

ScopeFour Capital

Marketing and Communications Plan

2024

↗ Prepared by **Heather Beatty** for the
Duke Environmental Management Masters Project

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Executive Summary

What is the state of climate investing today? The good news is that investors are more aware than ever that climate change is important and represents both a risk and an opportunity in their portfolios.

To put it into perspective, the appetite for climate strategies has grown 6-fold over the last 5 years from \$93 billion to \$573 billion. That's the good news.

The bad news is that we need **\$3-4 trillion dollars annually** to meet our commitments. Up to this point, most climate strategies have invested in companies categorized as 'lower carbon' like Apple or Microsoft, meaning they generally have low Scope 1, 2 and 3 emissions. However, just because they're not contributing to the problem doesn't mean they're solving it.

Launched in 2022, **ScopeFour Capital** represents the next phase in climate investing. The companies in our portfolio are enabling the world to meet net zero commitments by offering products and services that reduce greenhouse gas emissions globally.

The Masters Project's objective is to assist ScopeFour in identifying and targeting the right audience for client acquisition by developing a comprehensive marketing communications plan. Marketing communications is a critical element of success, particularly when introducing an innovative and sometimes controversial concept (climate) to investors.

The marketing communications plan is structured to:

- 1) Target early adopters that have already implemented a net zero pathway
- 2) Establish key messaging
- 3) Identify an effective communications and content strategy across media channels
- 4) Identify key determinants of success
- 5) Outline the appropriate budget and timeline through year-end 2025

Situation Analysis

The current challenge to grow the firm is threefold:

- **Sales cycle:** ScopeFour is targeting investors with institutional capital. Institutions typically consist of large pools of capital between \$500 million to over \$250 billion in assets. The sales cycle for these entities is typically 18 to 36 months and oftentimes longer for a newer entity and unproven track record.
- **Education on Fit:** Climate solutions is an evolving and still relatively nascent segment of the investment world, particularly for U.S. Investors. Investors need education on how and where to place climate in their portfolios. There is a need for a more universal benchmark and climate-oriented data for investors to measure climate-oriented investment managers.
- **Macro Headwinds:** ESG and climate investing has received recent political backlash, which has dampened interest. Further, recent economic dynamics have been challenging for the climate space overall due to rising interest rates and inflation.

COMPETITION

↳ Public equity climate funds generally fall under three categories:

- 1) *Climate Solutions*
- 2) *Climate Transition*
- 3) *Low Carbon*




ScopeFour falls under the Climate Solutions category. We uncovered 15 direct competitors and conducted a peer analysis, looking at messaging, performance and risk metrics.. Most peer strategies have been launched by large organizations who are not primarily focused on climate. Among other insights, the analysis assisted in identifying ScopeFour's risk/reward as attractive and our specialization and science-led approach as a key talking point.

**See Appendix, Exhibit A for Excerpts from Peer Analysis

AUDIENCE PROFILE

↳ To tailor our messaging, we first identified which type of institution would be early adopters. Within the institutional investor landscape, we identified:

Mission-aligned family offices
Religious organizations
Endowments and foundations
Healthcare organizations

 JOB FUNCTION	 BUYING BEHAVIOR	 PAIN POINTS/CONCERNS
<ul style="list-style-type: none"> • Conducts due diligence and manager selection • Influence - High • Accessibility & Availability - Low • Budget Control - High 	<ul style="list-style-type: none"> • Look for climate-oriented strategies • Looks for the 'edge' and whether the product meets the needs of the endowment • Slow to make decisions • Prefers relationship, pedigree or track record 	<ul style="list-style-type: none"> • Career risk • Manager underperformance – need to explain to the board or management • Climate solutions and public markets not perceived as an alpha driver • New manager risk

The decision makers in these roles are highly sought after. They tend to be barraged with emails, have little time and often like to be introduced by people they know rather than cold called.

Messaging

We spent time narrowing our positioning and messaging to target our ideal customer profile. The first step was to establish a one paragraph elevator pitch, or Positioning Statement (see Appendix A). From there, we condensed it down to one or two sentences.

Elevator Speech






ScopeFour Capital is a diverse-owned and female-led investment management firm that invests in public companies scaling the most economically viable and currently impactful climate solutions. We integrate a science-led approach and are positioned to both financially benefit from the commitments to net zero and materially contribute to reducing global emissions. See Appendix, Exhibit B for complete messaging.

We used our peer analysis to determine our edge:

OUR EDGE

- **Specialization**
Focused solely on investing in companies fueling decarbonization
- **Science-Led Approach**
Leveraging the expertise of ScopeFour Climate Council and science-based organizations
- **ScopeFour Climate Taxonomy**
Framework provides a comprehensive pathway to emission reduction by Investing in six key themes

We also identified the benefits we provide to clients that invest with us.

