

MSCI ESG Catholic Values Services and Solutions

MSCI ESG Research provides comprehensive services and solutions for investors looking to comply with faith-based investment guidelines including the US Conference of Catholic Bishops (USCCB). MSCI ESG Research's core Catholic Values screening service is fully customizable and supports pre- and post-trade compliance.

Key Benefits

Catholic Issues Expertise

- » Over 40 years of experience working with faith-based investing community
- » Thorough knowledge of the USCCB guidelines as well as faith-based investing trends

Pre- and Post Trade Compliance Screening

- » Consultation with in-house MSCI ESG Research* Catholic Values screening issue specialists
- » MSCI ESG Catholic Values Screening Research accessible via our interactive online platform, MSCI ESG Manager, and also integrated within MSCI's BarraOne and Barra Portfolio Manager, Factset, and Style Research
- » Data feeds can be integrated into OMS, trading, compliance systems such as APL, Charles River, Latent-Zero, Sentinel, Advent-Moxy, ITG-MacGregor and Vestmark
- » MSCI ESG Portfolio Audit reports available for due diligence screening

Comprehensive Offering

- » Fully customizable issue and threshold selection to ensure accurate implementation of client mandates
- » Global coverage of all publicly traded equity companies
- » Extensive global fixed income coverage
- » Catholic Index solutions available

Client Service Excellence

- » Ongoing support by MSCI ESG client services team
- » Committed relationship management process
- » Backed by a dedicated ESG client service team
- » 24/5 client service



* MSCI ESG Research has a 26 year legacy based on ESG pioneers KLD, IRRG & Innovest

MSCI ESG Core Catholic Values Screening Service

- » A package of screens and research based on catholic faith-based investment guidelines including the US Conference of Catholic Bishops (USCCB) Socially Responsible Investment Guidelines
- » Developed in consultation with our clients
- » Fully customizable to help clients meet unique interpretations, goals, and portfolio constraints
- » Available for Pre- and Post-Trade compliance screening
- » Supported by MSCI ESG Research's Catholic Values Screening Issue Specialists and the MSCI ESG Global Client Service team

MSCI ESG Catholic Values Screening Research follows catholic faith-based investment guidelines along with the USCCB Investment Guidelines, mapped below

Issue	USCCB Policy	MSCI USCCB Exclusion Package	MSCI USCCB Supplemental Package	MSCI Custom ESG Research Only
Abortion*	Exclusion Support Relevant Shareholder Resolutions and Engagement	✓	✓	
Contraceptives*	Exclusion	✓		
Embryonic Stem Cell/Human Cloning*	Exclusion	✓		
Human Rights**	Support Relevant Shareholder Resolutions and Engagement		✓	
Racial and Gender Discrimination**	Exclusion	✓		
Access to Pharmaceuticals	Support Relevant Shareholder Resolutions and Engagement			✓
Curbing Pornography*	Exclusion	✓		
Reducing Arms Production*	Exclusion	✓		
Antipersonnel Landmines*	Exclusion	✓		
Labor Standards/ Sweatshops**	Support Relevant Shareholder Resolutions and Engagement		✓	
Affordable Housing/ Banking***	Exclusion	✓		
Protecting the Environment**	Support Relevant Shareholder Resolutions and Engagement		✓	
Encouraging Corporate Responsibility	Support Relevant Shareholder Resolutions and Engagement			✓

* Coverage universe encompasses Global Publicly traded equities plus Corporate and Corporate-like issuers for Barclays Aggregate

** Available for the MSCI ESG Impact Monitor coverage universe, which comprises the following as of June 2014: MSCI World Index, MSCI Emerging Markets Index, MSCI US Investable Market Index (IMI), Top 275 companies in the MSCI UK IMI (identified at the beginning of each year), MSCI Australia 200, MSCI South Africa IMI, MSCI Canada IMI, 90% of the Barclays Global Aggregate Corporate Index by market value.

*** Available for financial institutions that have received a rating of "Needs to Improve" or "Substantial Non-Compliance" under the U.S. Community Reinvestment Act within the last three years.

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About MSCI ESG Research

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