

Empowering impact-focused investors with transparent ESG data and solutions

Global brokerage firm Interactive Brokers has introduced cutting-edge ESG solutions to sophisticated high-net-worth investors as they are increasingly looking to invest in sustainable opportunities around the globe. More recently, the firm launched its award-winning Impact Dashboard tool, powered by Refinitiv data. The tool allows the firm's customers the ability to tailor their investment choices to ensure that their investments reflect their personal values.

Educating and empowering ESG investors

Investors are receptive to environmental, social and governance (ESG) investing as it resonates with their own beliefs – and with greater understanding, they know that they have the potential to achieve positive returns as well. Although ESG investment awareness and allocations have increased, more granular and transparent data is needed to help meet investors' requirements.

As high-net-worth investors become more aware of ESG factors, many have become more sophisticated and knowledgeable regarding [ESG investing](#). Clients also want to understand the impact that their investments are having – that is why we launched our Impact Dashboard in October 2020, powered by our proprietary algorithm and Refinitiv data sets.

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When it comes to ESG data, we collaborated with Refinitiv because they offer the granularity and transparency expected by our clients.



Investors use the Impact Dashboard to personalise their investing experiences. Clients enter the values they care about most into the Impact Dashboard and highlight the controversial areas they would like to avoid. Impact Dashboard generates personalised impact scorecards that can help investors ensure that their investments reflect their values. Clients can also improve their scores by aligning their positions more closely to investments with a positive social impact.

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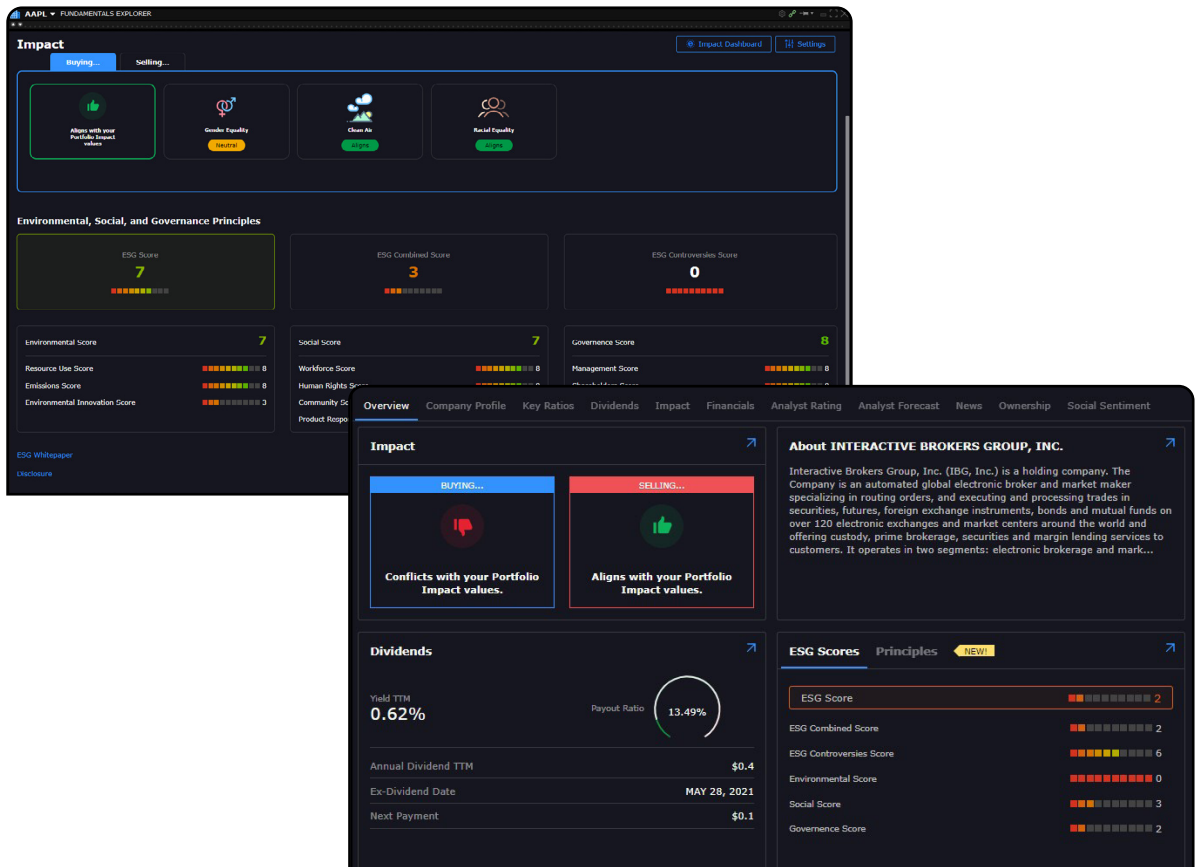
Investing in our relationship with Refinitiv means we can enhance our existing suite of products, create innovative solutions and quickly respond to market opportunities.

Data-powered innovation

Our 20-year relationship with Refinitiv and its predecessors has enabled us to access data sets that help power our innovation, especially in the ESG space. In 2019, we started to assess the future of investing – focusing on profitability and investing through ESG lenses. Beyond ESG, collaborating with Refinitiv meets our broad-ranging data needs across multiple asset classes, from equities to fixed income.

While it is clear ESG investing is here to stay, as the Covid-19 pandemic spread, it helped to highlight the importance of ESG, particularly for the S or social pillar. Investors are now examining how companies are responding to the pandemic, taking care of their employees and contributing to communities where they operate.

We work with Refinitiv because it offers a high level of depth and breadth of data, with considerable granularity and global coverage of issuers and markets. The level of detail behind each of the three pillars of E, S and G is particularly valuable. Refinitiv’s ongoing expansion into other asset classes has helped us to advance our own innovation. For example, we had previously relied on computing exchange-traded funds’ (ETFs) scores by looking at each individual component, but now we can rely on Refinitiv’s overall ETF scores.



Investing in our strategic relationship

In early 2021, we signed up for a new strategic relationship with Refinitiv that gives us broad access to Refinitiv's market-leading data, insights and capabilities. Refinitiv offers a comprehensive range of data sets and we work with specifically assigned teams, so we have dedicated support to address any challenges.

Investing in our relationship with Refinitiv means we can easily enhance our existing suite of products, create innovative solutions and quickly respond to evolving client requirements, including [ESG investing](#) and geopolitical events, such as Covid-19.

Working with Refinitiv provides us with a strategic vendor relationship. Given the global nature of our business, Refinitiv provided us with the breadth of capability and operational resilience needed to help us scale up our global growth aspirations. ■

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Wealth Solutions at
[refinitiv.com/wealth-
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3. *Please click on the following link for more information on the [Impact Dashboard](#).*