

# MSCI ESG business Involvement screening research

FROM MSCI ESG RESEARCH LLC

MSCI ESG Business Involvement Screening Research is a screening service that enables institutional investors to manage environmental, social and governance (ESG) standards and restrictions reliably and efficiently. Managers, advisors and asset owners can access screening research through the online MSCI ESG Manager platform or a data feed to satisfy client investment guidelines, implement client mandates, and to manage potential ESG portfolio risks.

## Key features and benefits

### Broad coverage universe:

MSCI ESG Business Involvement Screening Research allows investors to identify all global publicly-traded companies involved in activities such as the production of controversial weapons, tobacco products, or those that violate religious screening mandates such as Catholic or Islamic Values.

### Comply with Risk Management standards:

With broad coverage of companies and issues as well as MSCI's robust security data infrastructure, MSCI ESG Business Involvement Screening Research ensures no securities are missed.

### Manage legislative requirements:

Using our screening service, investors can comply with sanctions on investments in regions such as Sudan and Iran, and with international conventions on land mines and cluster munitions.

### Availability on multiple platforms:

MSCI ESG Business Involvement Screening Research is available on our interactive online platform, ESG Manager and is also integrated within MSCI's BarraOne and Barra PortfolioManager, Factset, and Style Research.

### Reduce costs with automated integration:

Data feeds can be integrated into OMS, trading, compliance systems such as APL, Charles River, Latent-Zero, Sentinel, Advent-Moxy, ITG-MacGregor and Vestmark.

### Experienced global team:

MSCI ESG Business Involvement Screening Research draws on over 40 years' combined experience based on KLD, IRRRC and Innovest, which became part of MSCI following its acquisition of RiskMetrics in June 2010.

Order	Factor Name	Operator	Criteria
	USCCB - Abortion	=	True
	USCCB - Contraceptives	=	True
	USCCB - Exclusion Tie	=	True
	USCCB - Landmines	=	True
	USCCB - Predatory lending	=	True

**Build Screen:** Factor Selection

Search for Factors:

Categories: Carbon and Fossil Fuel, Catholic, USCCB, USCCB Exclusion, Child Labor, Defense and Weapons, Diversity, ESG Impact Monitor

Catholic > USCCB > USCCB Exclusion Factors

- Factor Name <
- USCCB - Defense and Weapons
- USCCB - Discrimination
- USCCB - Exclusion Tie
- USCCB - Landmines
- USCCB - Predatory lending
- USCCB - Stem cells

Order	Factor Name	Operator	Criteria
	Alcohol - Any Tie	=	True
	Alcohol Licensor	=	True
	Alcohol - Maximum Total Revenue	>=	0
	Alcohol - Ownership by an Alcohol Company	=	True
	Alcohol - Ownership of an Alcohol Company	=	True
	Alcohol Distributor	=	True
	Alcohol Producer	=	True
	Alcohol Retailer	=	True

**Run Screen:** View Results

Company Name	Ticker	CUSIP	SEDOL	ISIN	Country	ALC_DISTRIB	ALC_LICENS	ALC_OWN_BY	ALC_OWN_OF	ALC_PRODU	ALC_RETAILER
1.800.FLOWERS.COM, INC.	FLWS	69243Q106	2444123	US68243Q1067	US						T
13 Jul Plantaze ad Zootopica	PLAP		B408397	MEPLAPRA0P...	ME						T
7 Eleven Malaysia Holdings Bhd	SEM		BMH0581	MYL5250C0005	MY						T
Abrau-Durso OAO	ABRD		B7Y0806	RU000A0J85T7	RU					T	
ACCIONA S.A.	ANA	004326104	5579107	ES0125220311	ES					T	
ACCOR S.A.	AC	00435F200	5852842	FR0000120404	FR						T
Accortia Golf Co., Ltd.	2131	00436B109	B1FQWP8	JP3108450002	JP						T
Acestele Philis Hotel Corp	ACE		6084967	PHY2063J1017	PH						T
ADM Hamburg Aktiengesellschaft	OEL		4555666	DE0007269003	DE			T			
Adnams PLC	ADB		0007584	GB0000075845	GB					T	T
ADRS GRUPA d.d.	ADRS-R-A		B1L9YX4	HRADRSR0A0...	HR						T
ADVALDIS SPOLKA AKCYJNA W UPADK	ADS		5351673	PLMBRST000...	PL	T					

## Product overview

MSCI ESG Business Involvement Screening Research supports the integration of ESG, business involvement, and company involvement guidelines into portfolio management and is available on the MSCI ESG Manager platform.

