

ESG Select

FactSet's ESG Solutions

FactSet's ESG solutions give clients the ability to understand the ESG characteristics of investments using flexible tools and delivery that suit their investment process.

FactSet combines leading data, artificial intelligence, and reporting tools, allowing clients to integrate ESG across the portfolio lifecycle. FactSet offers third-party ESG content and produces differentiated data that tracks how companies are performing on ESG issues according to external stakeholders using sentiment analysis. This content helps eliminate "blind spots" found in data sets based on company disclosed information. In addition, FactSet collects raw metrics from company reports and standardizes as-reported business segments, allowing clients to customize their ESG analysis and understand granular business exposure.

Our connected ESG content and wide coverage enables clients to build seamless workflows from portfolio construction and analysis, to risk and reporting using the most effective ESG data - delivered on or off platform.

On-Platform Solutions

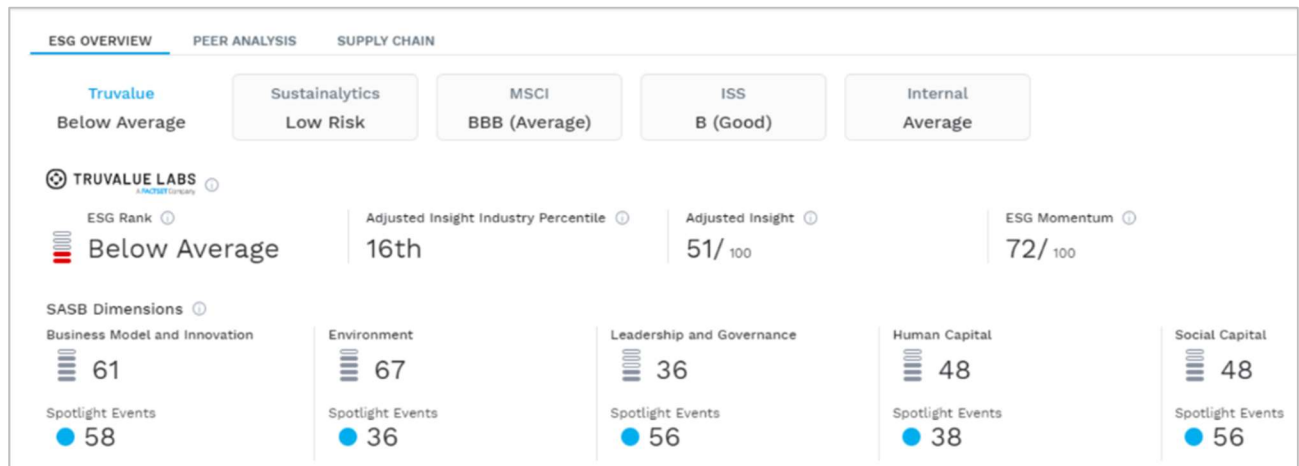
The on-platform ESG Select Workstation is a single open source for customized ESG research and analysis – powered by all the data you need

Content Highlights

- *Truvalue Platform*
 - Real-time ESG Sentiment and performance on entity, portfolio, and sector levels
- *Thematic Business Exposure*
 - Map revenue-based company sector classification to ESG Themes via RBICS with Rev
- *SFDR Principle Adverse Impact Indicators*
 - Coverage of all 14 mandatory and 32 of 33 additional indicators for corporates
- *Green, Social and Sustainability Bonds*
- *Shareholder Proxies*
- *Management & Board Diversity*
- *Core FactSet Content Including:*
 - Capital Structure, Corporate Transactions & Events, Economics, Estimates, Fixed Income, Fundamentals, Market Data, Mutual Funds & Exchange Traded Funds

Workflow Highlights

- *Company / Security ESG Report*
 - Consolidated source for FactSet & third-party ESG ratings, metrics, news & research
- *Portfolio Monitoring*
 - Custom portfolio view with FactSet, third-party & proprietary data
- *Screening*
 - Screen for securities & test new mandates using FactSet & third-party ESG data
- *ESG News, Events & Research*
 - One source for ESG research, News, Truvalue Spotlight Events & more
- *Alerting*
 - Custom news alerts based on a watchlist, portfolio or topic



Third Party Integration

Third Party Data can be integrated throughout FactSet so you can view multiple ESG Vendor scores in places like our ESG Report and Portfolio Views with agreements with Third Party Data providers. These data sets are also available for consumption via feed. Our ESG Select Package comes with teaser data integrated throughout the workstation from ISS and data from Sustainalytics can be turned on for no cost. The ISS teaser universe consists of 10,000 global companies while the Sustainalytics teaser dataset covers approximately 2,000+ global companies.

Third-Party Data that can be integrated includes:

- IdealRatings
- Entelligent
- Verisk
- ISS ESG
- MSCI
- Sustainalytics
- FTSE Russell
- Trucost

If an Off-Platform data feed of a Third Party is required, please visit our [Open: FactSet Marketplace](#) to view what vendors datasets are available from a data feed.

Talk to a FactSet Specialist to discuss the most effective ESG solution for you: esg.sales@factset.com.