Issues such as climate change, diversity, human rights, “license to operate,” business ethics and corporate governance are at the forefront of public and political attention. Investors are increasingly demanding that these issues are factored into their portfolios, and financial professionals are differentiating their services using environmental, social and governance (ESG) criteria.

Why choose Refinitiv for your ESG research and analysis?

With Refinitiv, you can easily integrate ESG factors into portfolio analysis, equity research, screening or quantitative analysis, so you can more effectively deliver on investment mandates, meet client demands and identify risks across your portfolios. Access all the data and tools you need in one place including:

**Data**
- Transparent ESG data and scores for 9,000 global companies with data since FY2002, longer than other providers
- Customized analytics, scores and ranks to meet specific ESG requirements
- 450+ ESG data points and 70+ ESG analytics – all standardized so you can easily benchmark companies
- Real-time ESG signals from 75,000 sources, for portfolio construction and company monitoring in partnership with Truvalue Labs
- Green bonds data from the Climate Bonds Initiative (CBI)

**Tools and analytics**
- Screening tools to help you efficiently mitigate risk and find alpha
- Portfolio analytics and risk-monitoring tools
- Idea-generation tools to screen for ESG mandates and drill down into company-specific metrics
- ESG country ranking models offer a relative performance across each of the UN Sustainable Development Goals (UN SDGs) for 210 countries
- Carbon data and estimate models that are both patented and fully transparent – providing a CO₂ estimated value when a reported value is not available
- Carbon footprint monitoring and reporting to meet regulatory requirements
- Indices including ESG, Diversity and Inclusion, Fossil Free and more

**Access the data**
Our ESG data is available through Refinitiv® Workspace, Eikon Excel®, add-in, Datastream®, Datastream Data Loader (DDL), QA Direct® and the Refinitiv Data Platform Cloud API.

**ESG Data on Refinitiv Workspace and Eikon**
ESG Data on Refinitiv Workspace and Eikon allows for seamless integration of financial and nonfinancial data sets, allowing you to see the full picture. Refinitiv Workspace and Eikon allow for full transparency into our ESG data, with click-to-source capabilities throughout the products.

*Find out more about Eikon: refinitiv.com/eikon*

**ESG Data via Refinitiv Data Platform Cloud API**
We are among the first ESG providers to use the cloud to deliver ESG data. This enables you to reduce the need for significant on-site infrastructure and achieve greater operational efficiency. The Refinitiv Data Platform Cloud API can fully align with your organization’s cloud strategy, delivering data to whichever provider you are working with.

**Get ESG custom reports**
Our ESG Scorecard provides a comprehensive snapshot of a company’s environmental, social and governance performance over the last five fiscal years.

*Discover more at: refinitiv.com/ondemand*
Integrate ESG into your workflow

Risk assessment and mitigation

We provide simple tools so you can efficiently carry out negative screening to identify companies involved in activities such as alcohol, tobacco and armaments.

In Refinitiv Workspace and Eikon, select the customizable criteria and quickly narrow down your list of companies to offer insight into risk exposure faster than ever before. On the same platform, you can perform portfolio optimization against ESG metrics.

Our Refinitiv Lipper Fund ESG scores provide investors and fund selectors with independent fund level scores which highlight the sustainability of a particular investment fund.

In the Eikon Excel add-in, ESG country scores are available to provide insight into countries’ relative performance across the UN SDGs, allowing you to bring more insight into your bond analysis.

Our Cloud API solution provides you with ESG data to carry out negative screening and risk exposure on the companies in your portfolio or watch list.

Monitor your coverage universe

Quickly spot trends and make comparisons within your portfolio of companies.

In Refinitiv Workspace and Eikon, load your coverage universe and easily configure the ESG criteria so you can see aggregated ESG measures per sector or region on any metric, on the fly.

Compare your coverage universe with our ESG data which is fed into your financial systems via our Cloud API, allowing you to see how a company performs on over 450 ESG metrics.

Generate investment ideas

Combine ESG metrics with other factors such as StarMine® quant model scores to identify investment opportunities. Screen your coverage universe by easily aligning your ESG mandates with the associated filters.

Dive into the details for any number of the 9,000 companies with our transparent ESG views in Eikon. With the click of a button, compare companies side by side against key metrics.

Use our Cloud API to integrate ESG data with your proprietary and other third-party data to use within your analysis and investment decision-making process.

Real-time and materiality component

Refinitiv and Truvalue Labs bring to you Insight360 SASB Edition, an ESG data platform that is comparable, timely and financially material. Leverage the Sustainability Accounting Standards Board (SASB)’s ESG Materiality Framework to find opportunities and manage risks. The Insight360 app is integrated into Eikon and combines the power of Truvalue Labs’ timely ESG insights with Refinitiv’s robust set of ESG data, all filtered by the SASB materiality standards. Find opportunities, manage risks and build portfolios to meet any ESG strategy.

Meet regulatory or voluntary reporting requirements

Meet voluntary commitments or regulatory reporting requirements using our ESG data.

Our Portfolio Analytics tool available in Refinitiv Workspace and Eikon, helps you measure and report on aggregated ESG scores or the carbon footprint of your portfolio.

Our ESG data and analytical tools help to indentify fund’s with strong ESG practices and screen through funds on a given ESG criteria across the Refinitiv Lipper database.

Our ESG Cloud API allows you to review 80% of global market cap, ensuring you are reporting on regulatory issues relating to your portfolio.

ESG METRICS

A

GGREGATED ESG MEASURES

OF THE

450+

ESG METRICS, 186 COMPARABLE MEASURES ARE USED IN THE ESG SCORING

MORE THAN

450 DATA POINTS, RATIOS AND ANALYTICS

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