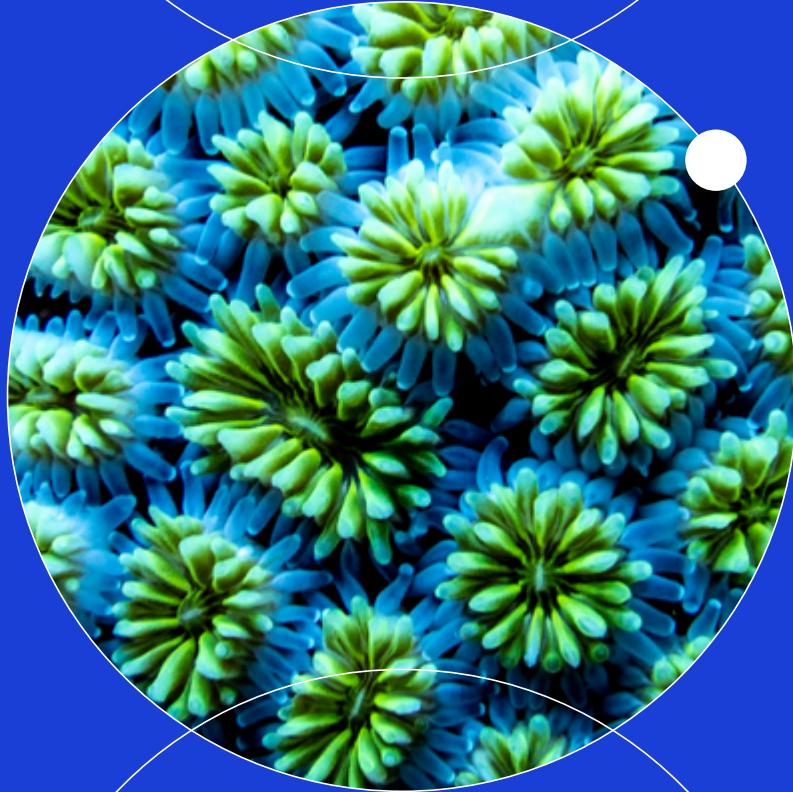




# MSCI Sustainability and Climate Indexes

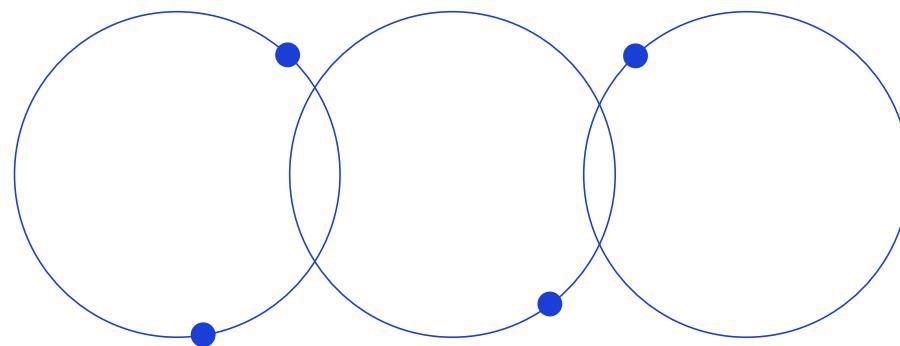
Clarity for strategies built to last



# Pinpoint the financially material signals

**Knowing clearly what affects the long-term performance of sustainability and climate strategies isn't easy.**

Our Sustainability and Climate Indexes can help you to pinpoint the signals that are financially material, enabling you to diversify and manage your portfolio with greater confidence. Whether you're looking to mitigate risks, spot opportunities, drive positive impact or align to your clients' values, we provide the data and insights to help you design strategies with a focus on long term success.



## \$1.1tn total AUM

benchmarked to Sustainability and Climate Indexes.\*

\* as of June 2025.

# How we help: a better view towards strategies that endure

**Our Sustainability and Climate Indexes are designed to ensure you get a greater level of precision on the signals that matter most.**

**1.**

## Broad and deep

We work with you to connect financial and non-financial signals across the spectrum of sustainability and climate. Our tools bring clarity to the potential impacts of extreme weather events and other physical risks, corporate governance practices, geolocation, and investments in the energy transition – alongside regulatory requirements and business operations.

**2.**

## High quality

Our research teams continually monitor and maintain the data in our indexes to ensure their quality and accuracy.

