

Data Portal Public User Guide

November 2023



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Public Users

This section of the user guide is relevant for public (non-PRI signatory) users. Public users can view Transparency Reports without logging in to the Data Portal.

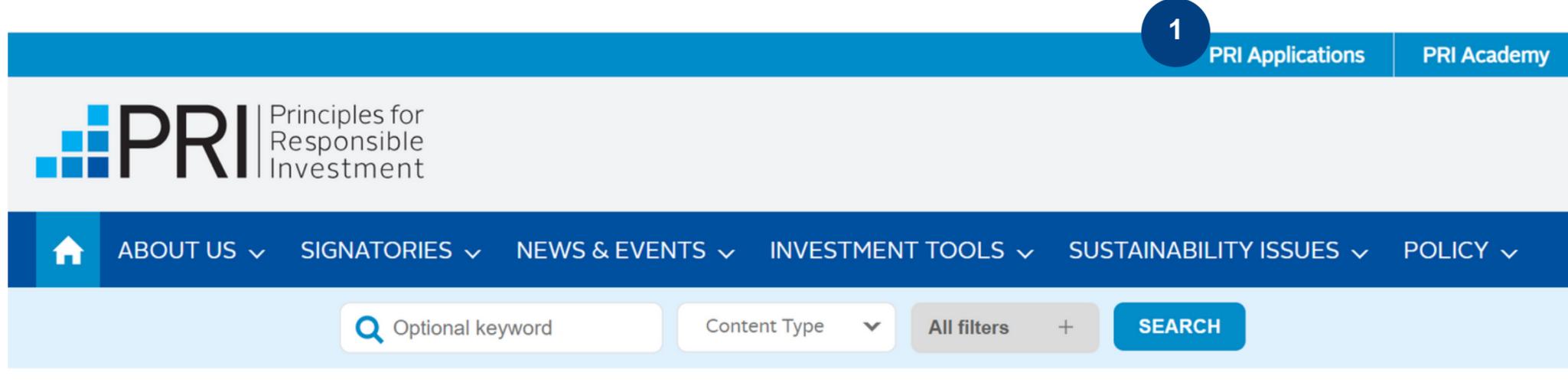
Public users

Public users include all non-PRI signatory users of the Data Portal.

- Public users can view public Transparency Reports and high-level reporting summary statistics, without logging in to the Data Portal.
- Historic public reports from 2014 to 2020 are available on the PRI website, under "[Public Signatory Reports](#)".

Accessing the Data Portal

Public users do **not** need to log in to the Data Portal to view reports.



1 Users can access the Data Portal through the PRI website, by clicking on PRI Applications.

PRI Applications

Collaboration Platform

A unique forum that allows investors to pool resources, share information and enhance their influence on ESG issues.

[COLLABORATION PLATFORM >>](#)

Data Portal

PRI's central repository for reporting data. Public users can search and view signatories' Transparency Reports. Additional analytical functionalities and insight are available to signatory users.

2 [DATA PORTAL >>](#)



2 Then clicking on Data Portal on the PRI Applications page.

Accessing the Data Portal

Collaboration Platform | Data Portal | Reporting Tool | PRI Academy

PRI Principles for Responsible Investment

Register | Sign in

Home | Transparency Report | User Guide

DATA PORTAL

Welcome to the Data Portal.

The Data Portal is the PRI's central depository for the data that signatories report. It aims to provide signatories and other stakeholders with easy access to this data.

The 2023 reports are now available to investors under the Transparency Report and Assessment Report tabs. You can find more information on using the Data Portal in this [guide](#), while the 2023 [assessment methodology and guidance](#) provide more information on how we assess investors on their reporting. Service providers did not report in 2023. Please see our [FAQs](#) for more information.

