



Invest for impact · Investir pour l'impact

## **Overview**

More and more investors are shifting their capital towards investments that generate intentional and measurable impact, but a lack of visibility into information on private market offerings remains a barrier.

Increase your reach, exposure, and likelihood of finding the right investor for you by showcasing your fund, product, or investment offering on the SVX Impact Index. You will join a carefully curated selection of products ranging from private equity funds and community land trusts to community bonds and social impact bonds.

## **Why should I choose the SVX Impact Index?**

### *Gain Exposure*

Join a league of trailblazers at the forefront of impact investing. With 200 impactful products already in the database and an existing network of hundreds of impact investors, your product will achieve significant reach in the Canadian impact investing community.

### *Put Yourself on the Impact Map*

Your products will be on the largest repository of impact investment products in Canada. Get on the single access point for impact market information for asset owners, asset managers, researchers, and other key stakeholders in impact investing.

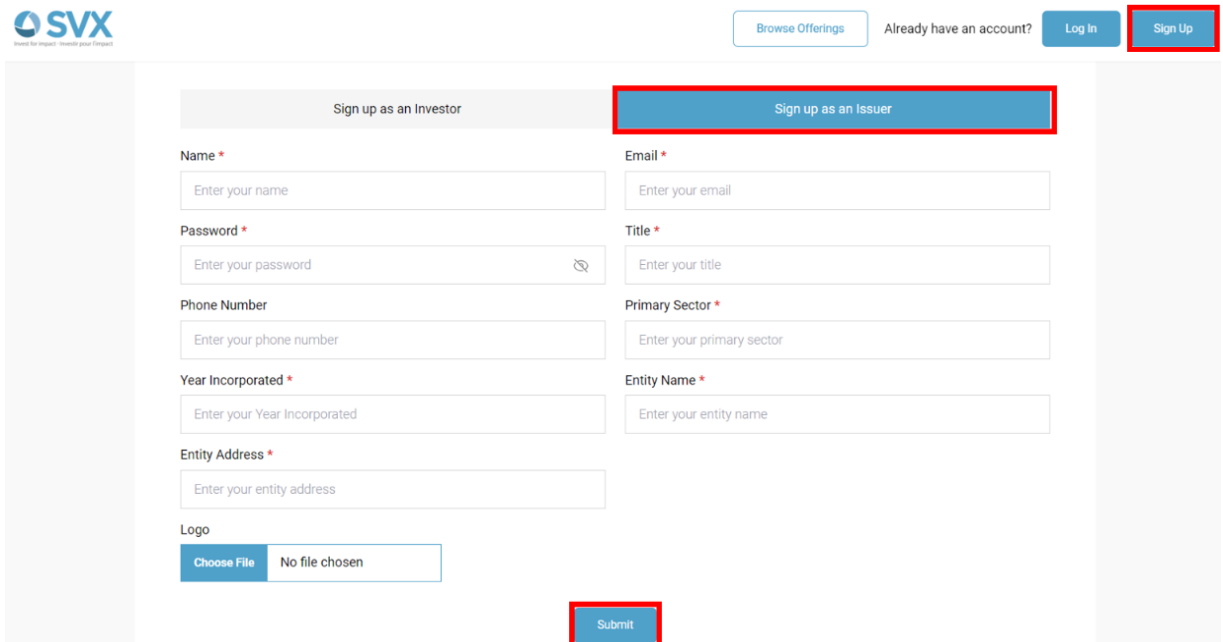
### *Foster Growth and Development*

Get connected with like-minded actors in impact investing in Canada. Our network can foster collaborations, partnerships, shared learning, and feedback to drive your growth and development. There is no cost for issuers to post on the SVX Impact Index.

Thank you for your interest in the SVX Impact Index. This guide will walk you through how to sign up and set up an offering as an issuer.

## Sign-up Process

1. Please [click here](#) to navigate to the site.
2. Click "Sign up as an Issuer" (it will turn blue).



The screenshot shows the SVX registration interface. At the top left is the SVX logo with the tagline "Invest for impact - Investir pour l'impact". To the right are navigation buttons: "Browse Offerings", "Already have an account?", "Log In", and "Sign Up" (highlighted with a red box). Below these is a registration form with two tabs: "Sign up as an Investor" and "Sign up as an Issuer" (highlighted with a red box). The "Sign up as an Issuer" form contains the following fields:

