

MSCI Thematics

Helping Asset Owners to better understand and manage their thematic exposures.

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.

Thematic Investing enable Asset Owners to measure and manage targeted exposures

Built as an alternative to Sector, Growth and Factors investing and gain additional insights into the full breadth of companies shaping tomorrow. Asset owners could benefit from these additional perspectives when building portfolios. Targeted exposures through thematic indexes help you to:

1. Manage exposure to long-term structural trends, and position portfolios relative to long-term risks and disrupted business models
2. Understand how themes may impact portfolios, complementing traditional country, industry and factor lenses to aid portfolio analysis and design
3. Monitor the skill and performance of thematic managers vs an appropriate and transparent benchmark

How Asset Owners can benefit from Thematics

1. Understand how your current portfolio is exposed to the key long-term megatrends and themes
2. Manage and control these thematic exposures in a strategic and tactical way
3. Get exposure to long term megatrends through indexed vehicles

Asset Owners 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

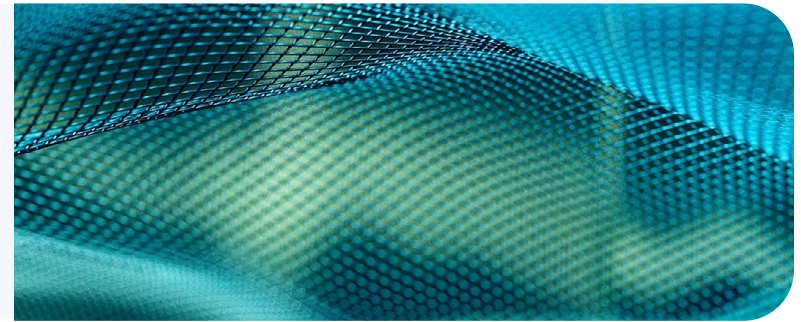
We give you a broader picture, helping you to explore the themes of the future. Our thematic offerings enhance other analytical tools and complement traditional country, industry and factor lenses when analysing and designing portfolios.

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.

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