

ESG DATA AND SOLUTIONS FROM REFINITIV

Research with confidence | Integrate with ease

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 10,000+ companies globally 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
- Near real-time ESG data evolved from news and social media capturing 30,000+ companies and 252 countries and regions
- Green bonds data from the Climate Bonds Initiative (CBI)

Tools and analytics

- Various ESG company views allowing you to dive deep into the sustainable performance of companies
- 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, Refinitiv Datastream®, Refinitiv Quantitative Analytics, the Refinitiv Data Platform Cloud API the Bulk Service on Refinitiv Data Platform and on refinitiv.com/esgscores

Contribute the data

Contribute your firm’s ESG data to the Refinitiv ESG database to ensure that the thousands of investors using our products are able to get the full view of your firm. **Learn more:** refinitiv.com/esg-contributor-tool

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.

The ESG Bulk Service API delivered on Refinitiv Data Platform allows for pre-canned files containing the entire universe to be downloaded to the client machine – ideal for quants and investors to actively integrate ESG factors into their models, workflows and analyses.

ESG data via Refinitiv Quantitative Analytics and FTP

Refinitiv Quantitative Analytics can be easily incorporated into your investment and analysis process, whether it be quantitative or qualitative. You can access Refinitiv MarketPsych ESG Analytics which provide near real-time ESG data. The scores allow investors to monitor and minimize risk, exist stocks and break controversies before mainstream media.

Find out more about Refinitiv Quantitative Analytics: refinitiv.com/quantanalysis and **MarketPsych data:** refinitiv.com/marketpsych

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.

Tracking portfolios for specific metrics with Refinitiv MarketPsych ESG Analytics, including anger levels, allows you to predict the direction of stock prices.

Generate investment ideas

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

Assess and find Fixed Income investment options in Eikon's Green Bond Guide.

Dive into the details for any number of the 10,000+ companies with our transparent ESG views in Eikon. With the click of a button, compare companies side by side against key metrics.

Focus on near real-time ESG data from the Refinitiv MarketPsych ESG Analytics and combine with other fundamental or alternative data in Refinitiv Quantitative Analytics and Eikon.

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.

The Bulk Service on Refinitiv Data Platform enables quants and investors to integrate vast amounts of ESG company data, measures and scores along with history for these data points into their models and analyses to create investment strategies.

Incorporate near real-time and materiality component

Refinitiv MarketPsych ESG Analytics are derived from an innovative AI-powered NLP system for extracting complex meaning from text of 2 million articles daily resulting in a simple 1-100 rating. The scores are mapped to the SASB framework, and U.N. Sustainable Development Goals (SDGs) where possible.

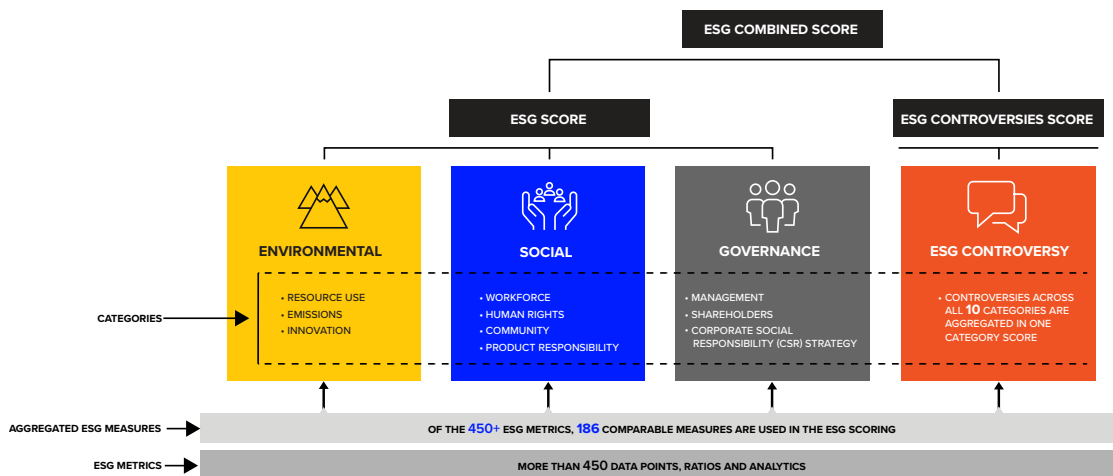
Meet regulatory or voluntary reporting requirements

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 identify funds 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.



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