

# Case Study: Moody's Analytics

## *Moody's Analytics Uses EthosData Data Room Platform for its Social Performance Assessments*

### Client background

Moody's Analytics, a unit of Moody's Corporation, helps capital markets and credit risk management professionals worldwide respond to an evolving marketplace with confidence. The company offers unique tools and best practices for measuring and managing risk through expertise and experience in credit analysis, economic research and financial risk management.

Moody's Analytics' Social Performance Group was founded to provide innovative products and services for individuals and organizations interested in socially responsible investing.

### Business Objective

One of Moody's Analytics services is the preparation of Social Performance Assessments (SPAs) for microfinance institutions (MFIs), a powerful tool that analyzes the infrastructure and processes an MFI has in place to achieve its social objectives. This analysis combines field evaluations with comprehensive scoring and monitoring of an MFI's practices to provide a globally comparable assessment grade. The SPA enables investors to make more informed socially oriented decisions, highlights an MFI's strengths and limitations, and assesses the likelihood of an MFI having a positive effect on the lives of its customers.

### Challenge

Moody's Analytics needed a way to manage the flow of documentation to complete SPAs with MFIs in a secure and efficient manner. The solution needed to be secure and user-friendly, with customizable access and permission controls for all parties involved.

### EthosData Solution

EthosData worked with Moody's Analytics to build a secure platform based on its robust award winning virtual data room technology. The simple solution enables Moody's Analytics to easily manage a complex permission structure and segregation of access. With email alerts for new uploaded information and 24/7 support, the platform became a fundamental

*6 key social performance factors with over 140 sub-factors.*

*Approximately 400 measurable indicators.*

*More than 125 investors, MFIs and MFI networks, development agencies and service providers involved in creating the SPA factors and sub-factors.*

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*Using a Virtual Data Room enables to securely manage all deal documentation and focus on executing your transaction.*



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part of the SPA documentation workflow.

## Benefits

The jointly designed solution was implemented and launched in two months and has been used by all of

the MFIs that have gone through the SPA process. The results have been very positive with a significant reduction in administrative work for Moody's Analytics and its affiliates while increasing transparency and security.

## Testimonial

*"We are very pleased with our collaboration with EthosData for this important project. The platform has become a fundamental part of Moody's Analytics SPA process and we now feel very comfortable working and sharing documents with multiple parties around the globe. The platform is reliable, easy to use and the support from the EthosData team has been great."*

Jody Rasch, SVP Social Performance Group.

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EthosData is a global provider of Virtual Data Room and confidential document sharing services.

Our dataroom service allows organizations to exchange confidential information securely and efficiently. Our services include Virtual Data Rooms, Virtual Board Rooms, Fund Management and Investor Communications.

Since 2007 EthosData's Virtual Data Rooms have been helping businesses exchange critical information. Today EthosData's secure data room technology is used by tens of thousands of professionals. Our clients include 8 of the top 10 global financial organisations and 4 of the top 5 global law firms.

For further information please contact us:

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