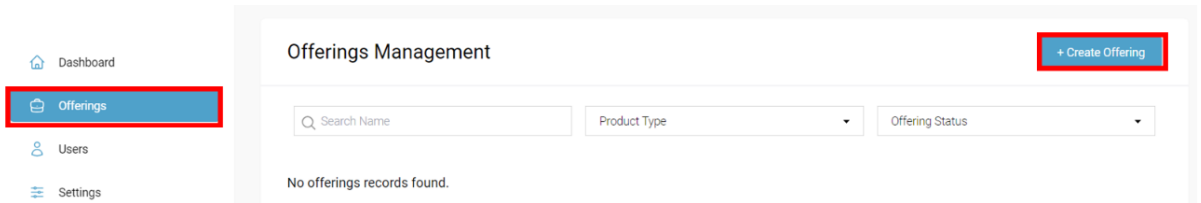
- Name \* (text input)
- Email \* (text input)
- Password \* (text input with a visibility toggle icon)
- Title \* (text input)
- Phone Number (text input)
- Primary Sector \* (text input)
- Year Incorporated \* (text input)
- Entity Name \* (text input)
- Entity Address \* (text input)
- Logo (file upload button with "Choose File" and "No file chosen" text)

A "Submit" button is located at the bottom center of the form, also highlighted with a red box.

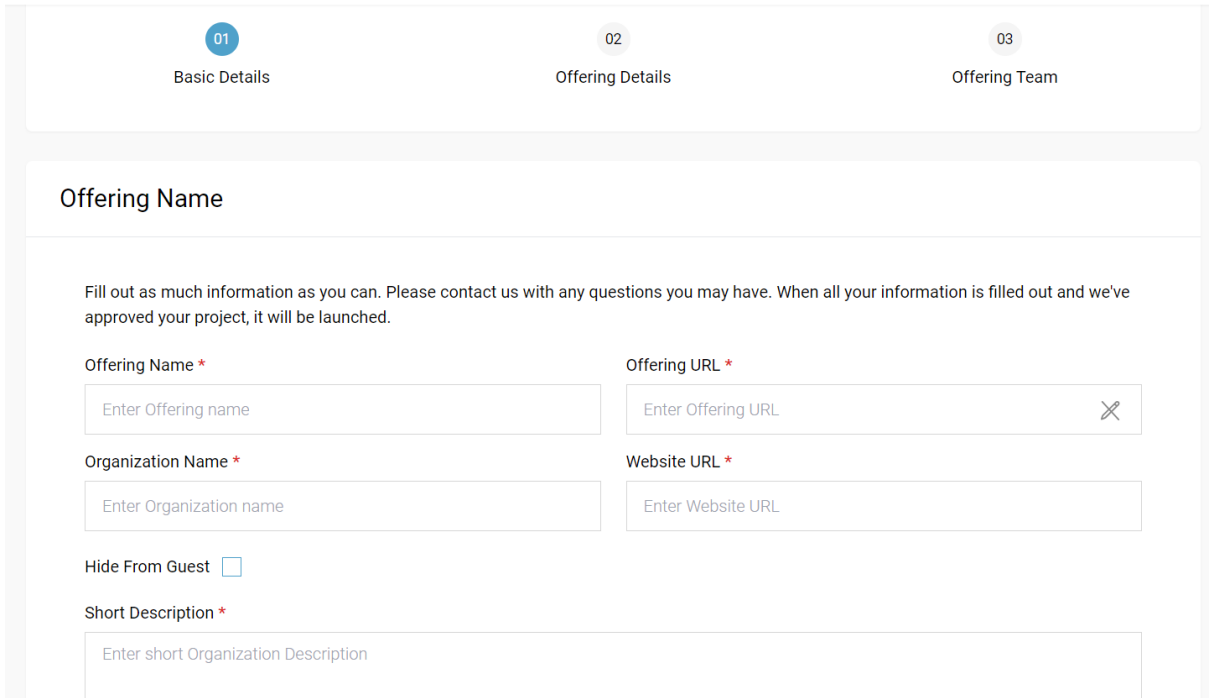
3. After completing the registration form, you will receive an email requesting account verification. Please complete this step to gain access to your account.

## Setting Up a New Offering

Once you have access to your account and are ready to set up a new product offering, navigate to the Offerings tab in your dashboard and click "Create Offering" to start.



You will be guided through a form to provide details about your offering, starting with the first section "Basic Details":

The image shows a multi-step form for creating an offering. At the top, there are three steps: '01 Basic Details', '02 Offering Details', and '03 Offering Team'. The 'Basic Details' section is active. It contains a heading 'Offering Name' and a paragraph: 'Fill out as much information as you can. Please contact us with any questions you may have. When all your information is filled out and we've approved your project, it will be launched.' Below this are several input fields: 'Offering Name \*' (text), 'Offering URL \*' (text with a clear icon), 'Organization Name \*' (text), 'Website URL \*' (text), a 'Hide From Guest' checkbox, and 'Short Description \*' (text).

01	02	03
Basic Details	Offering Details	Offering Team

**Offering Name**

Fill out as much information as you can. Please contact us with any questions you may have. When all your information is filled out and we've approved your project, it will be launched.

