

CASE STUDY: WEALTH MANAGER

Flexible technology elevates client offerings



OPPORTUNITY

An American multinational investment bank sought to change the outside perception of the firm to appeal to Millennials and to attract new assets by focusing on ESG investment strategies.



SOLUTION

We designed a simplified way for the client's retail clients and financial advisors to assess ESG company research and mutual funds holdings.



OUTCOME

Our flexible technology enabled the client to build a custom solution that would appeal to a younger generation of investors. Its "impact investing" program is gaining traction thanks to a user-friendly interface that adds environmental, social and governance scores from MSCI.

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 **Powering better investment decisions.**