<p>Working with ScopeFour offers clients:</p> <ul style="list-style-type: none">  Exposure to a multi-decade secular growth trend  High conviction active management  Excess uncorrelated returns  Portfolio diversification  Net zero alignment 	<p>Our Positioning Statement, Elevator Speech and Tag Line are used consistently in marketing including in sales meetings, outreach to prospects, on the website and in social media.**</p>
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Brand Development

↳ **Positioning and messaging contributed to the look and feel of the organization based on its mission and vision.** Keywords that underscore the look and feel include impactful, accountable, accessible, intergenerational and integrity. We worked with a graphic design firm to create a logo, primary color palette, typography and iconography.

Logo and Naming

We wanted to stress **ScopeFour's mission** of contributing to lowering emissions globally in the branding by visually representing a shift from Scope 1,2,3 to Scope 4.



Color Scheme

The inspiration comes from earth tones using aerial photography of unique landscapes on our planet. Color gradients in the form of a temperature gauge can also be used as a direct link to the visual representation of mitigating and adapting to climate change.

Scopefour Blue HEX 0114B1 R16 G20 B91	Scopefour Green HEX 002154 R0 G20 B94	Scopefour Red HEX dc3d7e R220 G61 B30	Scopefour Yellow HEX ead94f R204 G203 B71	Scopefour Black HEX 242424 R38 G38 B38	Scopefour Grey HEX e5e5e5 R229 G229 B229
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Font/Typography

The brand's uniqueness comes out with this distinct type. This font showcases the brand's individuality amongst a sea of generic investment companies. At the same time, the font showcases a team that fosters innovative thinking and execution.

NN Nouvelle Grotesk Light

NN Nouvelle Grotesk Light

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Volore. Lorem Ipsum has been the industry's standard. It volut omnis esto volorede cum re moluptat rersped quam quaspid ebitati oditat arum volore volupeti?

El eum harchil molore sedicto ommolup tatur? Magnimus denestium sum que laborio. Ga. Em imint et aut ex esecabo. Ut que poriaspis .

Domain

After consideration around a variety of addresses:

- scopefour.com
- scope4capital.com
- scope4.com
- scopefourcapital.com

We settled on **scopefourcapital.com** to ensure people understood it is a financial services company. We wanted to spell out the word four to reflect the professionalism of the industry. The number 4 has a more casual feel.

Photography

The imagery is primarily through aerial photography with a focus on the uniqueness of our earth and bringing an optimistic vibe. There is an emphasis on human relevance in relation to climate.



Communications Strategy

Business Goals

It's critical the marketing communications plan dovetails into the firm's near-term business goals:

1. Onboard aligned strategic partners

Launching an investment firm has a relatively high burn rate. The firm is in discussions with capital partners to bridge our operating capital as we bring on new clients over the next 1-3 years.

2. Recognition as an innovator and leader in the field.

ScopeFour is a new and relatively unknown entity that needs to build trust and recognition in the marketplace.

3. Proper allocation of resources to ensure long-term success.

Having fiscal restraint and spending money on the right items is also a key part of whether any startup is successful.

Marketing Goals

We leveraged the situation analysis and messaging to identify three clear objectives that support our overarching business through 2025:



Investors put their money with firms they can trust. By actively distributing thought leadership and engaging with prospects, we will build recognition and garner trust. This in turn will lead to adding clients and growing assets in our flagship strategy.

↳ Strategy and Tactics

Strategy and tactics are all about the blocking and tackling of the plan and identifying **HOW** we will reach our goals. To best reach our audience of institutional investors, we have developed four strategies and underlying tactics.

DELIVER DIFFERENTIATED CONTENT	BUILD AN ONLINE PRESENCE	ENGAGE FACE-TO-FACE	LEVERAGE INFLUENCERS
<ul style="list-style-type: none"> • One minute climate investing explainer videos • 1-2 'insights' per quarter 	<ul style="list-style-type: none"> • One blog post weekly • Double number of Linked In followers • Grow quarterly newsletter by 200 subscribers annually 	<ul style="list-style-type: none"> • 45 high quality prospects per quarter • 1 speaking engagement per quarter • Education luncheons and events 2x/year 	<ul style="list-style-type: none"> • Engage with industry organizations IEN - MIE - CERES • Four press mentions or op eds per year BLOOMBERG WITH INTELLIGENCE P&I II

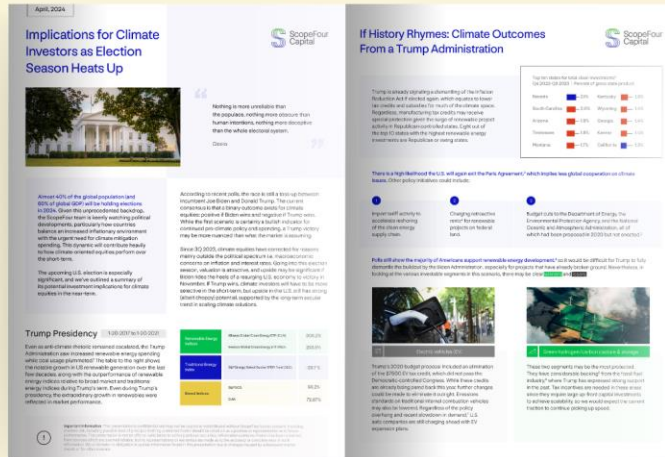
Delivering Differentiated Content

Content execution is designed to establish ScopeFour as a thought leader and build credibility as a new market entrant. Overtime, strong content will deliver prospect engagement, drive inbound inquiries and establish the firm as a premium investor in climate-oriented public equities.

