

## CASE STUDY: WEALTH MANAGER

# To elevate and differentiate your product



### OPPORTUNITY

A U.S.-based online financial advisor was looking to differentiate its product offering to help win Millennial market share in the crowded, robo-advisor space.



### SOLUTION

We integrated our ESG indexes and ESG Ratings into a simplified scoring solution that retail investors would understand and find easy to use.



### OUTCOME

The simplified ratings system enabled their investors to make investment decisions that aligned with their values and also aligned with the user experience of our client's online investing platform.

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 **Powering better investment decisions.**