

# ESG data and solutions from Refinitiv

Research with confidence | Integrate with ease

Issues such as climate change, diversity, human rights, “license to operate,” business ethics and corporate governance are at the forefront of public and political attention. Investors are increasingly demanding that these issues are factored into their portfolios, and financial professionals are differentiating their services using environmental, social and governance (ESG) criteria.

## WHY REFINITIV FOR YOUR ESG RESEARCH AND ANALYSIS?

With Refinitiv, you can easily integrate ESG factors into portfolio analysis, equity research, screening or quantitative analysis, so you can more effectively meet investment mandates and identify risks across your portfolios. Access all the data and tools you need in one place including:

### Data

- Transparent ESG data and scores for over 7,000 global companies with data since FY2002, longer than other provider
- Customized Analytics, Scores and Ranks to meet specific ESG requirements
- 400+ ESG data points and 70+ ESG analytics – all standardized so you can easily benchmark companies
- Real-time ESG signals from 75,000 sources, for portfolio construction and company monitoring in partnership with Truvalue Labs
- Green bonds data from the Climate Bonds Initiative (CBI)

### Tools and Analytics

- Screening tools to help you efficiently mitigate risk and find alpha
- Portfolio analytics and risk-monitoring tools
- Idea-generation tools to screen for ESG mandates and drill down into company-specific metrics
- Carbon Data and Estimate models that are both patented and fully transparent – providing a CO2 estimated value when a reported value is not available
- Carbon footprint monitoring and reporting to meet regulatory requirements
- Indices including ESG, Diversity and Inclusion, Fossil Free and more!

### ACCESS THE DATA

Our ESG data is available through Eikon, Excel® add-in, Datastream®, Datastream Data Loader (DDL), QA Direct® and the Elektron Data Platform Cloud API.

#### ESG Data on Eikon

ESG Data on Eikon allows for **seamless integration** of financial and nonfinancial data sets, allowing you to see the full picture. Eikon allows for **full transparency** into our ESG data, with click-to-source capabilities throughout the product.

Find out more about Eikon: [refinitiv.com/eikon](https://refinitiv.com/eikon)

#### ESG Data via Elektron Data Platform Cloud API

We are amongst the first ESG providers to use the cloud to deliver our ESG data. This enables you to **reduce the need for significant on-site infrastructure** and achieve **greater operational efficiency**.

The Elektron Cloud API can fully align with your organization's cloud strategy, delivering data to whichever provider you are working with.

#### Get ESG Custom Reports

Our ESG Scorecard provides a comprehensive snapshot of a company's environmental, social and governance performance over the last five fiscal years.

## Integrate ESG Into Your workflow

### Risk Assessment and Mitigation

We provide simple tools so you can efficiently carry out negative screening to identify companies involved in activities such as alcohol, tobacco and armaments.

In Eikon, select the customizable criteria and quickly narrow down your list of companies to offer insight into risk exposure faster than ever before. On the same Eikon platform, you can perform portfolio optimization against ESG metrics.

Our Cloud API solution provides you with ESG data to carry out negative screening and risk exposure on the companies in your portfolio or watchlist.

### Monitor Your Coverage Universe

Quickly spot trends and make comparisons within your portfolio of companies.

In Eikon, load your coverage universe and easily configure the ESG criteria so you can see aggregated ESG measures per sector or region on any metric, on the fly.

Compare your coverage universe with our ESG data which is fed into your financial systems via our Cloud API, allowing you to see how a company performs on over 400 ESG metrics.

### Generate Investment Ideas

Combine ESG metrics with other factors such as StarMine® quant model scores to identify investment opportunities. Screen your coverage universe by easily aligning your ESG mandates with the associated filters.

Dive into the detail for any number of the 7,000+ companies with our transparent ESG views in Eikon. With a click of a button, compare companies side by side against key metrics.

Use our Cloud API to integrate ESG data with your proprietary and other third-party data to use within your analysis and investment decision-making process.