➤ Awareness

ScopeFour has developed an interactive mailing list of ~500 prospects and distributes a quarterly newsletter through MailChimp on portfolio performance, recorded speaking engagements and written climate insights and white papers on important topics for the audience. Topics include Impact in Public Markets and How Elections Will Impact the Energy Transition. See Appendix, Exhibit G for examples of thought leadership.

Since COVID, investors have become more inundated with information. Videos and podcasts are more commonplace and relevant, creating accessibility. **ScopeFour** will launch a series of educational videos in 4Q24 to distribute relevant news commentary and explainers on our proprietary taxonomy and universe.



Building an Online Presence

ScopeFour's digital marketing model incorporates key hooks to keep the prospect engaged during the full timeframe and beyond as a client.

↳ Web Design and Development

The ScopeFour website is a source every potential client utilizes to ScopeFour and glean information on our approach, thought leadership, key people, and strategies. ScopeFour's website was launched in December, 2022. An upgrade of the ScopeFour website commenced in 2024, to incorporate newer messaging and place higher emphasis on Thought Leadership. Please refer to the Appendix, Exhibit F for snapshots of the website.

While most institutional investors don't tend to find managers through google search, a critical next step is to implement analytics that provide data on who is visiting the site and how they are navigating it.

↳ Social Media

LinkedIn is the primary social media platform ScopeFour utilizes to keep prospects engaged. We create weekly story lines and proof points that tie to our core position. On the official ScopeFour page, we post opinion pieces via the articles function and spotlight different Climate Council members, firm employees and other influencers. Our audience has grown to over 1K in under a year. The firm has begun engaging more frequently with influencers and tagging people to the post, which has increased followers.

Interactivity to lead investors back to the website is a key area of focus for 2024 by creating a repository of LinkedIn articles on the website to further memorialize the content.



Product Launch

After interviewing four well-reputed PR firms to target media and other influencers for launch day, we chose the firm that had a combination of flexibility, reasonableness of price and enthusiasm for the brand. A **Press Release** was issued in June, 2023, in conjunction with the launch of ScopeFour's Global Climate Opportunities flagship strategy. In addition to PR Newswire, the press release was posted on LinkedIn and the ScopeFour website. A campaign with relevant news publications was subsequently initiated and a prominent industry news publication, **FundFire** agreed to feature the firm.

The founder and portfolio manager were the predominant spokespeople with the message focused on delivering both impact and alpha for clients through a science-led framework.



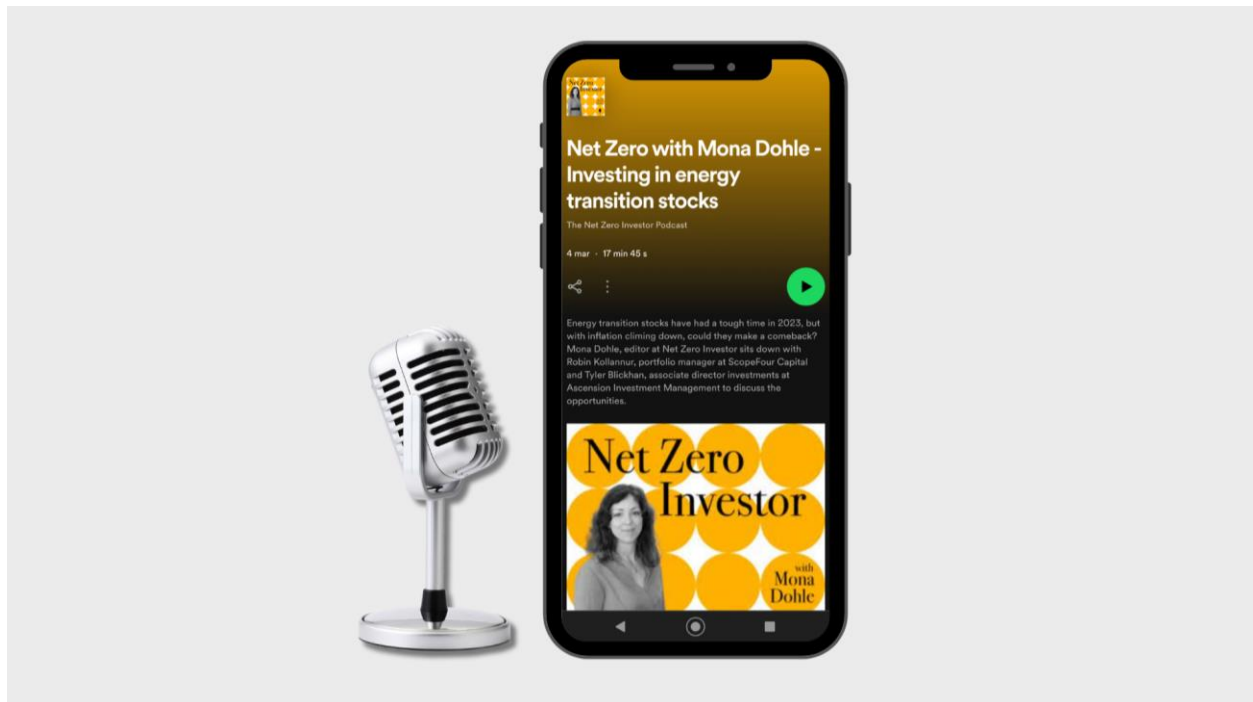
**See Appendix, Exhibit C for examples of published articles at launch.