**3.**

## Increased granularity

With MSCI, you can layer our indexes and insights for a more granular view of areas that matter to you and your clients.

**4.**

## Designed with you

We continually engage with clients to understand their evolving needs and enhance our indexes to meet your needs for today and tomorrow.

# Our key indexes



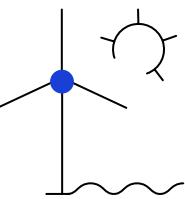
## Key climate indexes

Helping institutional investors integrate climate considerations into their portfolio decision making by benchmarking, measuring and managing climate risk exposure and identifying additional investment opportunities.

Our full range of climate indexes can be found [here](#).

| Investment need | Reduce portfolio emissions                                                                                                                                                                                             | Avoid risks and spot opportunities                                                                                                                                                                                                                | Align with 1.5°C                                                                                                                                                                                                                 | Invest in the transition                                                                                                                                                                                                                   |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Index           | Low Carbon Target                                                                                                                                                                                                      | Climate Change                                                                                                                                                                                                                                    | Climate Paris Aligned                                                                                                                                                                                                            | Climate Action                                                                                                                                                                                                                             |
| Key features    | <ul style="list-style-type: none"> <li>Choose your carbon exposure measure</li> <li>—</li> <li>Minimize portfolio exposure to carbon emissions-related risk</li> <li>—</li> <li>Closely follow parent index</li> </ul> | <ul style="list-style-type: none"> <li>Focus on emissions reduction, new climate-related solutions and annual decarbonization</li> <li>—</li> <li>Align with global standards</li> <li>—</li> <li>Screen for most severe controversies</li> </ul> | <ul style="list-style-type: none"> <li>Access advanced analytics</li> <li>—</li> <li>Combine with our sustainable impact, factor and thematic data indexes and sets</li> <li>—</li> <li>Align with global regulations</li> </ul> | <ul style="list-style-type: none"> <li>Identify companies prepared to drive the low-carbon transition</li> <li>—</li> <li>Target companies based on climate characteristics</li> <li>—</li> <li>Access climate engagement tools</li> </ul> |

# Our key indexes



## Key sustainability indexes

Helping institutional investors integrate extra financial considerations into their investment process and portfolios.

Our full range of sustainability indexes can be found [here](#).

| Investment need | Exclude or reduce exposure to certain businesses                                                                                                                       | Find a broad and diversified investment universe                                                                                                                                                        | Invest in companies with a strong sustainability profile relative to their sector peers                                                                         | Maximize exposure to companies with high sustainability ratings across sectors                                                                                              | Align investments with ethical values                                                                                                                           |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Index           | Screened                                                                                                                                                               | Universal                                                                                                                                                                                               | Selection                                                                                                                                                       | Focus                                                                                                                                                                       | Socially Responsible Investing (SRI)                                                                                                                            |
| Key features    | <ul style="list-style-type: none"> <li>Incorporate the most common exclusions</li> <li>Exclude weapons and tobacco</li> <li>Apply a carbon footprint screen</li> </ul> | <ul style="list-style-type: none"> <li>Explore approaches for universal owners</li> <li>Overweight strong and improving sustainability performers</li> <li>Screen for the most severe issues</li> </ul> | <ul style="list-style-type: none"> <li>Diversify broadly with sustainability</li> <li>Target risk management</li> <li>Screen for reputational issues</li> </ul> | <ul style="list-style-type: none"> <li>Seek increased sustainability exposure</li> <li>Select from range of solutions</li> <li>Access sector-diversified indexes</li> </ul> | <ul style="list-style-type: none"> <li>Incorporate your values into investing</li> <li>Maintain broad coverage</li> <li>Leverage SRI index expertise</li> </ul> |

# Clarity your way

Enabling you to customize an index to your specific needs.

Delivering for your clients is increasingly complex, and while our product range is extensive, it may not always provide exactly what you need. With our Custom Indexes, MSCI works with you to create an index tailored to your requirements.

## Custom Indexes may be created to:

- Reflect asset allocation
- Address an investor's constraints
- Incorporate additional criteria
- Include local regulatory guidance



# Benefits of our Custom Indexes



## Broad coverage

Ability to customize any equity or fixed income MSCI index, including Market Cap, Thematic, Sustainability and Climate Indexes, to incorporate client-specific requirements.



## Data reliability

Well-established, reliable\* index production process – the same used for calculating all MSCI indexes.



