



Student: Irene (Xi) Shao
Position: Intern, Responsible Investing & Corporate Governance, Total Fund Management
Host organization: Ontario Teachers' Pension Plan

Ontario Teachers' Pension Plan (OTPP) is Canada's largest single-profession pension plan, with \$242.5 billion in net assets. It pays pensions and invests plan assets on behalf of 318,000 working and retired teachers. OTPP invests to deliver outstanding service and retirement security for their members while leaving a lasting, positive impact on the world. OTPP brings long-term thinking and active investing to help build better businesses.

The Responsible Investing Team leads the development of Ontario Teachers responsible investing strategy and supports the integration of ESG factors in the Plan's investment processes. This includes partnering with investment teams to identify ESG risks and opportunities throughout the investment lifecycle in private and public equity investments and conducting qualitative and quantitative research and analysis on ESG topics. The Corporate Governance Team is guided by 4 Pillars of Board Effectiveness, works to ensure companies and markets adopt leading governance practices and create effective boards. Through quantitative and qualitative research along with peer networking, CG continually seeks to develop new knowledge that pushes the boundaries of good governance.

Responsible Investing



Integrate

Integrate ESG considerations into investment process to manage risk and add value.



Engage

Engage with portfolio companies to promote change and nurture success, ultimately enhance their value creation.



Influence

Help create a supportive and sustainable business environment.



Evolve

Evolve to build our institutional knowledge and to keep ahead of the curve.

Major Projects



ESG Due Diligence



Risk Management



Net-Zero & Decarbonization



Climate Change



Portfolio Carbon Footprint



Biodiversity & TNFD



Proxy Voting



Thought Leadership

Skills Learned/Enhanced

➤ Technical Skills

Excel (vertical lookup, fuzzy lookup, functions, data model, pivot table, macro), PowerPoint, PowerBI, Bloomberg Terminal, SQL.

➤ Platforms

Sustainalytics, MSCI, TruValue Labs, Factiva, Trucost, Capital IQ, EDX, Glass Lewis.

➤ Soft/Qualitative Skills

Problem-solving, cross-teams working, critical thinking, leadership, time management, attention to details, creativity, agility, presentation, communication, report writing, research, building networks.