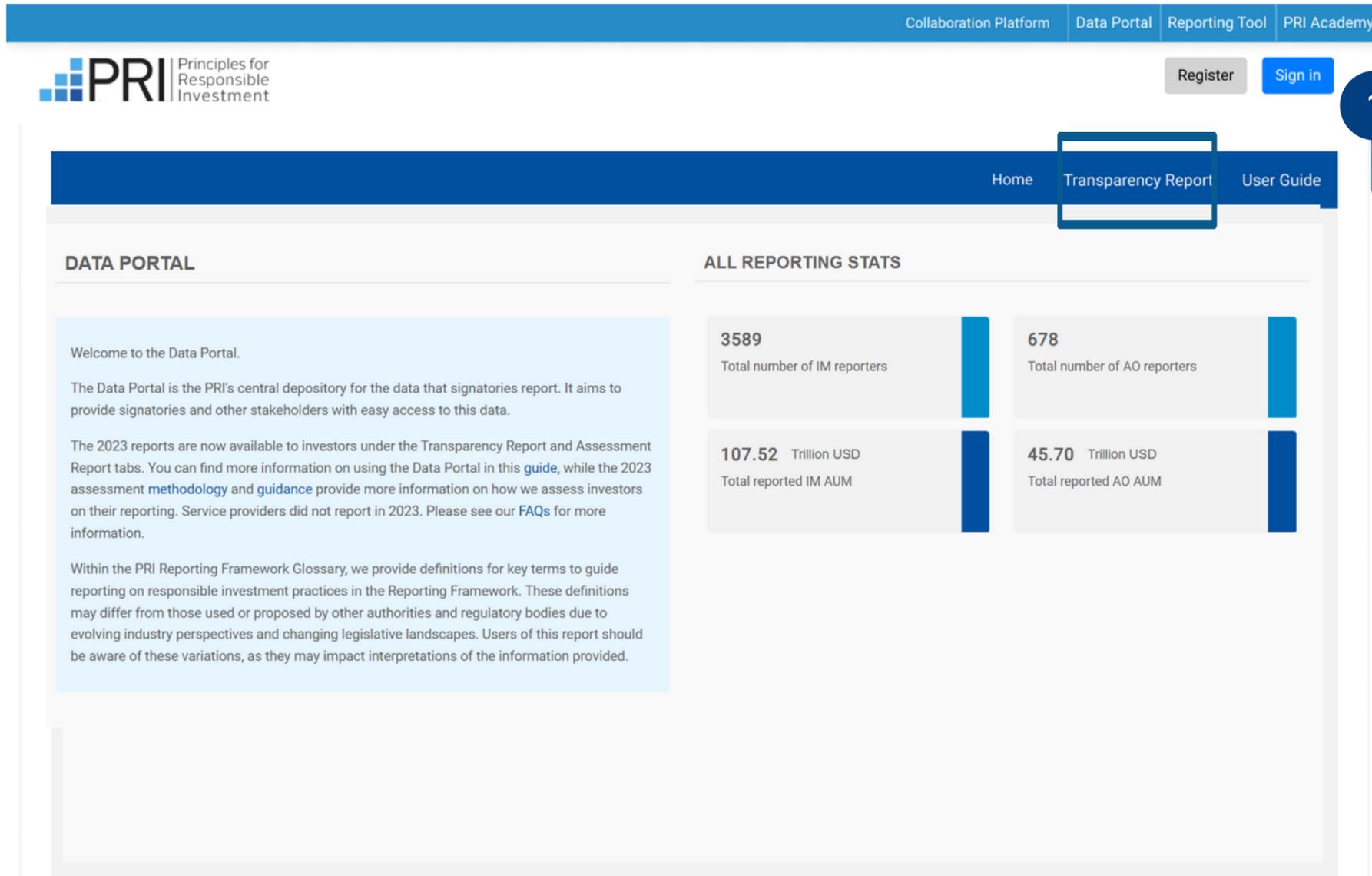
Within the PRI Reporting Framework Glossary, we provide definitions for key terms to guide reporting on responsible investment practices in the Reporting Framework. These definitions may differ from those used or proposed by other authorities and regulatory bodies due to evolving industry perspectives and changing legislative landscapes. Users of this report should be aware of these variations, as they may impact interpretations of the information provided.

ALL REPORTING STATS

3589 Total number of IM reporters	678 Total number of AO reporters
107.52 Trillion USD Total reported IM AUM	45.70 Trillion USD Total reported AO AUM

1 On the Data Portal home page, you will see high-level summary statistics for the current year's reporting cycle.

Viewing Transparency Reports



1 Click on the "Transparency Report" tab to view Transparency Reports.

Public Transparency Reports include all core indicators a signatory has responded to, as well as responses to plus indicators that they have agreed to make public.