Establishing Relationships

Online Outreach

Advertising

ScopeFour has earned and been featured on podcasts and in several trade publications through unpaid media, including Fund Fire, ESG Investor and Alternatives Watch. Paid media is not currently available due to cost constraints. In 2025, **ScopeFour** will hire a PR agency to curate media campaigns, promote additional features, curate press releases and work closely with larger players such as Bloomberg. See Appendix, Exhibit D for the full list of media and influencers.



↳ CRM

We have implemented **HubSpot** as our **CRM** system as a repository for contacts and meetings and a mechanism to track email engagement. HubSpot has a variety of other tools that are not currently being utilized. While tailored emails typically garner a higher response, ScopeFour will investigate marketing automation as an additional lever for mass outreach, particularly to distribute 2-pager Climate Insights.

↳ Databases

There are several databases to fill out as a conduit for investors that are searching for climate-specific products. The primary database is eVestment, a platform for asset owners to research and monitor managers as well as track progress and performance when conducting due diligence. **ScopeFour** updates eVestment quarterly. Paid databases will be added in 2025.

↳ Engaging Face to Face

ScopeFour Capital is a newer entity whose brand has not yet been established. Oftentimes it takes up to 10 years for widespread adoption to occur in the investment management sector. Acceleration of awareness and engagement can be achieved through a combination of online outreach, direct outreach and outreach through others.

↳ Direct Outreach

Investing in climate solutions through public equities is not yet a mainstream proposition for most institutions in the United States. Further, willingness to anchor a new manager without a 3-year track record represents a small percentage of allocators. We have built a curated list of ~1,000 investors we think would be interested in investing early in ScopeFour. The purpose of online outreach and influencer engagement is to qualify the investor and facilitate a one-on-one meeting. Our stated goal is to conduct 15-20 high quality meetings per month.

↳ Outreach through Others

After conducting extensive analysis on the wide range of investor groups and industry conferences we settled on membership with two influential organizations whose constituency reflects our target audience: the Intentional Endowment Network and Mission Investors Exchange. Both organizations allow members the opportunity to share climate insights and independent views that will be widely distributed.

As the budget expands, speaking at conferences and on high profile podcasts will be incorporated into influencer engagement. A series of curated hosted events will be launched in late 2024 in a variety of high traffic cities with climate scientists, policymakers and investors to further drive interest. Please see the Appendix, Exhibit E for a list of conferences and events.

Acknowledging and tagging influencers on LinkedIn will become an increasingly important part of our social media campaign.



Plan Management

Resources

Executing well on a marketing communication plan requires resources.

It's important to think about what is important to get the best bang for our buck. Especially for a start-up that is brand building, it's healthy to dedicate over 10% of your overall budget to marketing which we have done in both 2024 and 2025.

As we secure operating capital, we plan to add resources in 2025 by sponsoring more speaking events, hiring a marketing coordinator and producing video content.

Marketing Budget	2024	2025
Conferences	\$2,500	\$25000
Print Design	\$12,000	\$15000
Website	\$2,000	\$5000
Video Designer	\$0	\$15000
Travel/Events	\$50,000	\$60000
Partnerships	\$2,950	\$5000
Marketing Coordinator	\$2200	\$50000
TOTAL	\$71,650	\$175000

Assumptions

- . 2024 budget represents 16% of overall budget
- . 2025 budget represents 19% of overall budget
- . Assume 1 client of \$30M and additional operating capital raise of \$2M
- . Website includes design, hosting and SEO
- . Video costs are \$1,500 per video
- . Marketing coordinator is consultant/contractor
- . Travel/events include events hosted in different cities
- . Conference budget includes sponsored speaking engagements

Measurement

How do we determine we're successful? The obvious indicator is acquiring new clients and growing our revenues. Additional metrics have been established that indicate we are moving in the right direction.

