

MSCI Strategy Explorer

Transforming investment trends into transparent, investable strategies



The MSCI Strategy Explorer is an AI-enabled solution that helps clients transform investment ideas into portfolios, baskets, or indexes — faster and more transparently. Powered by an LLM-driven workflow, Strategy Explorer calculates strategy exposures by linking company business segments to investment themes.

A thematic investment strategy seeks to identify companies linked to a trend or investment idea through their business activities. MSCI's Strategy Exposure (SE) is a revenue-based metric that measures the economic link between a company and a given theme, calculated as the aggregate percentage of a company's revenue from business segments associated with the strategy.



Key Features

- **Capture and customize ideas:** Go beyond traditional sector and factor classifications – Strategy Explorer can model exposures across market trends, disruptive technologies, and macro themes.
- **Web app:** A unique tool that enables iterative ideation, methodology evaluation, index and portfolio analysis.
- **Transparency:** Direct company-to-strategy mapping with clear in-scope/out-of-scope logic makes results auditable and client-ready.
- **Built on proven data quality:** Leverages MSCI's enriched company and segment data, validated with AI-driven quality checks.
- **Flexible:** Extends naturally to other company information — filings, news, or earnings transcripts can all leverage the same workflow.



Key Benefits

- **Faster ideation:** Build and refine new strategies quickly with transparent outputs.
- **Deeper insights:** Understand company-level exposures and narratives across fundamentals and sub-themes.
- **Customizable:** Tailor themes and sub-themes to client-specific needs and evolving market trends.
- **Speed to market:** Accelerate innovation for thematic and custom strategies.
- **Decision support:** Use exposures to simulate portfolios, run analytics, and assess risk/return trade-offs.
- **Sales advantage:** Transparent mapping between companies and strategies simplifies communication and client engagement.



Use Cases: Trusted by MSCI research, now available to clients

The Strategy Explorer is the same tool that MSCI's Research team relies on for thematic and custom index construction. It is now available directly to clients, enabling you to:

- Systematically model exposures to investment themes and sub-themes
- Select securities transparently, aligned to clearly defined theme criteria
- Accelerate development of custom indexes for ETF and structured product launches
- Evolve and refine thematic index methodologies with enhanced support



How Strategy Explorer enhances thematic exposure modeling

- Replaces keyword-driven relevance scoring with AI-based inference
- Improves transparency at the sub-theme and company segment level
- Enables consistent exposure modeling across standard and custom indexes
- Supports rapid iteration during index design and client collaboration



Who this is for

- Asset managers seeking to launch differentiated thematic products
- Sell-side structuring desks looking to build and validate thematic baskets and structured products
- Asset owners for portfolio management, investment implementation, performance analysis, and governance oversight
- Clients requiring transparent, auditable thematic methodologies

The **Strategy Explorer** enables clients to deliver more transparent, flexible, and scalable thematic and custom index solutions by combining trusted data with AI-driven exposure modeling, helping clients bring innovative index strategies to market with confidence.

Explore how the **MSCI Strategy Explorer** underpins index construction and is accessible as a tool on **MSCI One — Speak with your MSCI representative**
[Contact us](#)

About MSCI

MSCI (NYSE: MSCI Inc.) strengthens global markets by connecting participants across the financial ecosystem with a common language. Our research-based data, analytics and indexes, supported by advanced technology, set standards for global investors and help our clients understand risks and opportunities so they can make better decisions and unlock innovation. We serve asset managers and owners, private-market sponsors and investors, hedge funds, wealth managers, banks, insurers and corporates.

To learn more, please visit

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