These reports provide accountability and support signatories to have internal discussions about their practices and to discuss these with their clients, beneficiaries, and other stakeholders.

Viewing Transparency Reports

The screenshot shows a web interface for viewing transparency reports. At the top right, there are navigation links for 'Home', 'Transparency Report', and 'User Guide'. The main heading is 'Browse Transparency Reports'. Below this, there is a button labeled 'SELECT A SIGNATORY' and a text area that says 'No signatory selected'. A callout box with the number '1' points to the 'SELECT A SIGNATORY' button, stating: 'Click "Select a signatory" and a dialogue box will appear.' Below the button, a dialog box titled 'Select a Signatory' is open. It contains two radio buttons: 'Investors' (which is selected) and 'Service Providers'. Below the radio buttons is a search bar with the text 'Select...'. A callout box with the number '2' points to the search bar, stating: 'Choose between "Investors" or "Service Providers" and a signatory name in the search bar.' Below the search bar, there is a dropdown menu. A second callout box with the number '2' points to the dropdown menu, stating: 'Select the signatory organisation from the dropdown menu to view their Transparency Report.'

Viewing Transparency Reports

Browse Transparency Reports

SELECT A SIGNATORY

Year

2023

Search for an indicator

Please select a module

View/Download

All Modules
 Climate only
 Senior Leadership Statement only

Select Module, Section & Indicator

Module: Select a Module
Section: Select a section
Indicator: Select an indicator

DOWNLOAD PUBLIC REPORT (PDF)

1

1 Select the Reporting Year from the dropdown list.

2

2 The **View/Download options** will differ based on the type of signatory selected (see previous page).

Investors only generate public versions of **RI Transparency**, **Climate Only** and **Senior Leadership Statement Only** reports. Service providers did not report in 2023 but can view their other reports.
See the full Reporting Framework for investors and service providers for more information.

3

3 Navigate between different sections and indicators within each module to see the different responses.

Viewing Transparency Reports

Browse Transparency Reports

1

OO 1

There are **two ways** users can search for an indicator in a Transparency Report: by using the search bar or by using the dropdown menus to select a module, section or indicator.

1 Type the name of an specific indicator or module in the search bar.

2

Select Module, Section & Indicator

Module Organisational Over... x

Section Organisational infor... x

Indicator OO 1 x

Organisational information

Categorisation

Indicator	Type of indicator	Dependent on	Gateway to	Disclosure	Subsection	PRI Principle
OO 1	CORE	Signatory category	Multiple, see guidance	PUBLIC	Categorisation	GENERAL

Select the type that best describes your organisation or the services you provide.