	Apr-24	Dec-24	Dec-25
Metrics45			
Newsletter			
Open rates	20-40%	40%	50%
Click through	10-20%	20%	30%
Subscribers	545	680	860
Website			
Number of visits	35	100	300
Social Media (LinkedIn)			
Number of followers for S4	1,074	2,000	3,500
Number of followers for H. Beatty	3,487	5,000	8,500
Media			
Press mentions / op eds	1	5	10
Speaking Engagements			
Number of speaking opportunities	2	12	15
Meetings			
Number of meetings with prospects	85	180	180
Follow-on meetings	15	54	72

Appendix

Exhibit A. Excerpts from Peer Analysis, full report available upon request

Executive Summary



Motivation

- Investors are allocating to climate strategies, but are unclear on which 'bucket' to put it in due to a lack of standardized definitions
- Most common databases do not break down strategy universes by climate, making it difficult to identify climate-oriented strategies
- Within climate, there is a wide spectrum of approaches; the majority are focused on investing in low carbon assets, which misses the true alpha opportunity

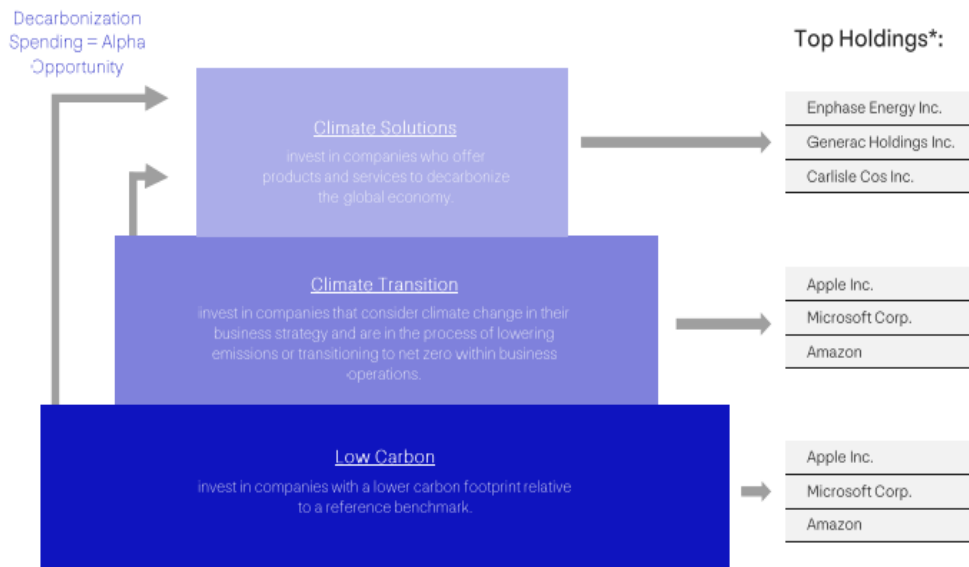
Methodology

- We have identified 15 strategies that form a Climate Solutions Peer Group and constructed a framework for analyzing the climate solutions landscape
- We propose using WACI and Sustainable Revenues as key metrics to accurately assess climate risk and opportunity within the peer group
- We highlight index concentration as critical considerations when analyzing the risk profile of climate solutions strategies

Categories within climate strategies



We have identified three distinct investment objectives within climate strategies.

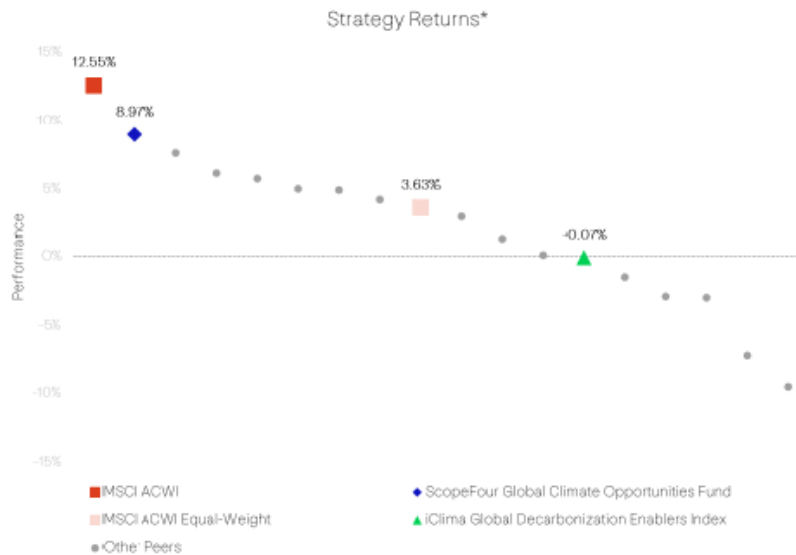


Source: Investing in Times of Climate Change 2023 | Morningstar, S&P Global.
*Climate Solutions holdings sourced from ScopeFour Capital. Climate Transition and Low Carbon example holdings sourced from fund factsheets.

