

MSCI ESG Portfolio Analytics

MSCI ESG Portfolio Analytics provides multi-dimensional risk assessments at the portfolio level allowing asset owners, managers and consultants to measure environmental, social and governance (ESG) exposure of portfolios relative to index benchmarks.

Key Features and Benefits

Analyze portfolio ESG risk: MSCI ESG Portfolio Analytics is a unique tool for assessing the ESG characteristics and risk profile of portfolios. The reports provide an objective, standardized framework for understanding portfolio ESG risk and for tracking ESG performance over time.

Assess effectiveness of ESG integration: MSCI ESG Portfolio Analytics reports track improvements or deterioration in ESG performance by comparing portfolio ESG risk characteristics to the characteristics of other portfolios and to benchmarks and can facilitate the successful integration of ESG factors.

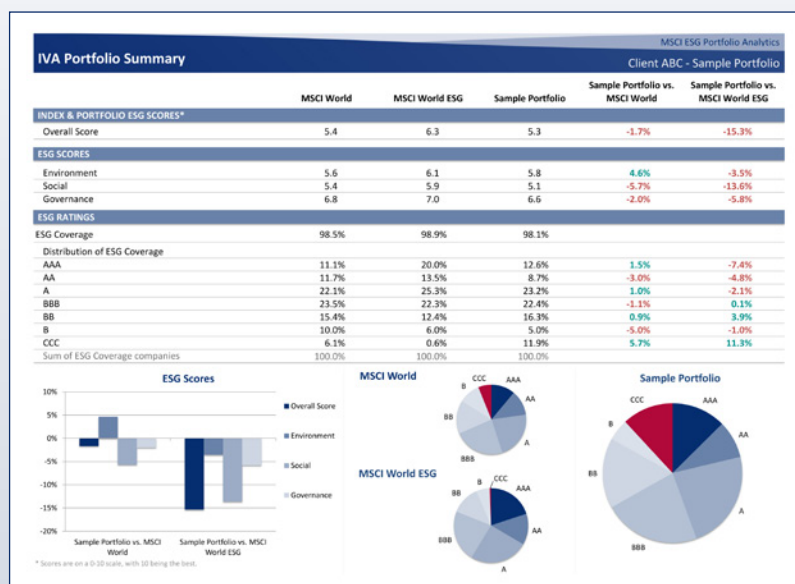
Benchmark ESG performance: The MSCI ESG Portfolio Analytics reports benchmark the ESG characteristics of portfolios against MSCI's ESG and conventional indexes to identify portfolios with ESG risk scores that stand out in comparison to these benchmarks.

Analyze ESG metrics at every level: The MSCI ESG Portfolio Analytics reports provide clients with a holistic view of the ESG profile of a portfolio, measuring key ESG statistics at the portfolio, sector, issue, and company level.

Meet ESG reporting requirements: The reports present data in a clear and consistent format that can be used in supporting ESG reporting requirements, internally and externally, including those of the Principles for Responsible Investment (PRI).

Understand ESG risk from multiple dimensions: The MSCI ESG Portfolio Analytics reports identify ESG-driven investment risks or opportunities that may not be captured by conventional financial analysis. These reports also identify companies that may result in reputational risks from their involvement in ESG controversies and that may violate client mandates due to involvement in business activities subject to investment restrictions.

MSCI ESG Portfolio Analytics offers data-driven analysis of a portfolio's ESG characteristics:



Product Overview

MSCI ESG Portfolio Analytics reports are a useful tool for asset owners and managers.

Asset Owners can use the reports to:

- » Inform manager selection and monitoring
- » Evaluate how managers address ESG risks
- » Satisfy reporting needs: for constituents, board-level reviews, internal purposes, or for reporting on implementation of the PRI
- » Conduct internal ESG risk assessment
- » Identify targets for company engagement

Asset Managers can use the reports to:

- » Satisfy reporting needs: for RFPs as evidence of ESG integration, for clients, or for reporting on implementation of the PRI
- » Evaluate ESG risk exposure in portfolio construction
- » Assess ESG integration efforts and benchmark ESG performance
- » Identify targets for company engagement

Key product features include:

- » Portfolio and index ESG scores – leveraging MSCI ESG Intangible Value Assessment (IVA) ratings, which analyze ESG risks and opportunities; MSCI ESG Portfolio Analytics reports include overall ESG scores, individual Environment, Social and Governance scores, sector scores, key MSCI ESG IVA issue scores, and distributions by MSCI ESG IVA ratings band
- » Portfolio holdings breakdown by ESG scores – including the lowest and highest rated portfolio positions, and ratings of largest positions in the portfolio
- » Analysis of ESG impact and controversy exposure – utilizing MSCI ESG Impact Monitor, MSCI ESG Portfolio Analytics reports identify positions with major controversy exposure
- » Analysis of controversial business involvement exposure – drawing on MSCI ESG Business Involvement Screening Research, MSCI ESG Portfolio Analytics reports identify positions with controversial involvement exposure
- » Coverage across MSCI's product range - MSCI ESG Portfolio Analytics will soon be made available through MSCI's BarraOne and Barra Portfolio Manager platforms

MSCI ESG Research – Products at a Glance:

MSCI ESG Manager				MSCI ESG Portfolio Analytics
MSCI ESG Intangible Value Assessment	MSCI ESG Impact Monitor	MSCI ESG Business Involvement Screening Research	MSCI ESG Government Ratings	

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About MSCI ESG Research

MSCI ESG Research products and services are designed to provide in-depth research, ratings and analysis of environmental, social and governance-related business practices to companies worldwide. ESG ratings, data and analysis from MSCI ESG Research are also used in the construction of the MSCI ESG Indexes. MSCI ESG Research is produced by MSCI's indirect wholly-owned subsidiary MSCI ESG Research Inc., a Registered Investment Adviser under the Investment Advisers Act of 1940.

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