Institutional Client-Designed Indexes

Evolving Client-Driven Index Solutions for Asset Owners

The World is Changing. So Are Investment Strategies.

For pension funds, endowments and other institutional owners of assets, changes in market structure, the low-carbon transition, stakeholder pressures, and regulatory, geopolitical and technological developments can have a significant impact on risk and return.

As their investment strategies evolve, asset owners may desire to evolve their index solutions too, and they may need data and insights to help them understand the effect of their potential modifications.
MSCI Institutional Client-Designed Indexes

Our Institutional Client-Designed Indexes (iCDIs) enable asset owners to evolve their design over time to remain suitable to their investment strategy. As you adapt your strategy in response to new insights and challenges, you can adapt your index too by adjusting its methodology accordingly. iCDIs aim to eliminate or reduce the need to switch indexes following a shift in strategy, thereby enhancing flexibility while helping you to cut costs, reduce risk and ease administrative burdens.

- **An index solution built for your strategy**
  iCDIs enable you to translate your investment requirements into index criteria. MSCI researchers and index solutions specialists are available to provide support as you develop factor, thematic or ESG and climate index methodologies for your tailored equity index based on your specific investment objectives, constraints and preferences.

- **Supported by the depth of MSCI’s index data**
  iCDIs leverage MSCI’s more than 50 years of leadership and expertise in index construction, maintenance and data to deliver investable, transparent and replicable custom indexes that you can design to meet your passive investment mandates, either internally or externally managed.

- **Insight to drive actions**
  Monitoring, insights and scenario analysis can help you pinpoint drivers of risk and performance and adjust the methodology of your index as needed for its continuous suitability for your investment strategy.

**Take control of your index**

- Investable, transparent and replicable custom indexes designed by you utilizing the rigor and highest standards for precision that characterize MSCI indexes
- Ongoing support from dedicated MSCI Solutions Research teams
- Reporting and insights to help you analyze the current characteristics of your iCDI and assess the potential need for change
- Institutional-grade reporting to help you share progress with stakeholders across your organization.
MSCI is a leading provider of critical decision support tools and services for the global investment community. With over 50 years of expertise in research, data and technology, we power better investment decisions by enabling clients to understand and analyze key drivers of risk and return and confidently build more effective portfolios. We create industry-leading research-enhanced solutions that clients use to gain insight into and improve transparency across the investment process.

To learn more, please visit www.msci.com.

About MSCI Inc.

MSCI is a leading provider of critical decision support tools and services for the global investment community. With over 50 years of expertise in research, data and technology, we power better investment decisions by enabling clients to understand and analyze key drivers of risk and return and confidently build more effective portfolios. We create industry-leading research-enhanced solutions that clients use to gain insight into and improve transparency across the investment process.

To learn more, please visit www.msci.com.

The information contained herein (the “Information”) may not be reproduced or disseminated in whole or in part without prior written permission from MSCI. The Information may not be used to verify or correct other data, to create indexes, risk models, or analytics, or in connection with issuing, offering, sponsoring, managing or marketing any securities, portfolios, financial products or other investment vehicles. Historical data and analysis should not be taken as an indication or guarantee of any future performance, analysis, forecast or prediction. None of the Information or MSCI index or other product or service constitutes an offer to buy or sell, or a promotion or recommendation of, any security, financial instrument or product or trading strategy. Further, none of the Information or any MSCI index is intended to constitute investment advice or a recommendation to make (or refrain from making) any kind of investment decision and may not be relied on as such. The Information is provided “as is” and the user of the Information assumes the entire risk of any use it may make or permit to be made of the Information. NONE OF MSCI INC. OR ANY OF ITS SUBSIDIARIES OR ITS OR THEIR DIRECT OR INDIRECT SUPPLIERS OR ANY THIRD PARTY INVOLVED IN THE MAKING OR COMPILING OF THE INFORMATION (EACH, AN “MSCI PARTY”) MAKES ANY WARRANTIES OR REPRESENTATIONS AND, TO THE MAXIMUM EXTENT PERMITTED BY LAW, EACH MSCI PARTY HEREBY EXPRESSLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. WITHOUT LIMITING ANY OF THE FOREGOING AND TO THE MAXIMUM EXTENT PERMITTED BY LAW, IN NO EVENT SHALL ANY OF THE MSCI PARTIES HAVE ANY LIABILITY REGARDING ANY OF THE INFORMATION FOR ANY DIRECT, INDIRECT, SPECIAL, PUNITIVE, CONSEQUENTIAL (INCLUDING LOST PROFITS) OR ANY OTHER DAMAGES EVEN IF NOTIFIED OF THE POSSIBILITY OF SUCH DAMAGES. The foregoing shall not exclude or limit any liability that may not by applicable law be excluded or limited.

©2022 MSCI Inc. All rights reserved | CFS1022