

# MSCI Thematics

Helping Active Managers to benefit from thematic investing.

Thematic investing is a top-down investment approach which capitalizes on opportunities created by macroeconomic, geopolitical and technological trends that are structural and transformative in nature, rather than short-term shifts, spanning across four themes - Environment & Resources, Transformative technologies, Health & Healthcare, and Society & Lifestyle.

## Active Managers gain a clearer view of thematic fund performance

Active Managers with a strong thematic fund offering are now benchmarking their strategies against MSCI Thematic indexes or using our Thematic constituent universe.

## How Active Managers can benefit from Thematics

Active Managers can benefit from specific advantages that our Thematic Indexes offer.

1. Use MSCI thematic indexes as a constituent universe for active strategies
2. Provide additional reporting on theme exposures, attribution and performance to end investors
3. Understand how your current portfolio is exposed to key long-term megatrends and themes
4. Manage and control these thematic exposures in a deliberate way

## Active Managers can benefit from our approach to Thematic Index construction

### Direct capture of the theme

- From idea to index constituents; no reverse-engineered industry selection
- Establish economic linkage between companies and theme, measured by relevance scores for companies from the global universe of securities
- Identify companies with emerging and upstream exposure, or exposure through M&A and capex – not just existing “pure play” names
- Research into characterizing theme accelerated by smart use of NLP and machine learning

### We identify companies by a clear rules-based approach

- Selection of constituents evolves as companies adapt to the theme and as the representation of key products and services changes

### Global Coverage

- Global universe of eligible stocks
- Look beyond sustainability trends and sector strategies

### Experts' insight

- Ensure the indexes remain aligned with their objective as themes evolve

## MSCI's range of megatrend indexes

Thematic investing helps you to gain an appropriate exposure to such diverse themes as:



### Transformative Technologies

- Cybersecurity
- Disruptive Technology
- Future Mobility
- Robotics & AI
- Digital Economy
- Fintech Innovation
- Autonomous Tech & Industrial Innovation
- Next Generation
- Internet Innovation
- Space Exploration
- Blockchain Economy
- USA Tech 125
- China Tech
- Smart Security
- Extreme Weather
- Industrial Solutions
- Future Logistics



### Environment & Resources

- Efficient Energy
- Clean Energy
- Infrastructure
- Renewables &
- Energy efficiency\*
- Natural Resources\*
- Plastics Transition\*
- Sustainable Water Transition\*
- Hydrogen and
- Future Fuels
- Sharing Economy\*



### Health & Healthcare

- Genomic Innovation
- Digital Health



### Society & Lifestyle

- Smart Cities
- Millennials
- Food Revolution
- Ageing Society
- Future Education
- Social Security



### Macro-theme

- Inflation Sentiment
- Economic Regime
- Allocator
- Ricardo Comparative Advantage
- World China Reshoring
- Marine Shipping



### Multi-theme

- Innovation
- Accelerating Change
- Thematic Rotation

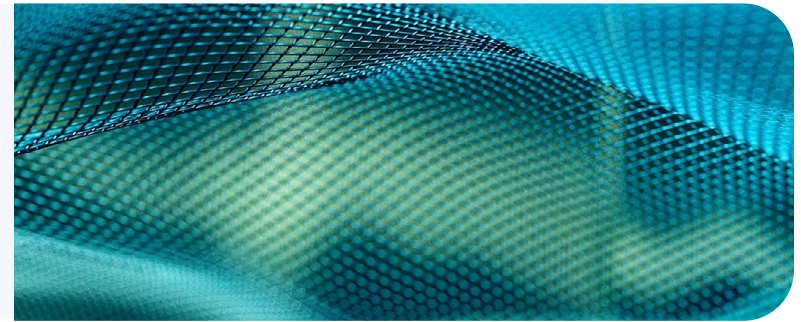
We give you a broader picture, helping you to explore the themes of the future. Our thematic offerings enhance other analytical tools and complement traditional country, industry and factor lenses when analysing and designing portfolios.

At MSCI we have a long history of anticipating emerging trends. Our rules-based methodology, in-depth insights from leading industry experts, and broad range of megatrend themes, help you understand the structural changes happening around us – and translate this knowledge into a better diversified long-term investment strategy.

**Bring the future into view with MSCI Thematic Indexes**

MSCI's Thematic Indexes are constructed by including companies that may be impacted by emerging technological, environmental, innovative healthcare and societal trends.

To explore more about our thematic offerings visit [www.msci.com/thematic-investing](http://www.msci.com/thematic-investing)



**About MSCI**

MSCI is a leading provider of critical decision support tools and services for the global investment community. With over 50 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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