Peer Group Analysis: Strategy Returns



ScopeFour is the top performing fund in the peer group and has also outperformed the iClima Global Decarbonization Enablers benchmark.



Appendix: Climate Solutions Peer Group



- Delaware Climate Solutions Fund
- GMO Climate Change Fund
- Impax Global Environmental Markets Fund
- Hartford Climate Opportunities Fund
- Rockefeller Climate Solutions Fund
- Shelton Sustainable Equity Fund
- Ninety One Global Environment Fund
- Veridien Climate Action ETF*
- Touchstone Climate Transition ETF
- Schroders Global Climate Change Equity Fund
- Candriam Climate Action Fund
- Wellington Climate Strategy
- BlackRock Future Climate and Sustainable Economy ETF
- JPMorgan Climate Change Solutions ETF
- Mirova Climate Solutions Equity Fund

*Veridien Climate Action ETF is not included in performance metrics because its inception date is after the performance period.

Exhibit B. Messaging

📌 **Positioning Statement**

ScopeFour Capital is a diverse-owned and female-led investment management firm that invests in public companies scaling the most commercially viable and currently impactful climate solutions globally. The firm utilizes a science-led approach to identify and invest in the 'picks and shovels' of the transition to net zero.

The **ScopeFour** Climate Taxonomy provides a comprehensive pathway to reduce emissions by investing in six key themes: Renewable Energy, Circular Economy, Green Infrastructure, Clean Technology, Discretionary Consumer and Sustainable Ecosystems. We measure portfolio impact by quantifying the Time Value of Carbon and Emission Reduction Potential for each climate solution and then mapping the solutions to a proprietary universe of 3,000 global companies, each with one or more solutions tied to its business model. Our Climate Council is a curated group of academics and experts that operates as a sounding board to further validate our impact thesis.

ScopeFour Capital creates value by integrating impact and alpha throughout our investment process. Our customized ranking factors and deep fundamental analysis uncovers a select group of companies we believe are best positioned to both financially benefit from the commitments to net zero and materially contribute to reducing global emissions. We do not believe in growth at all costs. Our quality bias ensures the portfolio companies have financial flexibility and are not dependent on policy or subsidies for growth.

Our strategies invest outside US tech companies that tend to be heavily weighted in a typical index. Importantly, we have been able to outperform the MSCI ACWI by 500 basis points since inception, while providing uncorrelated exposure to traditional markets.

📌 **Elevator Speech**

ScopeFour Capital is a diverse-owned and female-led investment management firm that invests in public companies scaling the most economically viable and currently impactful climate solutions. We integrate a science-led approach and are positioned to both financially benefit from the commitments to net zero and materially contribute to reducing global emissions.

📌 **Tag Line**

Alpha + Impact

Exhibit C. Examples of Launch Articles

[ScopeFour Capital Launches Innovative Climate Impact Investment Platform
\(prnewswire.com\)](https://prnewswire.com)

FUNDfire

Former First Eagle Exec Starts Climate-Focused Boutique

The firm's staff includes an executive from Rothschild Asset Management and the head of operations consultancy FiSolve.

By Briana Monsanto | June 2, 2023

ScopeFour Capital, an investment management firm led by **Heather Beatty**, a former head of global consultant relations at **First Eagle Investments**, debuted its initial strategy focused on decarbonisation investing this year.



Heather Beatty

Beatty founded the El Segundo, California-based firm in mid-2022 after taking an interest in climate investing and the "generational investment opportunity," it offers.

"[T]here really aren't a lot of investment managers that are focused on climate as it relates to the underlying solution," said Beatty. "[W]e think that there's a gap in what allocators are looking for and what managers are offering, and we think that this opportunity is still under-appreciated, particularly in the United States."

Beatty, who is also a **TCW** and **Thornburg** alum, is joined by **Robin Kollannur**, a portfolio manager and partner, and **Steven Yadegari**, who serves as chief operating officer. Prior to joining ScopeFour in January of this year, Kollannur was a managing director at **Rothschild Asset Management**. Yadegari founded **FiSolve**, a consulting firm that provides outsourced chief operations and compliance services to asset management and financial services firms.

The firm has developed a proprietary public equity "universe" of approximately 3,000 securities with business models tied to one or more climate solutions, said Beatty. It then is able to identify what climate events could appreciate the stock price for a company. The goal is to invest in companies that provide climate solutions for other companies that are trying to lower their emissions.

"There really aren't any universes that focus on climate solutions specifically," said Beatty. "And so oftentimes when portfolios are built, they're not built taking a look at materiality or looking at companies that are scaling these climate solutions within larger firms."

The launch comes at a time when ESG investments are continuing to pique the interest of institutional investors.

