

MSCI Thematics

Helping Banks 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.

Structured products on majority of our themes now available

Banks can capture the opportunities today from the companies shaping tomorrow – through thematic strategies in the form of structured products. Thematic indexes can help banks capitalize on attractive opportunities by:

1. Offering a comprehensive range of indexes based on long-term growth themes
2. Delivering to their specific needs, including customization capabilities
3. Develop investment vehicles that enable investors to gain and hedge exposures

How Banks can benefit from Thematics

We support Banks and their investment teams every step of the way as they seek to integrate relevant thematic indexes into their offering – by helping them to:

1. Understand the theme
2. Explore opportunities
3. Consider allocations
4. Evaluate performance with expert portfolio analysis & reporting

Banks 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

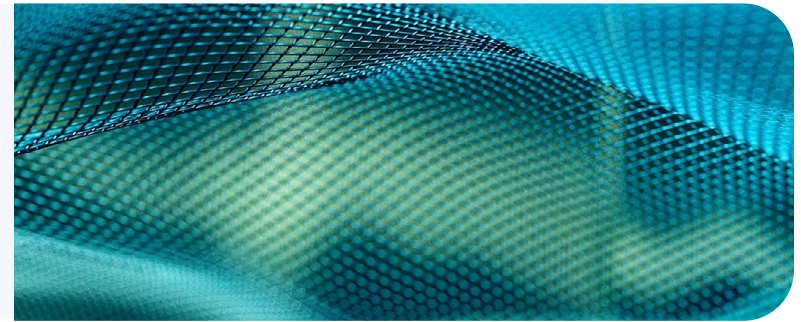
We give you a broader picture, helping you to explore the themes of the future. Our thematic offerings enhance other analytical tools and complement traditional country, industry and factor lenses when analysing and designing portfolios.

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



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.

To learn more, please visit www.msci.com.

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