

# THE INDEX MATTERS

MSCI indexes are at the heart of the global investment process





MSCI HAS BEEN CENTRAL TO  
DEFINING THE GLOBAL EQUITY  
OPPORTUNITY SET FOR OVER  
40 YEARS. TODAY WE ARE  
MORE FOCUSED THAN EVER  
ON OUR CLIENTS' BUSINESS  
NEEDS AND ON DELIVERING  
THE QUALITY AND INNOVATION  
THEY NEED TO NAVIGATE  
INCREASINGLY COMPLEX  
MARKETS. OUR BUSINESS  
IS BASED ON HELPING OUR  
CLIENTS SUCCEED.



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**Baer Pettit**

Managing Director and Global Head  
of the MSCI Index Business

# WE FOCUS ON HELPING YOU SUCCEED

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In today's challenging market environment, it's more important than ever to have confidence in your index provider.

## **A Brand You Can Trust**

MSCI has been a trusted leader in index construction and maintenance for over 40 years. We have stayed the leader because, as an independent company, we have an uncompromising commitment to align our business with our clients' interests.

Listening to our clients—who are among the world's largest and most sophisticated investors—provides us with a clear roadmap for developing the products and services they will need, both today and in the future.

## **Access to All Investable Stocks Around the Globe**

Many institutional investors now consider "global equity" to be a single strategic asset class. Consultants, too, are more

frequently recommending a global equity policy benchmark as the starting point for asset allocation. Investors have chosen MSCI ACWI or MSCI ACWI IMI as their benchmark for global equity investing. Whether your portfolio is global, regional or country-specific, MSCI Indexes offer a single global lens through which to look at the equity markets.

## **Consistent Methodology**

We use a consistent set of rules for constructing MSCI indexes. Having a uniform and transparent foundation for their indexed investments helps our clients make better investment decisions because it gives them a meaningful basis on which to evaluate their portfolios, both globally and regionally, across size, sector and style segments.

**95 OF THE WORLD'S  
TOP 100 ASSET  
MANAGERS ARE  
MSCI CLIENTS\***

# YOU CAN COUNT ON OUR QUALITY

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No matter what you are doing—from measuring performance to launching an ETF—you need to have confidence that the data you are using is accurate and that you will receive it on time.

## **Research-Driven Approach**

MSCI is serious about research, both as the basis for continual product innovation and as a way to provide our clients with the insights they need to make better investment decisions. Our 150 researchers, working out of offices around the world, are focused on identifying the drivers of investment risk and return in global markets. We are uniquely able to use this in-house expertise to construct indexes that clients can use as a cost-effective basis for implementation of their investment objectives.

## **Accuracy and On-Time Delivery**

Our research team works to achieve the highest standards for clean data, achieving accuracy levels of 99.6% or better.\* MSCI calculates 160,000 end-of-day indexes daily and prices 8,500 indexes in real time. Institutional investors rely on us to be able to calculate their daily relative fund performance. We have a track record of almost perfect on-time delivery.

## **Experience**

With decades of global experience under our belts, we are experts in constructing and maintaining global equity indexes with local market expertise.

\* Accuracy calculated based on number of corrections performed over total number of securities or data points covered







WHO WE ARE

WHAT WE DO

WE HAVE DEVELOPED  
A NEW METHODOLOGY TO  
BACK-TEST EXPECTED  
SHORTFALL

READ MORE

MULTI-ASSET CLASS

EQUITIES

FIXED INCOME

## GAUGE OF GLOBAL STOCK MARKET ACTIVITY

MSCI's All Country World Index (ACWI) is the industry's accepted gauge of global stock market activity. Comprised of over 2,400 constituents, it

# WE NEVER STOP INNOVATING ... SO YOU WILL STAY LEADING EDGE

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Innovation is in MSCI's DNA. In the 1960s, MSCI created the first family of global equity indexes. In the 1980s, we launched the first emerging markets indexes. Today, MSCI continues to lead innovation in areas our clients tell us are most important to them.

## **Factor Indexes**

MSCI is the leader in Factor Indexes. We offer an extensive suite of indexes based on six factors targeting common stock characteristics that have historically earned a persistent premium over long periods of time: Volatility, Value, Quality, High Dividend, Momentum and Size. Single Factor Indexes offer institutional investors a basis to implement a cost-effective strategy focused on factors they believe will produce the best performance. Multi-factor Indexes provide a framework for institutional investors to diversify among factors.

## **Economic Exposure Data and Indexes**

MSCI pioneered our Economic Exposure Data Set and Indexes to provide institutional investors with a fresh and highly relevant basis for capturing companies' global business activity. Our methodology looks at the geographic distribution of a company's revenues, regardless of where its headquarters are located. We have launched over a dozen Economic Exposure Indexes including those targeting Asia, China and Africa, as well as a comprehensive Emerging Markets Exposure Index that includes companies from both developed and emerging markets.

**MSCI FACTOR  
INDEXES COMBINE  
THE BEST OF BARRA  
RISK MODELLING AND  
OUR EXPERTISE AT  
BUILDING INDEXES**



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