Offering Name \*

Offering URL \*

Organization Name \*

Website URL \*

Hide From Guest

Short Description \*

Note: the "Offering URL" refers to the publicly-visible link on the Impact Index, which you can customize here. For example, if you enter "ABC Bond" in the Offering URL field, your offering listing will be created with the URL: [impactindex.svx.ca/offerings/abc-bond](https://impactindex.svx.ca/offerings/abc-bond)

## Offering Type

Asset Class *	Product Type *	Organization Structure * ⓘ	
Asset Class	Product Type	Organization Structure	
Industry Sector *	Industry Sector		
Impact Theme *	Select Impact Theme		
Sustainable Development Goals (SDGs) *	Sustainable Development Goals (SDGs)		
Partners	Partners		
Capital Raise Target	Target Return	Term	Minimum Investment *
Enter Capital Raise Target \$	Enter Target Return %	Term	Enter Minimum Investment \$
Close Date	Assign to Issuer	Label	Tag
yyyy-mm-dd	Assign to Issuer	Label	Tag

Below the basic details section, there's a dedicated area for notes visible only to you and the SVX Team. Use this space to leave messages for the SVX Team or include links to documents from your deal room if submitting a new product for the Index+ selection process.

### Notes

Please provide a link to your deal room or offering documents here for the SVX Team to access and review.

Notes ⓘ

Enter Notes





While your offering is active, you can use the notes button to add

The screenshot shows the 'Offerings Management' interface. On the left is a navigation menu with 'Offerings' selected. The main area contains a table of offerings and a '+ Create Offering' button. The table has columns for Name, Product Type, Close Date, Status, and Action. One offering is listed: 'Housing Forever Bond - Series C Dev' with status 'Active'. In the 'Action' column, there are links for 'Preview | Re Draft' and 'Notes', with the 'Notes' link highlighted by a red box.



Name	Product Type	Close Date	Status	Action
Housing Forever Bond - Series C Dev	Bond or Debentures	December 31, 2024	Active	Preview   Re Draft <b>Notes</b>

Once completed, you can fill out additional details about your offering in the overview section, such as a company description, investment overview, impact overview (e.g., standards, metrics, and SDGs), and any images that showcase your organization or impact. Please look at other offerings on the platform as a guide for formatting.

Overview \*

Normal + B I U    

Additional Information

Normal + B I U    

Offering Location

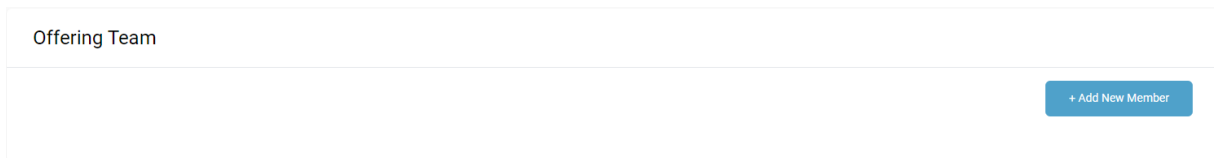
Headquarters \*

Impact Location \*

Update Images

Drag & Drop your files or Browse

In the final section, please include any team members you wish to be displayed with your offering.

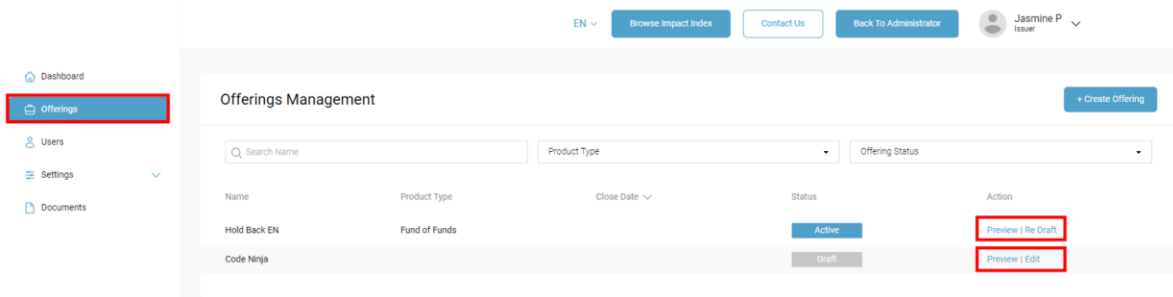


During this process, you have the option to save the offering as a draft and edit it as needed, before you officially submit the offering to the SVX team for review and approval.

### Editing Existing Offering

If you wish to edit an existing offering on the SVX Impact Index, you can easily do so through your account.

To make edits, navigate to the offerings section in your dashboard and select the option to re-draft the offering.



Please note that any edits to an active offering on the SVX Impact Index will require re-submission for review and approval by the SVX team. While in re-draft mode, the previous version will remain active until the updated offering is approved and updated.

If you have any other further questions, please do not hesitate to contact us at [platformsupport@svx.ca](mailto:platformsupport@svx.ca).

Thank You!