### Real-Time and Materiality Component

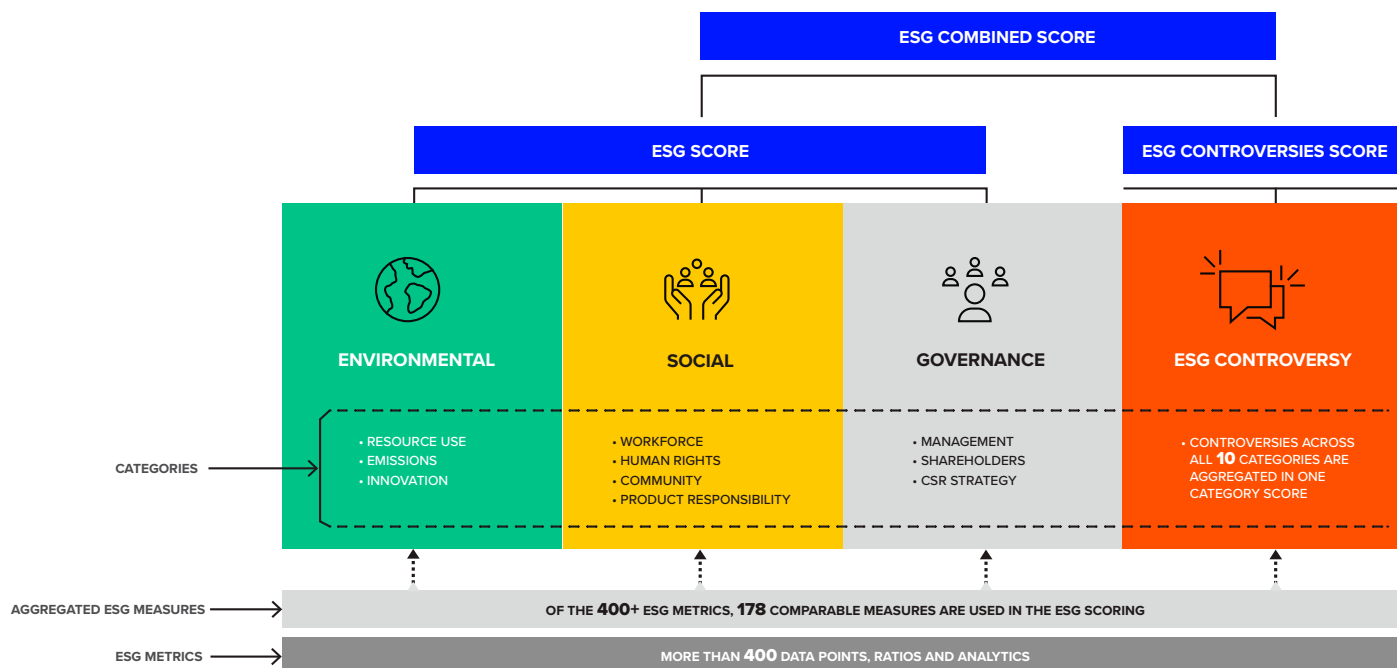
Refinitiv and Truvalue Labs bring to you Insight360 SASB Edition, an ESG data platform that is comparable, timely and financially material. Leverage the Sustainability Accounting Standards Board (SASB)'s ESG Materiality Framework to find opportunities and manage risks. The Insight360 app is integrated into Eikon and combines the power of Truvalue Labs' timely ESG insights with Refinitiv's robust set of ESG data, all filtered by the SASB materiality standards. Find opportunities, manage risks and build portfolios to meet any ESG strategy.

### Meet Regulatory or Voluntary Reporting Requirements

Meet voluntary commitments or regulatory reporting requirements using our ESG data.

Eikon's Portfolio Analytics tool helps you measure and report on aggregated ESG scores or the carbon footprint of your portfolio.

Our ESG Cloud API allows you to review 70% of global market cap, ensuring you are reporting on regulatory issues relating to your portfolio.



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DATA IS JUST  
THE BEGINNING