

Sustainability for banking and finance

A practical framework for banks and financial service organizations to reduce risk, improve efficiency, and accelerate net-zero progress.

April 2024





TABLE OF CONTENTS

Mantis & Banking	03
Case Study: Large Regional Bank	05
Case Study: Top 10 US Retail Bank	06
Our Experience	07
Sustainability	08

About Mantis

At Mantis Innovation, unlocking efficiencies is our driving force. We specialize in energy efficiency, energy procurement, and facilities management solutions. Our tailored strategies help you optimize operations, minimize costs, streamline processes, and elevate performance. Our expertise allows us to thoroughly assess your facility operations, identify areas for improvement, and craft long-term strategies for sustainable success. By enhancing energy management and implementing effective practices, we help you navigate budgetary risks and improve operational planning. Together, we ensure your organization operates at its peak potential while setting new standards of excellence in your industry.

mantisinnovation.com



Mantis & Banking

Mantis has been partnering with banking and financial services organizations for more than a decade and currently works with 3 of the 10 largest financial institutions in the U.S. These firms are increasingly seeking opportunities to manage operating risks, protect their reputation, and meet evolving customer demands. Sustainability initiatives present a significant opportunity to improve key metrics across risk management, operational efficiency, employee performance, innovation and technology, and customer experience.

Critical Considerations for Financial Institutions:

- How can we align our capital improvements to meet the demands of our evolving brick-and-mortar portfolio? In particular, the deferred liability of maintaining aging facilities, and the impact of system failures on employee performance and customer satisfaction?
- What sustainability investments can we identify to maximize value? Moreover, what sustainability investments within and across our facilities will align corporate real estate with a corporate ESG strategy and program?
- How do we meet the evolving and new expectations of our lending customers for sustainability expertise and performance? What technology will position us favorably within the energy transition, meeting stakeholders' expectations for innovation and climate-forward technology adoption?
- How do we mitigate risk in an ever-changing energy landscape? Are there tech-enabled solutions to help manage our facilities portfolio?

A Future-Focused, Results-Driven Partner

Rising to these challenges requires a future-focused, results-driven, and consultative partner that can help banks and financial service organizations understand, benchmark, and manage their entire facility footprint both in terms of physical assets as well as energy use and sustainability planning and implementation.





Our Approach

Budget Optimization

01

We help you optimize budgets for a variety of factors, including sustainability and your priority initiatives.

Ease & Simplicity

02

Whether you're already on the road to net-zero or just starting your journey, we help you reach your net-zero goals faster, better, and more cost-effectively.

Impact

03

With our holistic approach and multidisciplinary expertise, we see interconnections that others don't, allowing us to identify the most-effective strategies en route to reaching net-zero.

Future-Proof

04

We keep you one step ahead of a fast-moving landscape of built environment regulations—both at the local and state level—as well as financial disclosure requirements such as the proposed SEC climate risk reporting.

De-Risked

05

Unlike many firms, our net-zero services include a focus on identifying and mitigating climate risk, which is becoming increasingly important for real estate portfolio owners and facility managers.

Our Belief

At Mantis, we firmly believe that a data-driven, comprehensive approach to sustainability, energy, and facilities management is prudent for organizations looking to mitigate risk, improve operational efficiencies, and align with larger corporate responsibility goals and stakeholder expectations.

Large Financial Institution: Identifying Roof Restorations Over Replacements to **Avoid Cost and Optimize Budget**

CHALLENGE

This financial institution with a retail presence in over 25 large U.S. markets and C&I banking nationwide was presented with a 10-year, \$135M (in 2019 dollars) roof capital project list by its previous roof consultant who happened to also be a roofing contractor.

SOLUTION MIX

Mantis Innovation collaborated with the client to identify around 300 priority sites that held the greatest opportunity for cost avoidance and visually re-assess their roofs based on three key factors:

- Roof Condition
- Leak History and Cost
- Expected Capital Project Cost

RESULTS

With 302 sites assessed, a significant portion of the roofs slated for replacement could be restored for a fraction of that cost—one-third the amount in some cases—with minimal impact on the estimated remaining service life. This will allow the client to execute many more roofing projects with their limited budget than originally thought.

