

Solutions for ESG Investing

Gain comprehensive environmental, social, and governance (ESG) solutions at every stage of your portfolio lifecycle with unique content, seamless data integration, robust analytical tools, and flexible delivery options.



POWER YOUR ESG STRATEGIES WITH UNIQUE CONTENT

Assess material ESG risks and opportunities, meet evolving client demands, and navigate shifting regulations with global multi-asset class and third-party data.

- Leverage artificial intelligence (AI)-driven ESG data for more than 26,000 public and private companies via FactSet’s Truvalue Labs
- Rely on core company, event, alternative, and market data from FactSet’s extensive coverage universe
- Take advantage of centralized ESG intelligence, research, and real-time news
- Access over 40 ESG datasets from leading third-party sources that have been collected and vetted by FactSet

LEVERAGE SEAMLESS DATA DISTRIBUTION VIA AMAZON REDSHIFT

Rely on frictionless onboarding of new content with FactSet on Amazon Redshift. Experience secure delivery of ESG data across your organization to build successful workflows for evaluating sustainable investing and material risks.

- Activate FactSet’s 90+ content sets in your Amazon Redshift cluster with a few simple steps
- Ensure consistent, firm-wide integration of ESG data directly within your financial models, internal systems, web portals, and other solutions with SQL-ready access
- Maximize the value of your proprietary data on Amazon Redshift by connecting it with content from FactSet and external providers, client portfolios, and benchmarks

FACTSET > SEE THE ADVANTAGE

UNCOVER HIDDEN INSIGHTS WITH ADVANCED TECHNOLOGY

Quickly review the most important and material ESG events and incorporate an external perspective on company ESG performance with award-winning AI and machine-learning technology. Combine FactSet's Truvalue Labs scores with traditional data from leading ESG vendors to create your own composite score for a holistic view of sustainability. Discover your unique investment themes, manage risk, and avoid being blindsided with timely ESG alerts. Rely on millions of monthly signals to keep pace with market-moving issues, engage more effectively with portfolio companies, and detect ESG controversies before they are announced.



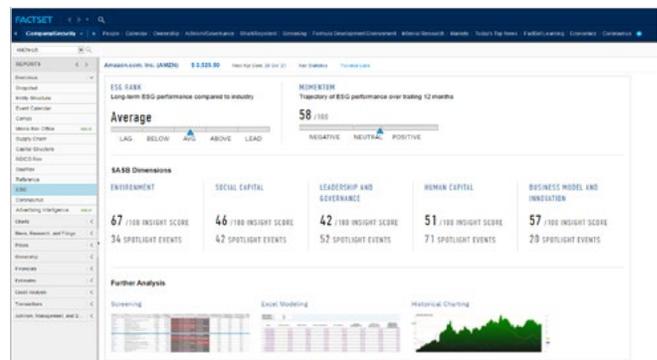
STREAMLINE AND SATISFY MULTIPLE WORKFLOWS

Boost your sustainable investment workflows with solutions for every stage of your research and composite scoring, portfolio construction and impact assessment, risk management, company analysis, and regulatory compliance and reporting. Create ESG scores based on your coverage universe and top sustainable investment themes. Develop proprietary ESG factors and scoring concepts and add internal research comments to communicate your strategy's strengths and weaknesses. Analyze the sustainability impact of your investments against a benchmark with multi-asset class analytics and portfolio products. Examine and engage with companies using timely information on material ESG risks.

 <p>RESEARCH</p> <p>Research public and private companies for industry insights</p>	 <p>COMPOSITE SCORING</p> <p>Integrate multiple ESG data sources to create a composite score</p>	 <p>PORTFOLIO ANALYTICS</p> <p>Combine ESG factors with traditional datasets for deep portfolio analysis, construction, and reporting</p>	 <p>RISK MANAGEMENT</p> <p>Identify both positive and negative ESG factors</p>	 <p>COMPANY ENGAGEMENT</p> <p>Uncover emerging and material ESG issues for better discussions</p>	 <p>REGULATORY COMPLIANCE</p> <p>Meet regulatory demands with accurate data, analysis, and reporting</p>	 <p>IMPACT ASSESSMENT</p> <p>Align with SDGs to better understand portfolio impact</p>
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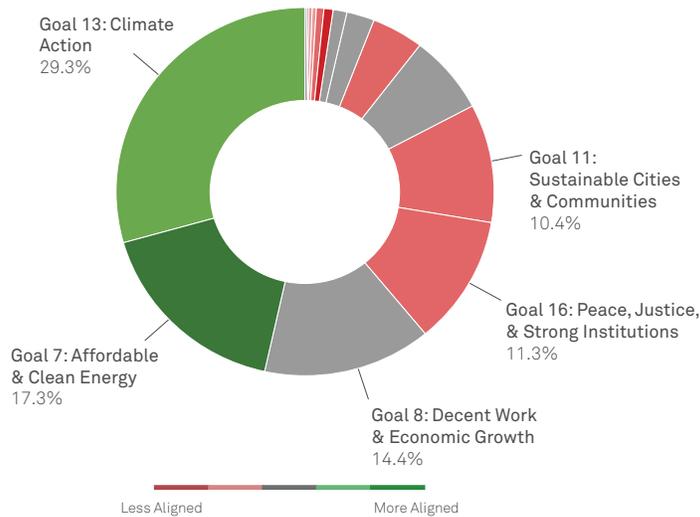
LEVERAGE SASB'S MATERIALITY FRAMEWORK TO MANAGE RISK AND UNCOVER OPPORTUNITY

Access scores based on Sustainability Accounting Standards Board (SASB) Standards to identify, manage, and communicate both financially-material and industry-specific sustainability information. Monitor material ESG issues that could impact portfolio value, reduce blind spots, and better manage risk using Truvalue Labs SASB data. Create your own unique proprietary ESG composite score by incorporating Truvalue's timely, objective data from a third-party stakeholder perspective into your ESG research process.



TRACK PORTFOLIO IMPACT AND ALIGNMENT TO THE SDGS

Better understand the impact of your portfolio companies by measuring their positive and negative alignment to the United Nations Sustainable Development Goals (SDGs). Streamline your reporting with more than 13 years of scores and events tied to the SDG framework. Experience deeper precision and granularity when reporting on revenue exposure to products and services that align with the SDGs using FactSet’s Revere Industry Classification System (RBICS).



RECENT SDG SPOTLIGHTS — TESLA

- **Goal 13: Climate Action**
Tesla, Elon Musk celebrate 1M electric cars built
- **Goal 7: Affordable & Clean Energy**
Tesla Launches Megapack, A Utility-Scale Energy Storage System
- **Goal 8: Decent Work & Economic Growth**
Elon Musk defies coronavirus orders, opens his California Tesla factory
- **Goal 16: Peace, Justice, & Strong Institutions**
Tesla scrutinized by U.S. agency over Model 3 safety claims
- **Goal 11: Sustainable Cities & Communities**
Tesla says update lets cars automatically stop for traffic lights

SIMPLIFY SFDR REGULATORY REPORTING

Navigate rapidly changing ESG regulations with best-in-class portfolio analytics, efficient reporting tools, and a knowledgeable team of regulatory experts. Ensure compliance with new disclosure and reporting obligations from the Sustainable Finance Disclosure Regulation (SFDR) for both Principal Adverse Impacts (PAIs) and alignment with the EU Taxonomy. Leverage mandatory and additional PAI indicators to facilitate your reporting on the impacts of financial products within the EU. Save time by allowing FactSet’s unique content to help with managing eligibility criteria, minimum safeguards, and the Do No Significant Harm (DNSH) principle.

