

MSCI ESG Fund Metrics Launches on Leading Market Data Platforms

Growing demand for ESG transparency driving adoption of MSCI ESG Quality Score, values and risk metrics

New York – October 24, 2017 – MSCI Inc. (NYSE: MSCI), a leading provider of research-based indexes and analytics, announced today that [MSCI ESG Fund Metrics](#), provided by MSCI ESG Research LLC, is now available on 10 market data platforms globally in a move to help financial advisors and wealth managers provide their clients with environmental, social and governance (ESG) portfolio transparency.

The interest in ESG impact from high-net-worth and ultra-high-net-worth investors continues to grow year over year across generations, with millennials at the forefront.¹ A total of 76% of millennials reported reviewing their portfolio assets based on ESG impact – up from 73% in 2016 and 40% in 2015 – yet just 18% said they discussed these investments with their financial advisor.

MSCI ESG Fund Metrics aims to provide insight into the overall ESG quality of mutual fund and exchanged-traded fund (ETFs) holdings. The scores and metrics are derived from [MSCI ESG Ratings](#), which measures the ability of companies to manage medium- to long-term ESG risks and opportunities.

The MSCI ESG Quality Score covers more than 26,000 equity, fixed-income, and multi-asset class funds worldwide. Additional metrics including ESG Score Peer Rank, ESG Score Global Rank, Carbon Intensity, Sustainable Impact Exposure, and SRI Screening Criteria Exposure provide insight into how funds rank compared to peers and score on various environmental, social, political and values-based criteria.

MSCI ESG Fund Metrics scores can now be accessed on the following platforms:

1. Broadridge Global Market Intelligence
2. ETF.com
3. FactSet
4. Fundata.com
5. Fund Focus (Longboat Analytics part of MoneyMate Group)
6. MSCI Barra PortfolioManager (BPM) – *(expected in 2018)*
7. MSCI BarraOne *(expected in 2018)*
8. MSCI ESG Manager
9. SpainSIF
10. VDOS' quefondos.com

“The Millennial generation will soon represent one third of all adults in the U.S. This significant population has a keen interest in aligning their investments with their values,” said Eric Moen, Managing Director of MSCI ESG

¹ U.S Trust Insights on Wealth and Worth: 2017 The Generational Collide.
http://www.ustrust.com/publish/content/application/pdf/GWMOL/USTp_WW_FindingsOverview_Broch_Final.pdf

Research. “We are also seeing a growing demand for ESG information from our institutional clients and the financial advisor community, who require tools to interpret and report on the ESG characteristics of a portfolio. We are excited to introduce ESG Fund Metrics to more than 145,000 financial advisors through these leading global fund platforms.”

Dave Nadig, CEO of ETF.com, said, “Without a doubt, the number one question I get from advisors is how to handle the coming generational wealth transfer -- some \$30 trillion that will make its way from the baby boomers to millennials in the coming two decades. ESG has emerged as one of the dominant answers to that question. We’re extremely pleased to now offer MSCI ESG data at ETF.com.”

“Broadridge is delighted to add MSCI’s ESG factors to its Global Market Intelligence platform,” said Stephanie Clarke, senior vice president, Global Market Intelligence at Broadridge. “We are now able to bring MSCI ESG Research’s ESG expertise to our clients, providing another key layer of data and analytics, comparisons and ESG benchmarking across fund products.”

Janny Vincent, President and CEO of Fundata Canada, said, “There is growing demand in the Canadian investment market for more information around the sustainability profile of a portfolio. We are pleased to offer ESG Fund Metrics scores and metrics to our clients who want to look under the hood to better understand how a portfolio performs on ESG.”

Simon Fawsitt, Managing Director of Longboat Analytics, MoneyMate Group’s market analytics division, said, “With the integration of MSCI ESG Fund Metrics inside our Fund Focus platform, we are delighted to provide our financial advisor users with additional metrics to allow them to further analyze ESG investing for their clients.”

Enrique Velazquez, Managing Director and Partner at VDOS, said, “The combination of VDOS fund market experience and the leadership of MSCI ESG Research reinforces the involvement of both entities in providing transparent and detailed information on the ESG profile of funds registered in the Spanish market.”

Francisco Javier Garayoa, Director at SpainSIF, said, “SpainSIF is pleased to work with VDOS and MSCI ESG Research with the aim of providing investors with access to information on the funds product offering available in the market so they can further assess alignment with their ESG values and preferences. This information is available on the SRI funds platform of the Association.”

MSCI ESG Research has a dedicated, in-house team that assesses thousands of data points across 37 ESG key issues, covering more than 6,400 global companies (11,000 total issuers including subsidiaries) in more than 70 sectors. MSCI ESG Research works with 46 of the top 50 global asset managers and more than 1,000 clients globally.²

MSCI ESG Research led 13 out of 17 major categories, including “Best SRI Research” firm and “Best Corporate Governance” firm in the 2016 Independent Research in Responsible Investment (IRRI) survey.

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² According to latest P&I AUM data and MSCI clients as of June 2017

About MSCI

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Our line of products and services includes indexes, analytical models, data, real estate benchmarks and ESG research.

MSCI serves 97 of the top 100 largest money managers, according to the most recent P&I ranking.

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