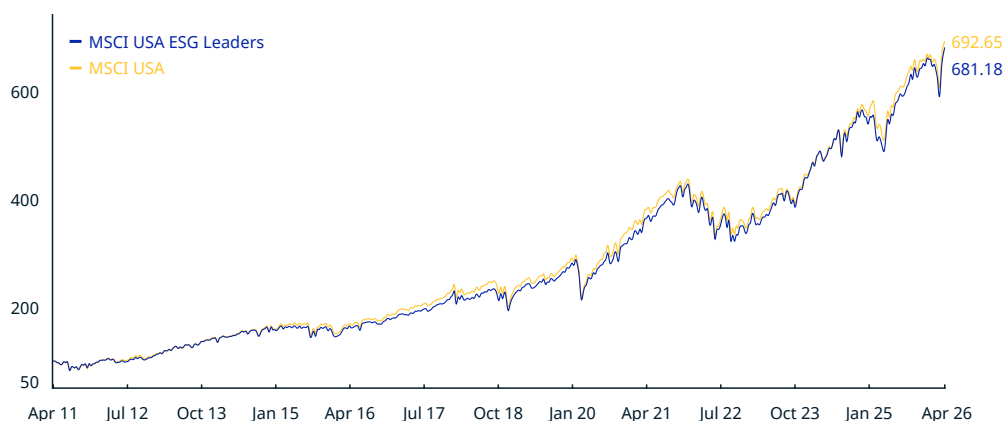


# MSCI USA ESG Leaders Index (USD)

The MSCI USA ESG Leaders Index is a free float-adjusted market capitalization-weighted index designed to represent the performance of companies that are selected from the MSCI USA Index ("Parent Index") based on Environmental, Social and Governance (ESG) criteria. These criteria exclude constituents based on involvement in specific business activities, as well as ESG ratings and exposure to Controversies. The Indexes are derived from the MSCI USA Index and aim to achieve sector weights that reflect the sector weights of the corresponding Parent Index. The MSCI USA ESG Leaders Index consists of Large and Mid cap companies in US markets. The Index construction targets 50% free float-adjusted market capitalization coverage of each Global Industry Classification Standard (GICS®) sector by selecting constituents primarily based on criteria including the ESG rating, the trend in that rating and the company's industry-adjusted ESG score.

For a complete description of the index methodology, please see [Index methodology - MSCI](#).

## CUMULATIVE INDEX PERFORMANCE – GROSS RETURNS (USD) (APR 2011 – APR 2026)



## ANNUAL PERFORMANCE (%)

Year	MSCI USA ESG Leaders	MSCI USA
2025	19.24	17.75
2024	23.59	25.08
2023	29.13	27.10
2022	-20.21	-19.46
2021	31.73	26.97
2020	18.84	21.37
2019	31.66	31.64
2018	-3.11	-4.50
2017	20.56	21.90
2016	11.74	11.61
2015	-1.33	1.32
2014	12.84	13.36
2013	33.54	32.61
2012	13.39	16.13

## INDEX PERFORMANCE – GROSS RETURNS (%) (APR 30, 2026)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since Dec 29, 2000
					3 Yr	5 Yr	10 Yr		
MSCI USA ESG Leaders	11.79	3.54	33.88	5.12	22.33	13.31	15.39	8.72	
MSCI USA	10.50	4.16	30.77	5.50	21.87	12.67	15.24	8.94	

## FUNDAMENTALS (APR 30, 2026)

Div Yld (%)	P/E	P/E Fwd	P/BV
1.09	27.97	21.99	6.73
1.13	28.13	21.50	5.66

## INDEX RISK AND RETURN CHARACTERISTICS (DEC 29, 2000 – APR 30, 2026)

	Beta	Tracking Error (%)	Turnover (%) <sup>1</sup>	ANNUALIZED STD DEV (%) <sup>2</sup>			SHARPE RATIO <sup>2,3</sup>			Since Dec 29, 2000	MAXIMUM DRAWDOWN (%)	Period YYYY-MM-DD
				3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr			
MSCI USA ESG Leaders	na	na	2.77	14.45	16.67	15.61	1.15	0.63	0.85	na	55.34	2007-10-09–2009-03-09
MSCI USA	1.00	0.00	2.23	13.37	15.94	15.54	1.20	0.62	0.85	0.51	54.91	2007-10-09–2009-03-09

<sup>1</sup> Last 12 months <sup>2</sup> Based on monthly gross returns data <sup>3</sup> Based on NY FED Overnight SOFR from Sep 1 2021 & on ICE LIBOR 1M prior that date

# MSCI USA ESG Leaders Index (USD)

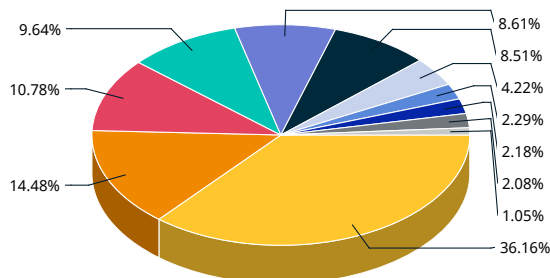
## INDEX CHARACTERISTICS

	MSCI USA ESG Leaders	MSCI USA
<b>Number of Constituents</b>	259	537
	Weight (%)	
<b>Largest</b>	14.84	7.74
<b>Smallest</b>	0.02	0.01
<b>Average</b>	0.39	0.19
<b>Median</b>	0.13	0.06

## TOP 10 CONSTITUENTS

	Index Wt. (%)	Parent Index Wt. (%)	Sector
NVIDIA	14.84	7.74	Info Tech
MICROSOFT CORP	8.81	4.60	Info Tech
ALPHABET A	6.85	3.58	Comm Svcs
ALPHABET C	5.69	2.97	Comm Svcs
TESLA	3.30	1.72	Cons Discr
LILLY (ELI) & COMPANY	2.30	1.20	Health Care
ADVANCED MICRO DEVICES	1.77	0.92	Info Tech
VISA A	1.70	0.89	Financials
JOHNSON & JOHNSON	1.70	0.88	Health Care
INTEL CORP	1.31	0.68	Info Tech
<b>Total</b>	<b>48.27</b>	<b>25.18</b>	

## SECTOR WEIGHTS



- Information Technology 36.16%
- Communication Services 14.48%
- Financials 10.78%
- Health Care 9.64%
- Industrials 8.61%
- Consumer Discretionary 8.51%
- Consumer Staples 4.22%
- Materials 2.29%
- Real Estate 2.18%
- Energy 2.08%
- Utilities 1.05%

The MSCI ESG Leaders Indexes are products of MSCI Inc. that utilize information such as company ratings and research produced and provided by MSCI Solutions LLC (MSCI Solutions), a subsidiary of MSCI Inc.

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