ESG Metric Identifier System – Quick Reference Guide

This document briefly explains the ESG Metric Identifier System designed for intuitive and consistent labeling of ESG metrics. It helps quickly identify key details from each metric.

Identifier Structure:

The ESG metric identifier consists of an alphanumeric code structured as follows:

[Provider][Category][Data Type][Theme][Specific Indicator]

- **Provider (Letters)**: The first 3–4 letters identify the data provider.
  - clar: Clarity.ai
  - nasd: Nasdaq
  - sust: Sustainalytics
  - sant: Grupo Santander

- **Category (2 digits)**:
  - 00: Flags
  - 01: ESG Scores & Ratings
  - 02: Controversies
  - 03: Exposure
  - 04: Group Policies

- **Data Type (2 digits)**:
  - 00: Boolean (true/false)
  - 01: String (text)
  - 02: Integer (whole number)
  - 03: Float (decimal number)
  - (Other numeric codes represent additional specific types)

- **Theme (3 digits)**:
  - Numeric codes grouping related ESG themes. Examples:
    - 001: Animal Welfare & Testing
    - 003: Nuclear Weapons
    - 004: Nuclear Energy
    - 011: Fossil Fuels
    - 027: Gambling
    - 034: Climate (carbon, GHG)

- 037: Governance & Ethics

(See comprehensive theme index for all codes.)

- **Specific Indicator (1 digit)**:
  - Indicates additional specificity:
    - Exposure Metrics ending _prod: 1
    - Exposure Metrics ending _part: 0
    - Critical or High-level controversies: 3
    - General controversies: 5
    - Flags (e.g., Bond flags, Compliance status): 7

Example Identifier:

- sust02000033
  - Provider: Sustainalytics (sust)
  - Category: Controversy (02)
  - Data Type: Boolean (00)
  - Theme: Animal welfare/testing (001)
  - Specific Indicator: Critical controversy (3)

Usage:

Analysts, auditors, and management can quickly interpret ESG metrics using this identifier, clearly understanding the source, category, data type, theme, and severity or specific detail of each metric at a glance.

This concise system streamlines internal and external ESG analysis, reporting, and auditing processes.