

MSCI ESG Reporting Service

FROM MSCI ESG RESEARCH LLC

The MSCI ESG Reporting Service is intended to make your regular reporting to clients easier, more comprehensive, and more frequent. The Reporting Service allows clients to automate reporting needs through regular and frequent delivery of batch portfolio reporting across any number of portfolios. By introducing reporting as a managed service that can be scaled across portfolios, clients may be better equipped to respond to the demands for transparency and better speak to the ESG characteristics of portfolios.

Key features and benefits

Batch reporting capabilities

Batch reporting is designed to automate the production and delivery of reporting across tens or thousands of portfolios.

Standard Reporting Templates

MSCI ESG Research offers a library of standard and off-the-shelf reporting templates designed to solve for different reporting needs, including climate change and TCFD, ESG integration, regulatory and impact reporting.

Customize reports and metrics

In addition to standard templates, the Reporting Service offers customization to tailor the content, including over 4,000 MSCI ESG data points, analytics and portfolio-level details, as well as branding and layout of reports per client requirements.

Branding opportunities

The MSCI ESG Reporting Service offers the ability to incorporate your firm's branding directly into the reporting template.

MSCI manages end-to-end implementation

We manage the end-to-end production of custom and standard reports from gathering requirements from client, scoping, implementation and delivery.

Flexible delivery frequency

The MSCI ESG Reporting Service offers flexible delivery frequency with monthly, quarterly and even daily delivery of PDF reports via FTP.

Sample ESG integration portfolio summary report



MSCI ESG Reporting Service standard report templates and options

Use standard templates built by MSCI ESG Research:

ESG Integration



The ESG Portfolio Summary is a two page report designed to assess ESG integration in a simple and intuitive way, featuring key portfolio level ESG signals, including:

- MSCI ESG Ratings Quality, Distribution and Momentum,
- Carbon Risk,
- Reputational Risk, and
- Governance Risk

Climate Risk & TCFD



The Climate Risk & TCFD Report is designed to facilitate TCFD-aligned reporting by measuring portfolio exposure to:

- Climate risk, which measures how companies are positioned with regards to transition risk in the shift to a low carbon economy.
- Clean technology, which measures portfolio exposure to companies providing solutions intended to mitigate climate change.

EU Sustainability Disclosures



The EU Sustainability Disclosures Report provides sustainability metrics that are informed by the EU Green Taxonomy and Benchmark ESG Disclosure requirements of the EU Sustainable Finance initiative. The report provides metrics relating to:

- Alignment with EU Paris benchmark standards
- Alignment with EU Climate Transition benchmark standards

Customization capabilities

MSCI ESG Research can customize the report data, layout and branding per your requirements and batch deliver PDF reporting at regular frequency.



Start with existing templates

Start with our existing templates for idea generation or to understand the capabilities and content set.



Customize or define new layouts

Design your own layouts and data outputs that MSCI ESG Research can then implement and deliver.



Scale delivery

We automate the delivery of your reporting at your defined frequency.

About MSCI ESG Research products and services

MSCI ESG Research products and services are provided by MSCI ESG Research LLC, and 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 LLC. are also used in the construction of the MSCI ESG Indexes. MSCI ESG Research LLC. is a Registered Investment Adviser under the Investment Advisers Act of 1940 and a subsidiary of MSCI Inc.

For more information on Carbon Delta, visit www.carbon-delta.com.

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About MSCI

MSCI is a leading provider of critical decision support tools and services for the global investment community. With over 45 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.

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