\$43M

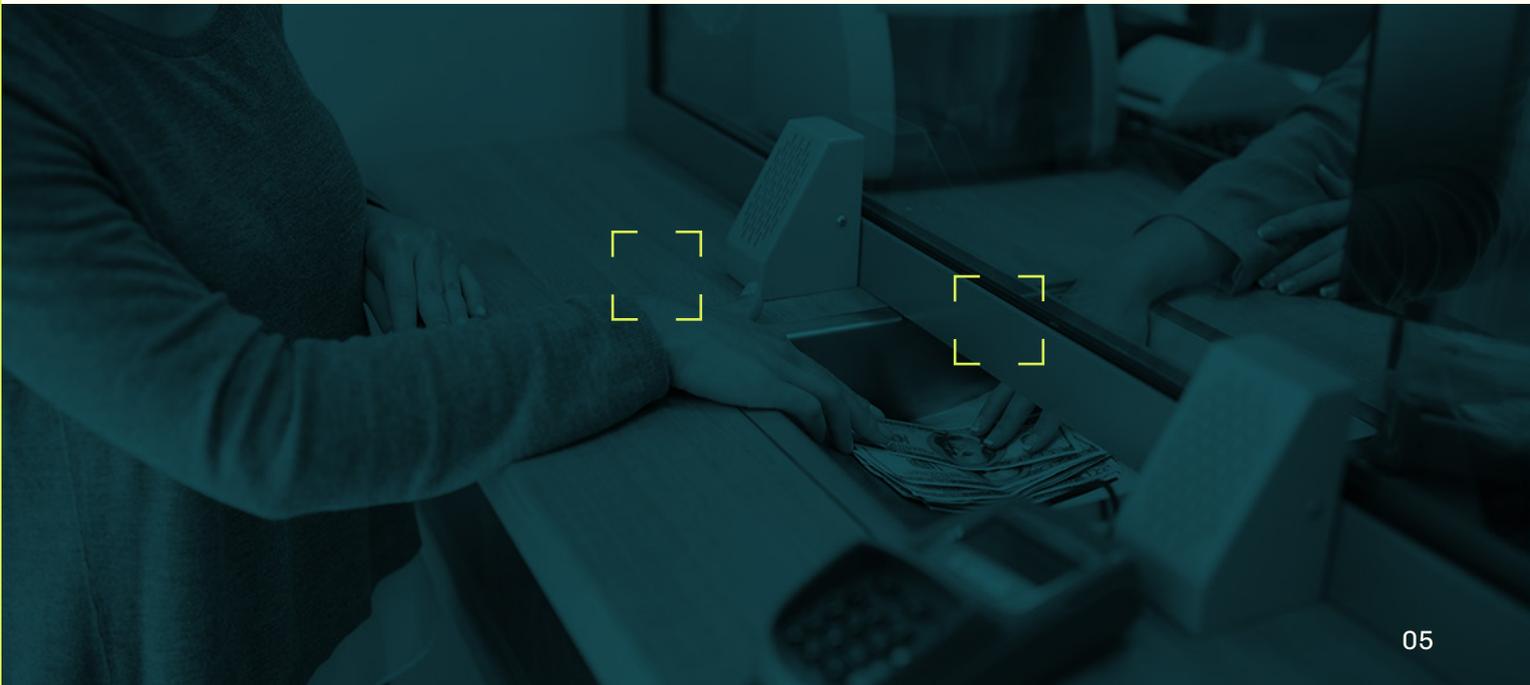
10-YEAR COST
AVOIDANCE

64

RESTORATIONS
UNCOVERED

82

REPLACEMENTS
ORIGINALLY
FORECASTED



Top 5 Retail Bank: Significant reduction in actual vs forecasted repair costs via value engineering

CHALLENGE

Uncover opportunities to improve roof performance on a massive portfolio with a limited budget while executing planned annual maintenance.

SOLUTION MIX

Engaging full, turnkey asset management, collaborating on appropriate annual capital budgeting, leveraging buying power to ensure the best value on materials and labor, streamlining specifications in lieu of full design, value engineering, bundling capital and repair projects geographically, and buying the work at the right time to ensure the best value on labor.