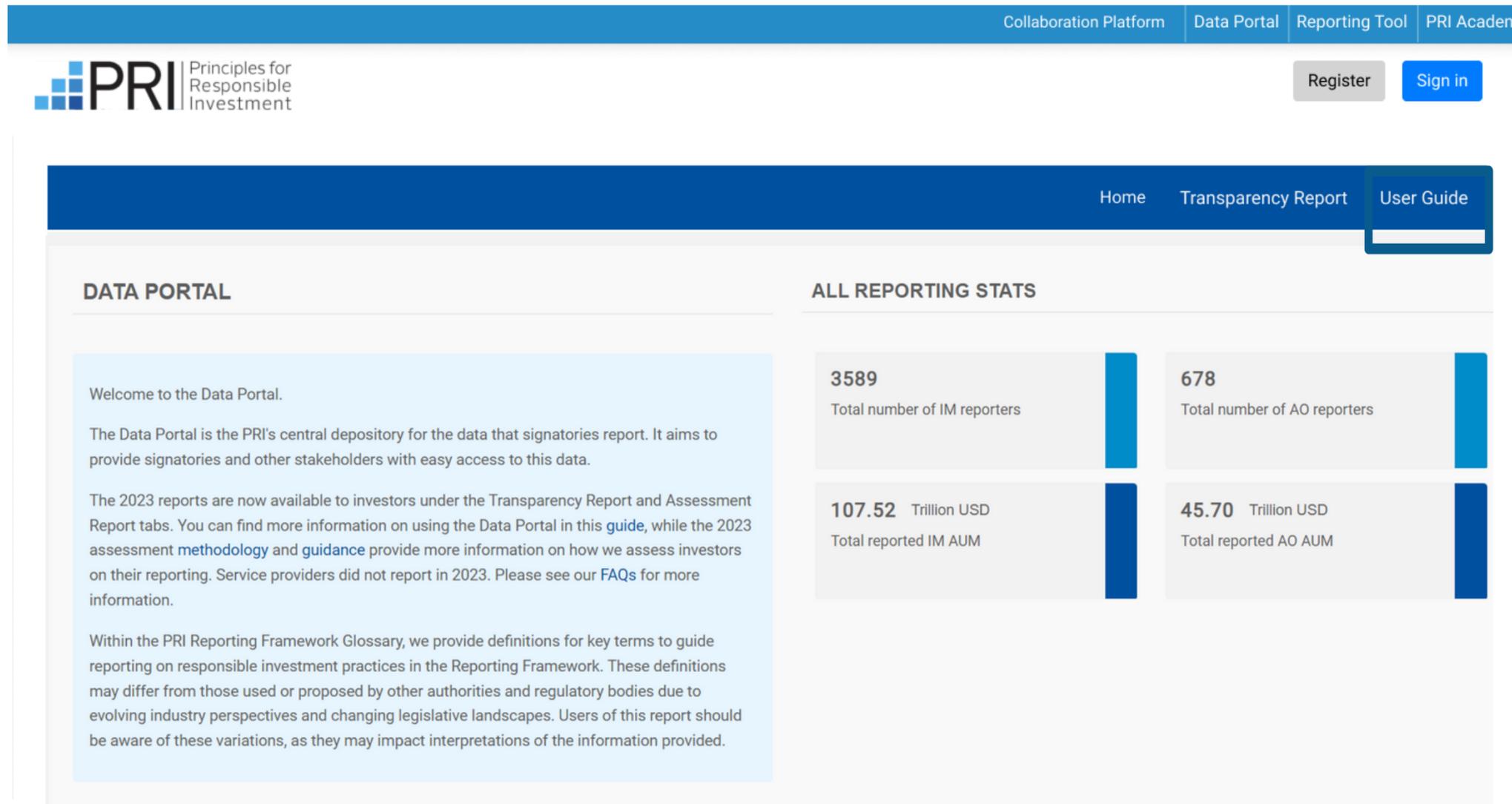
2 Select the specific **module, section, and/or indicator** of interest, to view the signatory's responses in the Data Portal.

Downloading Transparency Reports

To download a Transparency Report, select a signatory name and the module(s) of interest and click on the download button in the bottom left-hand corner.

The screenshot shows the 'Browse Transparency Reports' interface. On the left is a sidebar with a blue header 'SELECT A SIGNATORY'. Below it are sections for 'Year' (set to 2023), 'View/Download' (with radio buttons for 'All Modules', 'Climate only', and 'Senior Leadership Statement only'), and 'Select Module, Section & Indicator' (with dropdowns for 'Module', 'Section', and 'Indicator'). At the bottom of the sidebar is a button labeled 'DOWNLOAD PUBLIC REPORT (PDF)'. The main content area has a search bar 'Search for an indicator' and a prompt 'Please select a module'. A blue callout box with a '1' in a circle points to the search bar, containing the text: 'Once selected, the signatory's name will appear at the top of the page.' Another blue callout box with a '2' in a circle points to the 'DOWNLOAD PUBLIC REPORT (PDF)' button, containing the text: 'Click on the "Download Public Report" button to download the full report in PDF.'

Accessing the User Guide



1 Return to this user guide at any point by clicking on the **User Guide** tab.

Public users can also access the [Signatory User Guide](#).

Thank you

If you have any questions, please contact reporting@unpri.org.

Look out for more new features in the Data Portal, and stay up to date with the latest Reporting and Assessment news on [R&A Updates](#).

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