"Institutional investors are looking at companies' exposure to net zero-related transition costs and other risks due to socio-economic changes, including carbon taxation, a shift in consumer behavior and technology disruption," said **Azadeh Sabour**, senior vice president of climate solutions at **Morningstar Sustainalytics**.

Climate tools have been a key part of the effort. **AllianceBernstein** recently updated its Natural Hazards Index, which helps its fixed income teams plot areas vulnerable to climate change impacts, as reported. **State Street** also developed a State Street Carbon Asset Servicing Solution and rolled out depositary services to help asset managers, asset owners and other financial services institutions to integrate carbon-related assets into their portfolios, a statement from the firm shows.

Global institutional investors are expected to increase their ESG-related assets under management to \$33.9 trillion by 2026, according to a 2022 **PwC** Asset and Wealth Management Revolution report

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An Information Service of Money-Media, a Financial Times Company

Exhibit D. *Influencers & Media List*

Medium	Publication Name	Contact Name
Broadcast	BBC TV	Joe Crowley
Broadcast	CNBC	Diana Olick
Broadcast	CNBC	Hilary Lane
ESG Publication	ESG Investor	Chris Hall
ESG Publication	Green Daily by Bloomberg	
ESG Publication	Greenbiz	Grant Harrison
ESG Publication	Greenbiz	Joel Makover
ESG Publication	Greenbiz	Dylan Siegler
ESG Publication	ImpactAlpha	Roodgally Senatus
ESG Publication	Net Zero Investor	Michel Williams
ESG Publication	Net Zero Investor	Thomas Helm
ESG Publication	Net Zero Investor	Mona Dohle
ESG Publication	Responsible Investor	Gina Gambetta
ESG Publication	Robert Eccles	Robert Eccles
ESG Publication	Securing Our Climate	Alan Leung
ESG Publication	Sustainability Essentials News	

Mainstream	Bloomberg	Michelle Ma
Mainstream	Bloomberg	Tim Quinson
Mainstream	Bloomberg	Crystal Tse
Mainstream	Bloomberg	Kathy Burton
Mainstream	Bloomberg	Nishant Kumar
Niche Publication	Hedge Fund Alert/The grapevine	
Niche Publication	FundFire	Lydia Tomkiw
Mainstream	Financial Times	Chris Giles
Mainstream	Financial Times	Huw Van Steenis
Mainstream	Institutional Investor	Angelo Cavello
Mainstream	Institutional Investor	Julie Segal
Mainstream	New York Times	Catrin Einhorn
Mainstream	NYT	Julie Tate
Mainstream	NYT	Lisa Friedman
Niche Publication	Alternatives Watch	Susan Baretto
Mainstream	P&I	Hazel Bradford
Mainstream	P&I	Jennifer Ablan
Mainstream	P&I	Arleen Jacobius
Mainstream	Reuters	Svea Herbst-Bayliss
Mainstream	Reuters	Gareth Ragg
Mainstream	Reuters	Kate Abnett

Mainstream	with Intelligence	Caroline Ryan
Mainstream	WSJ	Lauren Thomas
ESG	WSJ Sustainable Pro	Rochelle Toplensky
Newsletter	ESG & Climate News	Tim Moohin
Niche Publication	AlphaWeek	Greg Winterton
Niche Publication	CTVC	Sarang Mani
Niche Publication	Diligent	Joshua Black
Niche Publication	Grist	Mia Torres, Galia Binder
Niche Publication	HEATED	Emily Atkin
Niche Publication	Inside Climate News	HannahLoss
Niche Publication	The Conservation	James Dyke, Robert Watson
Niche Publication	The New York Times Opinion	Alexandra Sifferlin
Podcast	Advancement	Ted Danson
Podcast	Amaly Legacy	Wahid Kamalian
Podcast	BBC The Climate Question	
Podcast	The Bid	
Podcast	Climate Finance Podcast	Jonas Tobiassen
Podcast	Climate Now	James Lawler
Podcast	Climate Rising, Harvard Business School	

Podcast	Global Investment Leaders	
Podcast	Intelligent Investor	Benjamin Graham
Podcast	Invest Like the Best	
Podcast	Investing Experts from Seeking Alpha	
Podcast	MacroHive	Bilal Jafeez
Podcast	Motivation 2 Invest	
Podcast	My Climate Journey	
Podcast	Planet A - Talks on Climate	Dan Jorgenson
Podcast	PRI Podcast on Apple	
Podcast	Sustainability Decoded	
Podcast	Sustainability Defined	
Podcast	TED Climate Podcast	
Podcast	The EY Sustainability Matters Podcast	
Podcast	The Green Investor	
Podcast	The Motley Fool	
Podcast	The Sustainability and Finance Podcast	
Podcast	Zero by Bloomberg	Oscar Boyd
Mainstream Media	WSJ	Amrith Ramkumar
Awards	Top 10 Leaders & Entrepreneurs	Zachary Bernard
Mainstream Media	Forbes	William Barrett