RESULTS

Roofing expenditures have been significantly reduced at the time of buying repair and restoration work from the original forecast, creating flexibility in their facilities budget and empowering the client to begin a similar program for their pavement and HVAC assets, as well as adding Leak Response.

2,500

BRANCHES

\$5-7M

ANNUAL ROOFING
BUDGET

\$2-3M

ANNUAL PAVEMENT
BUDGET

8%

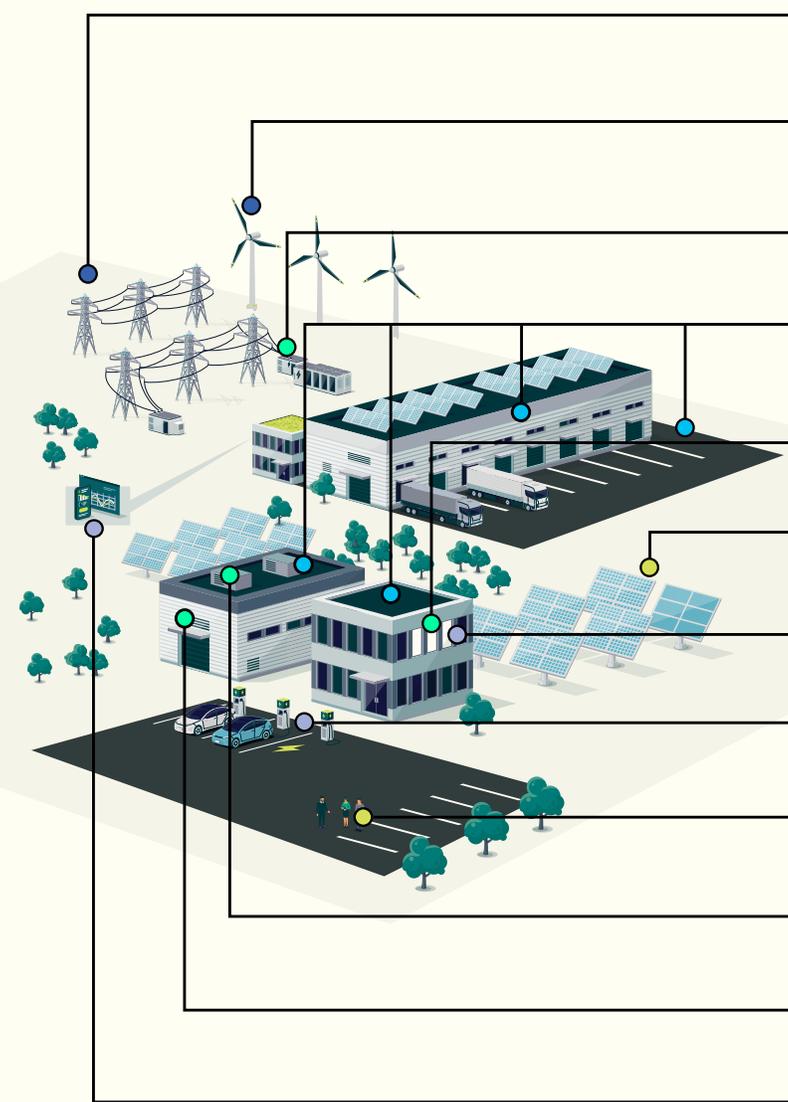
REDUCTION IN
FORECASTED
REPAIR COSTS VS.
ACTUAL



Our Expertise

Mantis Innovation delivers sustainable building performance through consulting, program management, and project delivery. We bridge gaps between building systems and across portfolios to optimize budgets and manage risk.

Our consultants and analysts show you the most cost-effective path to reducing carbon emissions and managing both financial and climate risk across your portfolio. Our program managers create an implementation plan that makes the most of your available budgets over time. Our energy procurement, project management, and field staff ensure successful project delivery as your unique plan becomes reality.



Electricity & Natural Gas Procurement

Our Energy Procurement Solutions help businesses secure the best energy rates and integrate renewables through strategic planning and custom solutions.

Green Energy Procurement

We provide green energy procurement solutions to help businesses reduce their carbon footprint and support clean energy infrastructure.

