



ESG FUND RATING

Institutional and individual investors are increasingly interested in investing through a sustainability lens but find it challenging to identify funds that align with their investment objectives and values.

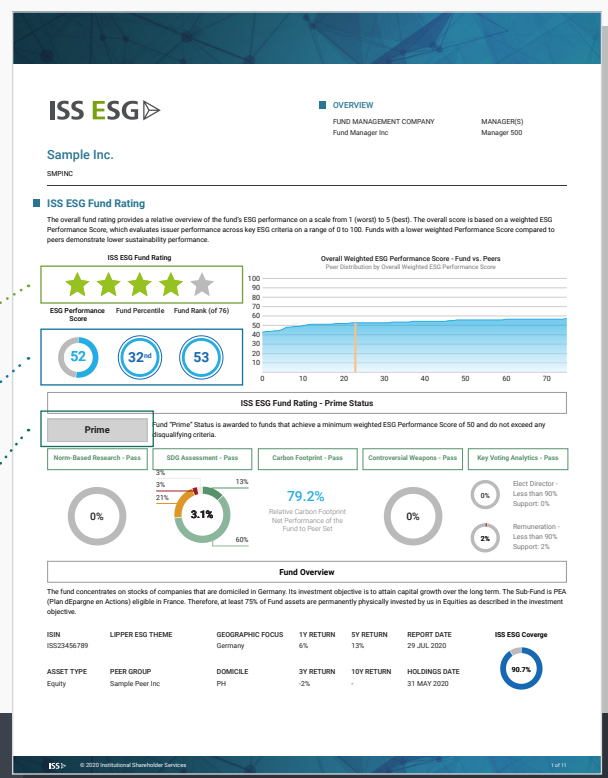
EVALUATE THE ESG PERFORMANCE OF EQUITY AND BOND FUNDS

The ISS ESG Fund Rating enables investors to quickly and effectively evaluate the environmental, social and governance performance of equity and bond funds globally.

FINANCIALLY MATERIAL AND HOLISTIC SUSTAINABILITY SIGNALS

The key fund rating results are mainly derived from the pioneering ISS ESG Corporate and Country Ratings, which provide financially material and holistic sustainability signals on companies' and countries' current and future ESG performance.

- ✓ **1 to 5 Relative Star Rating:**
Based on ESG Rating performance against peer funds.
- ✓ **0 to 100 ESG Performance Score:**
Weighted average of ISS ESG Corporate and Country Rating Performance Scores.
- ✓ **Prime Signal for ESG Leaders:**
Awarded to funds with an ESG Performance Score ≥ 50 that do not exceed any disqualifying criteria.



OUTSTANDING THEMATIC BREADTH AND DEPTH

The ESG Fund Rating report provides a comprehensive 10-page of fund and peer comparison insights across major ESG themes, including E, S and G performance, global norms, carbon emissions and climate change, the UN Sustainable Development Goals, controversial weapons, and proxy voting.

Powered by data and insights from broad range of high-quality research products within the ISS ESG universe

- ESG Corporate Rating
- ESG Country Rating
- Norm-Based Research
- Governance QualityScore
- SDG Solutions Assessment
- SDG Impact Rating
- Voting Analytics
- EU Taxonomy Alignment
- SFDR Principal Adverse Impact
- Carbon and Climate Data
- Climate Scenario Analysis
- Energy & Extractives Screening
- Sector-Based Screening
- Controversial Weapons



ACCESS
2,200
DATA FACTORS

DRILL DOWN TO THE TOPICS THAT MATTER TO YOU

With access to approx. 2,200 client-facing factors in Fund Ratings and Fund Screening on our proprietary DataDesk platform, investors can easily perform in-depth screening and analysis on fund performance based on metrics included in the report, as well as additional factors that are available on the platform.

USE THE ESG FUND RATING TO

- ✓ Screen funds for alignment with your ESG investment policies
- ✓ Identify funds that meet your clients' ESG preferences
- ✓ Promote your funds' ESG performance against benchmarks using the ISS ESG stars rating license
- ✓ Meet requirements of global reporting frameworks, such as the PRI

THE ISS ESG DIFFERENCE



INDUSTRY PIONEER

Pioneered ESG ratings, Norm-Based Research and portfolio climate risk assessments.



QUALITY FIRST

Strict data verification processes to ensure accuracy and objectivity.



GLOBAL TEAM OF ANALYSTS

Analysts with in-depth thematic and sector-specific experience spread across EMEA, the Americas & APAC.



FOCUS ON STAKEHOLDER ENGAGEMENT

Extensive company and stakeholder dialogues.

Data as of January 2023. All figures are approximate.



[ISS-ESG.COM](https://www.iss-esg.com)

Americas: +1.646.680.6350
Asia: +65.6830.7838
Australia: +61.2.8048.3999
Europe: +44.20.3192.5799
Europe (Germany): +49.89.462.248.100
Japan: +81.3.5217.7888

SUCCEED WITH ISS ESG SOLUTIONS

Email sales@iss-esg.com to learn more.

ISS ESG is the responsible investment arm of Institutional Shareholder Services Inc., the world's leading provider of environmental, social, and governance solutions for asset owners, asset managers, hedge funds, and asset servicing providers. With more than 30 years of corporate governance expertise and 25 years of providing in-depth responsible investment research and analytics, ISS ESG has the unique understanding of the requirements of institutional investors. With its comprehensive offering of solutions, ISS ESG enables investors to develop and integrate responsible investing policies and practices, engage on responsible investment issues, and monitor portfolio company practices through screening solutions. It also provides climate data, analytics, and advisory services to help financial market participants understand, measure, and act on climate-related risks across all asset classes. In addition, ISS ESG delivers corporate and country ESG research and ratings enabling its clients to identify material social and environmental risks and opportunities.

This document and all of the information contained in it is the property of Institutional Shareholder Services Inc. ("ISS") or its subsidiaries. The Information may not be reproduced or disseminated in whole or in part without prior written permission of ISS. ISS MAKES NO EXPRESS OR IMPLIED WARRANTIES OR REPRESENTATIONS WITH RESPECT TO THE INFORMATION.