## Rigorous methodology

Indexes that aim to be replicable and transparent, designed with the same rigorous calculation and maintenance methodology that institutions have come to expect from our core index offerings.



## Global support

Cross-functional team of custom index experts in research, index production, IT and product management.

Independent  
insightsInnovative  
methodologiesHigh-integrity  
data

# Why MSCI?

Empowering confident, agile strategies built on independent insights, innovative methodologies, and high-integrity data.

1.

May  
MSCI KLD 400  
Social Index

1990

**October**  
MSCI World ESG Leaders Index (USD)  
**November**  
MSCI issues an IPO following spin off by Morgan Stanley taking with it the global index benchmarks first established in 1969

2007

**March**  
MSCI acquires RiskMetrics and, along with it, ESG research firms IRRC, KLD Research & Analytics and Innovest Strategic Value Advisors

2010

**June**  
Bloomberg MSCI ESG Fixed Income Indexes  
MSCI Emerging Markets ESG Leaders Index  
MSCI ACWI ESG Leaders Index

2013

**February**  
MSCI ACWI Sustainable Impact Index  
**March**  
MSCI launches ESG ratings for equity, fixed income and multi asset class mutual funds and ETFS  
**July**  
MSCI World Women's Leadership Index  
**August**  
MSCI ESG Focus Indexes

2016

**June**  
MSCI Climate Change Indexes  
**October**  
MSCI acquires Carbon Delta, establishing the MSCI Climate Risk Center Zurich

2019

**August**  
MSCI Climate Paris Aligned Fixed Income Indexes

2021

**November**  
MSCI Climate Action Corporate Bond Indexes

2023

## 30+ Years of MSCI Sustainability and Climate Indexes

**We empower investors with confidence and clarity.**

Indexing is the foundation of our business, and we have expertise which spans more than 50 years, over 30 of these with Sustainability and Climate Indexes.

2001

January  
MSCI USA ESG Leaders Index

2009

January  
MSCI Global Environment Index

2011

June  
MSCI Socially Responsible Investing (SRI) Indexes

2014

**August**  
MSCI acquires Governance Metrics International Ratings

**September**  
MSCI Global Low Carbon Indexes

**October**  
MSCI World ex Fossil Fuel Index

**November**  
Bloomberg MSCI Global Green Bond Index

2017

**February**  
MSCI ESG Universal Indexes  
**September**  
MSCI Factor ESG Target Indexes

2020

**January**  
MSCI Fixed Income ESG and Factor Indexes, including two investment grade ESG variants  
**February**  
Bloomberg MSCI High Yield Indexes

2022

**May**  
Bloomberg MSCI Climate Paris Aligned Fixed Income Indexes  
**August**  
MSCI Climate Transition Corporate Bond Indexes  
**October**  
MSCI Climate Action Indexes

2024

May  
MSCI Resilient Future Indexes

## Why MSCI?

### 2.

#### Experts in providing tools and clarity to investment decisions

We're a leading provider of critical decision support tools and services for the global investment community.

We are experts in research, data and technology and help clients understand and analyze key drivers of risk and return so that they can confidently build more effective portfolios.

Clients use our industry-leading, research-enhanced solutions to gain insight into and improve transparency across the investment process.

### 3.

#### In good company

Institutional investors have allocated approximately USD 493bn to investments benchmarked to MSCI Sustainability and Climate Equity & Fixed Income Indexes since 2014, so you know you're in good company.

Some of those asset owners include:

##### Americas

- CalSTRS
- Fonds de Solidarité FTQ
- MassPRIM
- New York State Common Retirement Fund
- Ontario Teachers' Pension Fund
- United Nations Pensions Fund

##### APAC

- Dai-ichi Life
- GPIF
- Korean Post
- New Zealand Super
- SingLife
- Taiwan's Public Service Pension Fund

##### EMEA

- AMF
- Ilmarinen
- Migros
- PostNL
- Swiss Re
- The People's Pension
- Zurich UK

## 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.

The process for submitting a formal index complaint can be found on the index regulation page of MSCI's website at:

[www.msci.com/index-regulation](http://www.msci.com/index-regulation)

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## Find out more

If you want the detailed financial and non-financial signals which have a deep meaning on the construction of your portfolios, talk to us about how our Sustainability and Climate Indexes can provide investment decision clarity to help your strategies prevail for the long term.

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#### Mexico

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South: 10800 152 1032 (toll free)

#### Hong Kong

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