Demand Response

We help large energy consumers reduce usage, lower costs, and improve resiliency during energy shortages and high demand.

Roof, Pavement, Envelope, and HVAC Asset Management

We capture data on your most expensive facility assets, then we accurately forecast future repair and replacement needs by leveraging predictive analytics and billions of square feet of historical data.

Lighting & Controls

Execute LED lighting fixture and/or lamp retrofits or replacements and implement advanced lighting control strategies.

Solar

Develop and manage your entire solar power project, including direct purchase, community solar, brownfield development, and on-site solar.

Utility Bill Management

Software that automates data processing, validates invoices, and provides real-time insights, reducing errors and improving workflows.

EV Charging

Turnkey charging solutions from assessment to delivery that can modernize your facilities or drastically improve dwell time at retail locations.

Sustainability Consulting

We use a data-driven approach to create actionable plans, benchmark performance, reduce energy usage, and enhance brand appeal.

HVAC/Mechanical Optimization

We specialize in energy-efficient HVAC upgrades and retrofits, reducing energy use and carbon emissions with efficient boiler replacements.

Airflow Optimization & Containment Solutions

Our airflow experts can ensure proper temperature control to optimize operations.

Building Automation & Controls

Our Building Automation Solutions enhance facility performance with custom, turnkey integrations for HVAC, mechanical, security, and lighting.

Sustainability Overview

We're focused on outcomes

Whether you're already on the road to net-zero or just starting your journey, we make it easier and more budget-effective to set and achieve your climate goals.

>100,000 MT CO₂e

ANNUAL NEW GHG
REDUCTIONS

10-30%

AVG ENERGY SAVINGS
FROM COST-EFFECTIVE
EFFICIENCY RETROFITS

300+ MW

INSTALLED SOLAR

Our consultants, with both strategic and technical expertise, can balance your budget with your goals to show you the most cost-effective path to reducing carbon emissions, and managing climate risk across your real estate and lending portfolio. We guide clients from where they currently stand, to where they need to be on their journey to decarbonization, delivering significant economic and competitive advantages.

A comprehensive sustainability program will solve multiple, evolving core business challenges, including:

We can get you there

- Reputation and reporting
- Reliable and resilient facilities
- Regulatory compliance
- Tax incentives and rebates
- Procurement strategies
- Finance and capital allocation

Across 1B+ sq ft, Mantis delivers 20-30% savings on critical facility spend while reducing carbon emissions

Cutting emissions shouldn't represent a cost center for your business. That's why we help you maximize efforts and optimize budgets, by prioritizing low- and no-cost measures first. The result: net-zero strategies with a near-zero incremental expense, allowing you to reallocate budget toward other priority initiatives.

Our solutions include

- ✓ Planning portfolio-level energy management; including monitoring, analytics, and controls
- ✓ Performing assessments, including to comply with local building performance policies
- ✓ Building strategic roadmaps
- ✓ Supporting the allocation of capital, either from internal or external sources
- ✓ Planning and execution of renewable energy and carbon credits procurement
- ✓ Reporting ESG data; simplifying and automating data collection and organization



▼ Contact

877.459.4728
www.mantisinnovation.com
info@mantisinnovation.com

▼ Headquarters

10375 Richmond Avenue
Suite 700
Houston, Texas 77042

Stay Connected

in [linkedin.com/company/mantis-innovation](https://www.linkedin.com/company/mantis-innovation)

f [facebook.com/MantisInnov](https://www.facebook.com/MantisInnov)

@ [instagram.com/mantisinnovation](https://www.instagram.com/mantisinnovation)

X twitter.com/MantisInnov

Offices

6312 S Fiddlers Green Cir #420
Greenwood Village, CO 80111

4322 N Beltline Rd Suite B110
Irving, TX 75038

200 Summit Drive, Suite 320
Burlington, MA 01803

717 Franklin Ave #100
Waco, TX 76701

475 N Martingale Rd, Suite 860
Schaumburg, IL 60173

344 Cleveland Ave, Suite G
Tumwater, WA 98501

191 Edgemoor Rd
Edgemoor, DE 19809

300 SE 2nd Street, Suite 600
Ft Lauderdale, FL 33301