“Index Innovation at Scale”

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Across the investment ecosystem, customization has become a defining expectation. Asset owners, asset managers, wealth platforms and distributors are seeking investment solutions aligned to specific objectives, constraints and preferences delivered at scale and with speed. As a result, index based investing has evolved beyond traditional benchmarks. Today, indexes play a central role in ideation, simulation, portfolio design, and implementation of investment ideas to operate effectively.

Organizations need capabilities that are flexible, scalable, and efficient while maintaining the governance, transparency and quality standards expected by regulators and clients. At MSCI, we are investing in technology and data innovation to support personalization at scale. We are combining our high quality data research and index expertise with modern index production technology, including capabilities gained through our acquisitions of Foxberry and Compass Financial Technologies, and applying AI to accelerate how indexes are designed, simulated and delivered.

The result is a growing set of solutions designed to help clients explore ideas more efficiently, simulate potential outcomes with confidence, and bring customized, index based investment products to market more quickly. First modern index infrastructure. Through our Indexation Services platform. Second, AI enabled tools that simplify how clients interact with indexes and data. Third, new index capabilities that extend index concepts into new asset classes and active strategies.

And fourth, new data products that enhance transparency into indexes and the investment ecosystem. They support. A cornerstone of MSCI investment is our new indexation services platform. The platform provides modular, scalable access to MSCI index, intellectual property and production capabilities, enabling faster index creation and easier workflow integration. One example of how this platform is delivering value is MSCI is new basket index calculation service.

This API powered capability enables clients to convert large numbers of basket portfolios into European benchmark regulation compliant MSCI indexes within 24 hours. Supporting both fixed and dynamic baskets. Complementing this capability is our Instant Basket Index service, which enables real time index calculation within seconds. This allows clients to monitor baskets, intraday support, pricing workflows and evaluate exposures dynamically. Combining speed with MSCI governance and quality standards.

While the platform modernizes the infrastructure of index production, AI is transforming how clients engage with that infrastructure. MSCI is integrating AI into how we deliver solutions to unlock new value for clients. MSCI index AI insights tool enables clients to analyze and compare index characteristics, understand methodologies and investigate index rebalances using natural language prompts to an AI enabled interface available through MSCI one and third party platforms including Claude and ChatGPT.

Future capabilities may include monitoring, alerts and natural language driven index design. MSCI Investment Strategy Explorer tool enables clients to create unique data sets and portfolios by identifying stock exposures to user defined investment themes. Using natural language prompts internally. MSCI uses AI enabled tools to support the custom index creation process by translating unstructured client requirements into structured methodology features and identifying missing information early.

Helping us deliver custom indexes more efficiently, we are expanding the range of problems indexes can help solve. This includes extending index concepts into private markets through solutions such as the MSCI All Country Public Plus Private Equity Index, MSCI All Country Venture Backed Private Company Index in the MSCI World Private Equity Return Tracker Index, providing insight into historically less transparent asset classes through our new Active Strategy indexation service, MSCI indexes can now dynamically reflect clients actively managed investment strategies, combining features of active and index based approaches to help clients build differentiated investment products and scale customization of strategies tailored for specific investors and distribution channels.

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Beyond new indexes, we are strengthening transparency for our clients through new data products. Our index methodology data sets provide detailed security level inputs used in the construction and rebalancing of MSCI sustainability and factor indexes. While our investable data product provides granular insight into security level, free float and liquidity characteristics for index constituents. Our index constituent AUM data set helps clients understand the size and evolution of assets linked to MSCI indexes and their constituents, supporting assessment of potential impacts from index events such as rebalances.

These data sets are designed for clients who rely on deeper insight into index, composition, methodology and asset flows across index services, AI enabled tools, expanded use cases, and new data transparency. MSCI is investing to remain best in class as an index provider and a broader partner in investment portfolio solutions.

About MSCI Inc.

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.

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