**Checklist for Banks: Portfolio Shift – Gender Analysis**

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| **Does your bank assess gender-related risks and opportunities within its portfolio?** |
| Yes, via a high-level assessment of potential risks and opportunities based on the sector makeup of the portfolio |  |
| Yes, via collecting and analysing gender-related data from clients as part of screening and due diligence processes. This might be collected alongside other sustainability data, such as CO2 emissions. |  |
| Other approach – please specify:  |  |
| None of the above  |  |
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| **Which categories does your bank consider in its assessment of gender-related risks and opportunities?***A bank may review these at the sector level or the company level, depending on the answer above.* |
| Representation, participation and leadership: proportion of women at all levels of seniority; barriers that prevent women from participating and/or advancing. |  |
| Compensation: Gender pay gaps  |  |
| Occupational segregation: the representation of different gender across different types of roles. |  |
| Workplace health and safety and discrimination: the prevalence of gender-based discrimination, harassment, violence and/or other safety and security concerns; occupational safety standards and their impact on women’s participation. |  |
| Products and services: whether products and services are designed and delivered in a gender-responsive way; the impact of products and services for women, including risks (e.g. healthy and safety risks) and opportunities (e.g. time-saving technologies to reduce demands on women’s time);  |  |
| Access to resources and opportunities: women’s access to essential resources such as training, technology and financial services and how these influence women’s equal participation and/or ability to benefit from a sector |  |
| Policy environment: Policies, regulations and initiatives that are relevant to gender equality in the sector. |  |
| Supply chain: Gender-related risks and opportunities (using the same categories above) that may exist in the sector’s/company’s supply chain. |  |
| Other – please specify: |  |
| None of the above. |  |
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| **Does your bank collect any gender-related data on its corporate and business clients?** |
| Whether or not the company has a gender equality commitment |  |
| Whether or not they have a Gender Equality Strategy or Action Plan |  |
| Data on gender balance in ownership |  |
| Data on gender balance in leadership |  |
| Data on gender balance in management |  |
| Data on gender balance in workforce |  |
| Data on the gender pay gap in the company |  |
| Whether or not they have a confidential, anonymous grievance, resolution, reporting and non-retaliation mechanism and procedure implemented to address and respond to incidents of violence and harassment |  |
| Whether or not they have a paid Maternity Leave Policy in place |  |
| Whether or not they provide products or services that enhance the well-being of women/girls and/or drive gender equality |  |
| Whether or not they monitor gender-related risks and opportunities specific to their sector of operation |  |
| Other – list:  |  |
| None of the above  |  |
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| **Does your bank engage with corporate and business clients on gender-related risks and opportunities?** |
| Yes, via general awareness raising efforts (e.g. education campaigns) |  |
| Yes, via one-to-one engagement (e.g. client meetings, workshops, dedicated support plans) |  |
| Yes, via tailored structured financing solutions for corporate clients |  |
| Yes, via targeted offerings for business clients  |  |
| Other – please specify:  |  |
| No  |  |
|  |  |
| **Does your bank monitor and track the number or proportion of its corporate and/or business client portfolio that meets certain gender-related criteria, such as those listed below:** |
| Company is committed to advancing gender equality, established via: * A public gender equality commitment (for example being a WEPs signatory; public targets reported to the Board);
* A Gender Equality Strategy or Action Plan in line with WEPs guidance;
* A paid Parental Leave Policy in place;
* A confidential, anonymous grievance, resolution, reporting and non-retaliation mechanism and procedure implemented to address and respond to incidents of violence and harassment.

In addition, the company may have a clear commitment to gender-responsive procurement and supplier diversity and engagement with women-owned businesses in its supply chain. |  |
| Company meets gender balance thresholds in its workforce, management and/or leadership, established via: * The company meeting the 2X Criteria’s gender balance thresholds for Entrepreneurship/Ownership, Leadership (including Management) and/or Employment.[[1]](#footnote-2)
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| Company is providing products and services that enhance the well-being of women/girls and/or drive gender equality, established via: * The company meeting the 2X Criteria for "products and services"[[2]](#footnote-3)
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| Other – please specify:  |  |
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| **Does the bank apply gender lens criteria (e.g. 2X criteria) to its investment portfolio(s)?** |  |
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| **Has your bank ever issued a gender bond?** |  |
| **If ‘yes’, for what purpose(s) has your bank used the proceeds from the gender bond(s) issued?** |  |
| Projects to improve the gender inclusivity of a bank's leadership and workplace, for example specific training efforts to improve the women leadership pipeline, or building improvements that create a safer workplace for women. |  |
| Financing corporate lending portfolio to companies that meet key gender equality criteria |  |
| Financing credit lines for women and/or women-owned micro, small, and medium-sized enterprises |  |
| Capacity building programs or services to suppliers to support continuous improvement on gender equality and women's empowerment |  |
| Engagement and/or programs focusing on engagement with community-led organisations that are working on gender equality and women's empowerment |  |
| Other - please specify: |  |
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| **Is your bank pursuing an integrated approach to gender and climate change impact objectives? *(Assess via responses to the questions below)*** |
| Does your bank undertake climate risk assessments?  |  |
| If yes, have gender considerations been integrated within these? |  |
| Does your bank undertake nature risk assessments?  |  |
| If yes, have gender considerations been integrated within these? |  |
| Has your bank established a climate transition plan? |  |
| If yes, does this include financed emissions? |  |
| If yes to one or both of the questions above, does the plan have gender considerations integrated? |  |
| Is your bank on track against its emission reductions targets? |  |
| If yes - are these reduction targets being met in line with the gender components of the climate transition plan? (If applicable)  |  |

1. 2X Global. 2024. [2X Criteria Reference Guide](https://www.2xchallenge.org/2x-criteria-reference-guide) [↑](#footnote-ref-2)
2. 2X Global. 2024. [2X Criteria Reference Guide](https://www.2xchallenge.org/2x-criteria-reference-guide) [↑](#footnote-ref-3)