sustainability and carbon as foundational factors for investment decisions.

---

## Our Purpose

To accelerate the adoption of real asset sustainability and enhance the wellbeing of the planet and its people.

## Our Clients

**250+**  
CLIENTS

**45,000**  
ASSETS

**\$880 billion**  
AUM

“

**EVORA collaborated closely with our team to help bring together all our data sets into one place to enable us to streamline information collection and reporting. From this, we were able to identify any gaps before moving on to implement the automated data collection. We now receive monthly updates - integral for data accuracy - so we can track and compare more accurately and more efficiently. This streamlining process has allowed us to achieve full data completeness for our client TR Property Investment Trust on their GRESB submission in 2024 and we are very pleased with the processes and the outcome. We look forward to working with the team to build on this success.”**

**Tarniah Thompson**

**Head of Facilities Management & Sustainability  
Stiles Harold Williams LLP (SHW)**





## Contact us



[evoraglobal.com](https://evoraglobal.com)



[contactus@evoraglobal.com](mailto:contactus@evoraglobal.com)



[company/evora-global](https://company/evora-global)



[@evoraglobal](https://www.instagram.com/evoraglobal)



[@evoraglobal](https://www.twitter.com/evoraglobal)

The contents of this brochure are intended for general information purposes only and do not constitute advice. Reasonable professional care has been taken by EVORA Global in the development of this document. However, we provide no warranty or guarantee as to the accuracy, timeliness, performance, completeness or suitability of the information and materials found or offered in this brochure for any particular purpose. Any action you take based upon the information contained in this brochure is strictly at your own risk. EVORA Global cannot be held liable for any losses and/or damages in connection with the use of this brochure.

The next level  
of **Real Asset**  
**Sustainability**  
driven by  
Collaborative  
Expertise.

[evoraglobal.com](https://evoraglobal.com)