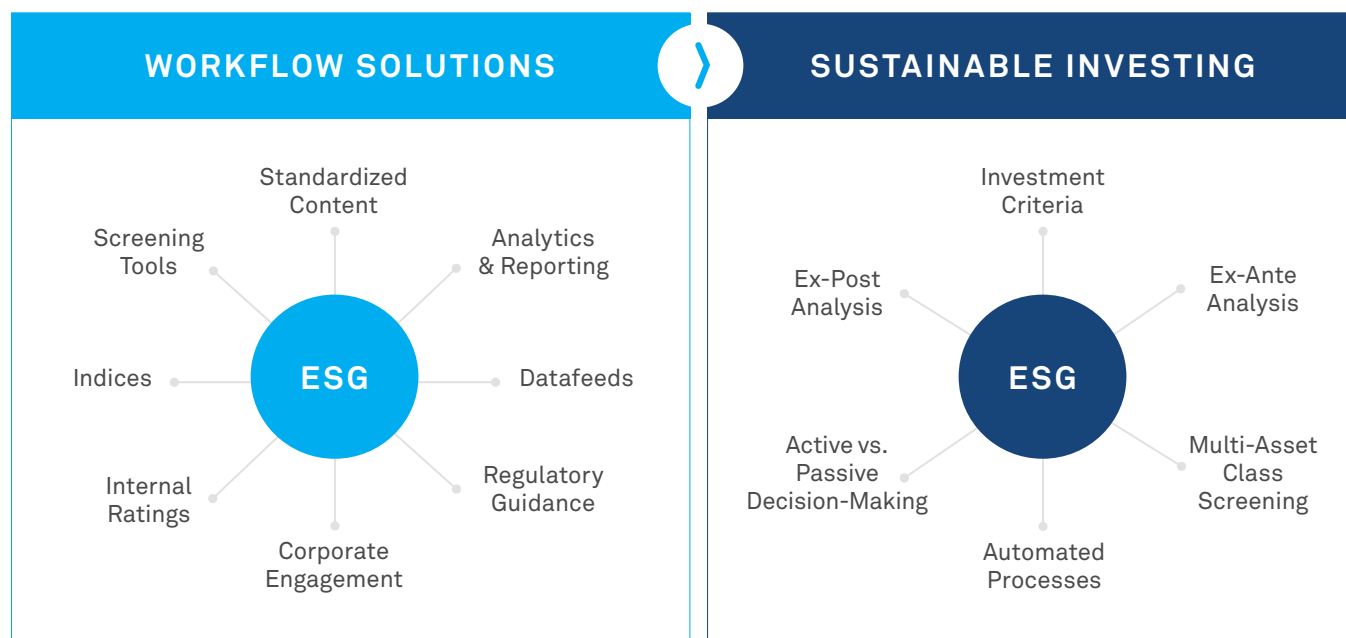


# SOLUTIONS FOR ENVIRONMENTAL, SOCIAL, AND GOVERNANCE (ESG) INVESTING

Leverage FactSet to integrate ESG content into your portfolio and risk analytics, screen ESG factors across an investible universe, and generate research ideas.



FactSet offers flexible, industry-leading ESG data and analytics to enhance the portfolio strategies, reporting, and compliance capabilities of finance professionals worldwide.

## GAIN UNIQUE INSIGHTS WITH POWERFUL CONTENT

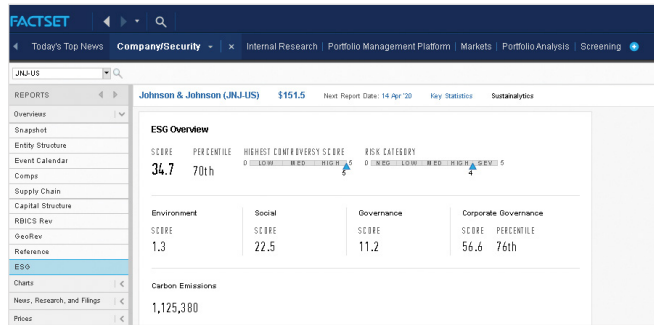
Enhance and refine your ESG analysis by leveraging FactSet's best-in-class content across your multi-asset class portfolios:

- Accurate, highly granular ESG peer-group classification that is based on the company's product offerings and is mapped to the United Nations Sustainable Development Goals via FactSet's Corporate Hierarchy data
- Power your ESG-signal building with FactSet's Transcripts and StreetAccount data feeds
- Transparency and related entity analysis of the U.S. Treasury's Office of Foreign Assets Control (OFAC) sanctions lists and other restricted lists maintained by global authorities
- Insight into the complex global networks of companies' business relationships (customers, supply chains, competitors, and strategic partners) with FactSet's Revere datasets
- Single-company ESG scores shown on an absolute and percentile basis with the ESG Overview Report, powered by Sustainalytics
- Management Boards' key governance details and practices with FactSet People database
- All-inclusive picture of activism from the company, activist, and campaign level with FactSet SharkRepellent, allowing for a quick analysis of poison pills, defense tactics, or the objectives of each party involved

