



White Stag Investing

*An Investment Consulting and Research Business in
Sustainability*

Presentation

White Stag Investing

Take Responsibility for your investments

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1. Overview



- White Stag Investing (WSI) is an Investment Research and Consulting Business in Responsible Finance. It follows a philosophy of investing where *sustainability is a source of value and stability in the long-term*.
- Our societies are now facing planetary and natural boundaries, fostering new kinds of uncertainty in our economies. By understanding these new dimensions, investors arms themselves with the necessary vision to navigate *a new investment environment*.
- Taking responsibility for these challenges is a source of value for investors. Our economies are heavily reliant on nature and its ecological services, yet very few recognise this fact in their investment decisions. This represents a set of *unmaterialised opportunities in markets*. This is the **Nature Trade**.

1.1 Overview (2)



- This trade can be accessed by recognising new *ESG premiums* in financial portfolios, investing in *game-changing sustainable solutions and/or integrating sustainability at the core of the strategical asset allocation (SAA)*, thereby recognising its capacity for added-value and diversification at a portfolio level.
- Following this approach, the impact is naturally embedded at the core of the investment strategy, further rewarding investors with meaning in their allocations.
- Finally, this interest for sustainability by investors can be leveraged by international organisations and NGOs to scale their impact through *Blended Finance* infrastructures and fill sustainable investment gaps.

2.1 Consulting Business: Services



- White Stag Investing has a highly-skilled and *independent investment consulting business* in Responsible Finance, with specialization in natural capital themes such as **Water, Oceans and Biodiversity**.
- It supports *leading financials institutions* in **adapting their investment processes and strategies** to the new environmental realities of the 21st century.
- WSI strives in **bespoke mandates** where a client aims to explore a new idea or way of doing things.
- If you need flexible **investment analysis and/or engineering services** done under pressure and for something that has never been done before, then *White Stag Investing* is probably the right partner for you.

2.2 Consulting Business: Key Competences



2.3 Consulting Business: Past Projects



1) *Blue Impact Asia Blended Finance Structure:* Development with the Ocean Assets Institute (OAI) of a blended finance structure to support Ocean SMEs in the APAC region.

2) *Water Transition Methodology:* Transition strategy and investment process to steer the bank's entire asset book onto a water-secure path.

3) *Blue Economy Knowledge Product:* Landscape analysis with OAI of the Blue Economy, its challenges, opportunities, investment gaps, market failures and potential sources of financing.

4) *Marine Protected Area Investment Due Diligence:* Full investment due diligence with ESG integration on an MPA in Fiji.

2.4 Consulting Business: Past Projects (2)



- 5) **WWF Switzerland Biodiversity Risk Method:** Support for a RfP.
- 6) **Sustainable Market Strategies ESG Hedge Fund & Services:** Writing notes on ESG portfolio construction, water and ocean stock opportunities.
- 7) **Start-Ups Business and Financial Modelling:** Design of business models and financial projections for water and ocean start-ups.
- 8) **SIGLO ESG Portfolio Simulation Tool:** Simulating ESG portfolios to determine their profitability vs. traditional benchmarks.
- 9) **SIGLO Insurance Linked Securities (ILS) Risk Tool:** Design of a risk monitoring tool for climate reinsurance funds.

3.1 *Research Business: Analyses*



- White Stag Investing also screens investment opportunities in the themes of Water, Oceans and Biodiversity.
- This consists of **investment analyses** on their best securities: stocks, start-ups, public or private funds.
- And **market analyses** on their products and differentiation in terms of strategy, sustainability and performance.
- These analyses help investors find new sources of **diversification and value** in sustainable opportunities.

- White Stag Investing also write daily insights on sustainability and market trends on LinkedIn:

<https://www.linkedin.com/in/nlr-whitestaginvesting/>

3.2 Research Business: Products Lists



-  **WSI Water Stocks**
-  **WSI Water Public Equities Funds**
-  **WSI Water Venture Capital & Private Equity**
-  **WSI Ocean Stocks**
-  **WSI Ocean Funds**
-  **WSI Blue Start-Ups (Water & Ocean)**
-  **WSI ESG Funds & S&P500 Resilience**

*Available on Demand
and on Refinitiv
Eikon's Platform*

4.1 *Investors Relations*



- White Stag Investing finally introduces **selected start-ups** in sustainability to investors for their capital needs.
- **Oxi-zen** is a blockchain marketplace for secured, transparent, and scientifically-rooted carbon sequestration projects.
- **Real-Time Purity (RTP)** is a one-stop solution (hardware, software, and SaaS) to automatically monitor water quality in water systems. Their flagship REX-100 Machine can detect 12 elements at once without requiring any chemical solutions or active sampling.

5.1 White Stag Investing: Nicola Lei Ravello



After 7 years as an investment analyst in the hedge funds industry, I've started covering sustainable finance on my own initiative since early 2019. I have been heavily engaging the (sustainable) finance community on how to recognize sustainability as a long-term source of value and strategically integrate it in portfolios. I've researched the most promising sustainable themes for the transition, which I defined as Water, Oceans and Biodiversity and analysed their investment universes. I am now working as an independent consultant in these spaces, supporting leading financial institutions in their strategic and sustainable analysis. I further serve frontline investors with new insights and value propositions in the realm of sustainability through daily LinkedIn insights. I have a B.sc. in Economics from HEC Lausanne and a M.sc. in Finance from the University of Zürich. I am finally an avid cook, karateka and windsurfer.

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5.2 Trusted Partners



SUSTAINABLE
MARKET
STRATEGIES

*Leading ESG Research Provider and
ESG Long-Short Equity Fund*



*Independent Consultant on
Sustainable Business Practices*



*Specialised NGO in the Blue Economy
and Marine Finance*



*Leading NGO on Sustainable
Finance*



Leading ESG Data Provider

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