Additional bespoke coverage for further issues, screening criteria or universes of coverage is available through MSCI ESG Research's Custom Research team.

MSCI ESG Business Involvement Screening Research is used for:

- Portfolio screening for religious, ethical and other relevant social and environmental criteria.
- Portfolio screening for ESG controversies and allegations of breaches of international conventions
- Compliance with ESG guidelines, such as the UN Principles for Responsible Investment (UN PRI).
- Integration of client ESG investment and divestment mandates, such as sanctions on investments in Sudan and Iran, and on involvement with the production of land mines and cluster munitions.

## Screening examples






- **Cluster munitions:** MSCI ESG Research's Cluster Munitions screen identifies companies involved in the production of cluster munitions, components, and delivery platforms.
- **Landmines:** MSCI ESG Research's Landmines Screen identifies companies involved in the production of anti-personnel landmines, components, and anti-vehicle landmines.
- **Biological/chemical weapons:** MSCI ESG Research's Biological / Chemical Weapons Screen identifies companies that manufacture biological or chemical weapons (or critical components of biological / chemical weapons), which are defined as weapons that use pathogens such as viruses, bacteria, and disease-causing biological agents, toxins, or chemical substances that have toxic properties that kill, injure, or incapacitate.
- **Depleted uranium weapons:** MSCI ESG Research's depleted uranium research identifies publicly traded companies that manufacture weapons, ammunition, and armor made with depleted uranium (DU) and DU alloys. DU is a by-product of the uranium-enrichment process used to make nuclear weapons and nuclear-reactor fuel.

## MSCI ESG Business Involvement Screening Research covers the following factors:

### Extensive Equity and Fixed Income coverage:

For many screens includes global equity issuers, plus selected fixed income coverage for most screens including:

- Bond-issuing subsidiaries
- Corporate bond issuers
- Government-owned entities that operate as corporations

 <p><b>Business involvement</b></p>	 <p><b>Global sanctions</b></p>	 <p><b>Controversies and global norms</b></p>	 <p><b>Carbon</b></p>	 <p><b>Sustainable Impact (Positive screening)</b></p>
<ul style="list-style-type: none"> <li>• Abortion &amp; contraceptives</li> <li>• Adult entertainment</li> <li>• Alcohol</li> <li>• Animal welfare</li> <li>• Catholic, islamic and other religious screens</li> <li>• Defense &amp; weapons</li> <li>• For profit prisons</li> <li>• Fur</li> <li>• Gambling</li> <li>• Genetic engineering</li> <li>• Nuclear power</li> <li>• Palm oil</li> <li>• Predatory lending</li> <li>• Stem cell</li> <li>• Tobacco</li> </ul>	<ul style="list-style-type: none"> <li>• Burma</li> <li>• Cuba</li> <li>• Iran</li> <li>• North Korea</li> <li>• Northern Ireland</li> <li>• Russia/Ukraine</li> <li>• Sudan</li> <li>• Syria</li> <li>• OFAC Cases</li> <li>• SEMA Cases</li> <li>• Venezuela</li> </ul>	<ul style="list-style-type: none"> <li>• Child labor</li> <li>• Employee safety</li> <li>• Diversity</li> <li>• Employee relations</li> <li>• Union relations</li> <li>• Human rights</li> <li>• Environment</li> <li>• Customer relations</li> <li>• Marketing</li> <li>• Product safety</li> <li>• UN global compact</li> <li>• International Labor Organization (ILO)</li> <li>• UN guiding principles on business and human rights</li> </ul>	<ul style="list-style-type: none"> <li>• Artic oil</li> <li>• Direct &amp; indirect carbon emissions and intensity</li> <li>• Fossil fuel reserves</li> <li>• Utilities / Power generation</li> <li>• Thermal coal extraction</li> <li>• Oil sands extraction</li> </ul>	<ul style="list-style-type: none"> <li>• Environmental impact metrics</li> <li>• Social impact metrics</li> </ul>

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## About MSCI ESG Research products and services

MSCI ESG Research products and services are provided by MSCI ESG Research LLC, and are designed to provide in-depth research, ratings and analysis of environmental, social and governance-related business practices to companies worldwide. ESG ratings, data and analysis from MSCI ESG Research LLC. are also used in the construction of the MSCI ESG Indexes. MSCI ESG Research LLC. is a Registered Investment Adviser under the Investment Advisers Act of 1940 and a subsidiary of MSCI Inc.

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