	Impact Entrepreneur	
Awards	HFM/With Intelligence	
Awards	Women in Sustainability Leadership	

Exhibit E. Conferences & Events

iConnections	Global Alts	1/29/24 - 2/1/24	Miami, FL
IEN	IEN Higher Education Summit	2/11-2/13/24	Long Beach, CA
US SIF	Sustainable Investment Forum	Sep-24	NY
Climate Week	CLIMATE WEEK	9/22/2024	NY NY
TIDE	TideSpark	TBD	Laguna Hills, CA
100 Women in Finance	Allocators In-Person NYC December 7	TBD	NYC
with Intelligence	PensionBridge ESG Summit	Expected Fall 2024	San Diego, CA
NMS	NMS Endowment & Foundation Winter Investment Forum	2/4/24-2/6/24	Scottsdale, AZ
PRI	PRI In Person	10/7/24-10/10/24	Toronto, Canada

Sun Valley Forum	Sun Valley Forum Climate Conference	TBD	Sun Valley, ID
UN	COP29	TBD	TBA
Phenix Group	Impact Summit America	TBD expected Fall 2024	NYC
PEI Group	Impact Investor Summit North America	TBD expected Fall 2024	NYC
Money Management Institute	<u>2023 MMI Emerging Managers Forum</u>	5/11/23 - 5/12/23	Denver, CO
PEI Group	Responsible Investment Conference 2023	TBD	NY NY
Grosvenor	Grosvenor Diverse and Women Managers Conference	Expected Summer 2024	NY, NY
NMS	Endowments & Foundations - Fall Forum	Expected Fall 2024	Boston, MA
GreenBiz Group	GreenFin23	June 2024 - TBD	
	Wall Street Green Summit	13-Mar	NYC
	Aspen Ideas	Miami	March 11 - 13
	<u>MSCI Institutional investor forum</u>	october 2024 estimated	West Sacramen to CA

	<u>Meketa Emerging Manager Roundtable and Summit</u>	october 2024 estimated	virtual
Opal Group	ESG & Impact Investing Forum	TBD	West Palm Beach, FL
DFMC	2023 DFMC Conference Denver	TBD	Denver, CO
GreenBiz Group	GreenBiz24	2/12-2/14/24	Phoeniz, AZ
ICCR	ICCR Fall Conference	Week of September 16 NYC	NY NY
TRS/ERS	Emerging Manager Conference	2/28/2024	Virtual
P&I	P&I influential women	9/12/2024	Chicago, IL
IEN	IEN 10 year anniversary gala	4/11/2024	Boston, MA
MIE	2024 National Conference	May 7-9	Los Angeles, CA
	Women's Forum	Feb-24	Boston, MA
Academy for Institutional Investors	<u>https://www.academyforinstitutionalinvestors.org/events/fall-academy-investment-forum/fall-forum-registration/</u>		email 6/21/23

	<u>Emerging Managers Conference NYS</u>	2/26/2024	Albany-
Markets Group	3rd Annual SoCal Forum	6/4/2024	Los Angeles, CA
ICCR	ICCR Spring Conference	3/19-3/22/24	NY NY
DFMC	National Catholic Winter Meeting	2/4/24-2/6/24	Fort Meyers, FL
ESG Investor	<u>ESG Investor's Nature Data for Institutional Investors event.</u>	TBD	London, UK
With Intelligence	<u>Pension Bridge Sustainability Conference</u>	TBD	CA
LongView Networks	Net Zero Investor's Annual Conference	Expected Fall/Winter 2024	London, UK

Exhibit F. *Snapshots of ScopeFour website*



Thought Leadership

We invest in one of the most significant growth opportunities of this generation and work with clients as a thought partner to identify thematic tailwinds in climate solutions.

[READ MORE ↗](#)



Climate Insights

April 2, 2024

[Implications for Climate Investors as Election Season Heats Up](#)



Speaking Engagements

March 4, 2024

[Net Zero with Mona Dohle: Investing in Energy Transition Stocks](#)



Investor Letters

February 7, 2024

[Global Climate Opportunities 4Q23 Commentary](#)

Our Firm

Launched in 2022, ScopeFour Capital is a diverse-owned investment manager that utilizes a science-informed framework to identify and actively invest in global public companies scaling economically viable and currently impactful climate solutions.

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Our Approach

Decarbonization is a multi-decade secular trend. Depending on region and applicability, differing climate mitigation and adaptation tools and technologies are being implemented. ScopeFour believes alpha is generated through active management and fundamental analysis to determine which public companies are best equipped to capture this opportunity.

[READ MORE ↗](#)



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Join our mailing list

Sign up to gain access to our thought leadership and learn more about our six climate themes.

Email address

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Exhibit G. Example of climate insights and thought leadership

[ScopeFour_Commentary_1Q_2024.01](#)

[Implications for Climate Investors as Election Season Heats Up](#)

[Look Beyond the Default Option – ESG Investor](#)