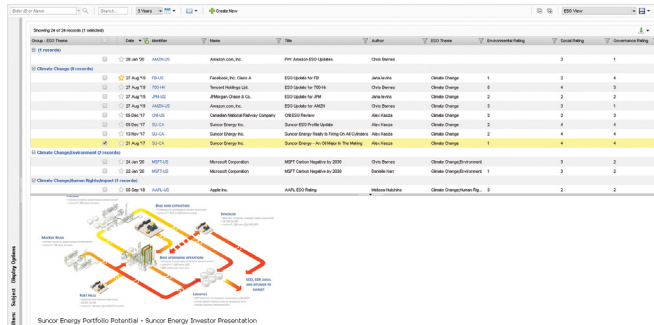
# FACTSET > SEE THE ADVANTAGE

## EASILY INTEGRATE BEST-OF-BREED ESG CONTENT

Access environmental, social, and governance research and ratings from top ESG providers through the Open:FactSet Marketplace. FactSet's connected data model allows you to seamlessly connect disparate data sources by mapping to a single entity identifier. Easily compare factors and scores from varied providers across your universe of companies and integrate them into your Jupyter, Python, or Tableau analysis.



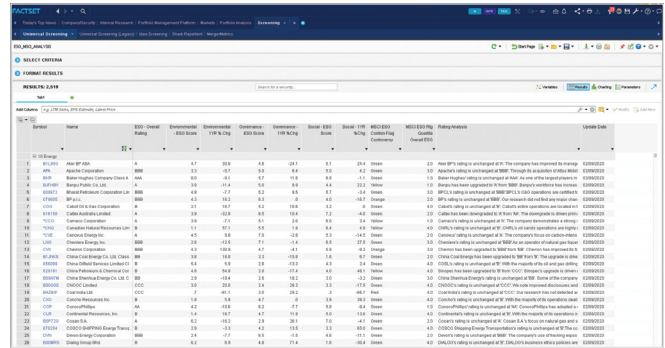
Create your comments along with proprietary ESG scores and easily track your engagement with other companies on specific aspects of ESG materiality. Incorporate your custom ratings/scores into Microsoft Excel templates, Universal Screening, and your portfolio dashboards alongside content from third-party providers.



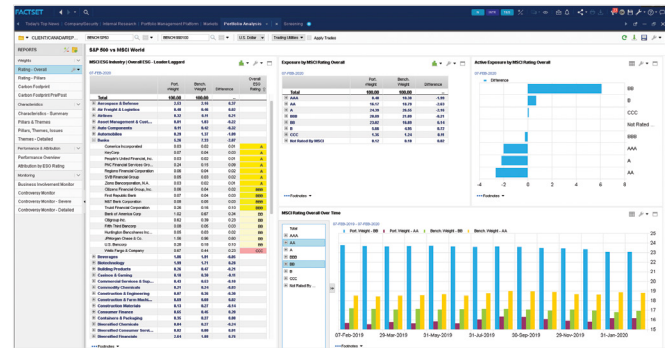
## STREAMLINE AND CUSTOMIZE YOUR ESG INVESTMENT PROCESS

Use sophisticated screening technology to dynamically include or exclude securities based on specific ESG criteria. Power your workflow with the best available ESG and company data for negative- or norms-based screening strategies and gain access to ISS, MSCI, Sustainalytics, and FactSet content. Go further by running a wide range of statistical analyses to uncover the predictive nature of returns for ESG factors. Tailor your reporting with FactSet's industry-leading Portfolio Analysis application. Combine well-known ESG provider data with fundamental data

to perform an ex-post analysis of ESG performance, attribution, and competitors across your portfolios.



Monitor and adjust your model portfolios and explore ESG factor contribution, attribution, and multi-asset class risk for a deeper ex-ante analysis. Centralize reporting with the ESG Publisher Snapshot to produce a single PDF that highlights ESG scores and momentums for any client fund, index, ETF, or model portfolio.



Integrate FactSet or third-party ESG content into your proprietary software with FactSet's Standard Content, OnDemand, and Real-Time Exchange data feeds. Add the data to your proprietary models, algorithms, and systems for flexible and more powerful ESG analysis.

### ESG Scores - How are companies actually behaving?

How does a company compare to its peers and what has been its trend?

The scores and volume indicators are provided for the Truvalue company IDs. The following tables can be used to tie Truvalue IDs to an ISIN or FactSet ID.

# Define variables to be passed into our SQL query:

ticker = "VOW3.DE" #The query is structured to work off of a Ticker-Region input. #This can be adjusted to work off of SEDOL, CUSIP, ISIN, etc.

# Make show=1 to see the query or access it within the "SQL Queries" directory

q = loadsql\_get\_sql(qos.path.join(sql\_path, '1.1.1.Volkswagen ESG Scores.sql'), show=0, connection-dsn).format(ticker=ticker)

vw = pd.read\_sql(q, conn, index\_col='tv\_date')

vw\_plot = vw[['all\_categories\_pulse', 'all\_categories\_insight', 'all\_categories\_momentum']]

vw\_plot.plot(figsize=(15,5), title=ticker + str(' All Category Scores'))

plt.show()

