

Institutional Client-Designed Indexes

► Evolving Client-Driven Index Solutions for Asset Owners

The World is Changing. So Are Investment Strategies.

For pension funds, endowments and other institutional owners of assets, changes in market structure, the low-carbon transition, stakeholder pressures, and regulatory, geopolitical and technological developments can have a significant impact on risk and return.

As their investment strategies evolve, asset owners may desire to evolve their index solutions too, and they may need data and insights to help them understand the effect of their potential modifications.



MSCI Institutional Client-Designed Indexes

Our Institutional Client-Designed Indexes (iCDIs) enable asset owners to evolve their design over time to remain suitable to their investment strategy. As you adapt your strategy in response to new insights and challenges, you can adapt your index too by adjusting its methodology accordingly. iCDIs aim to eliminate or reduce the need to switch indexes following a shift in strategy, thereby enhancing flexibility while helping you to cut costs, reduce risk and ease administrative burdens.

► An index solution built for your strategy

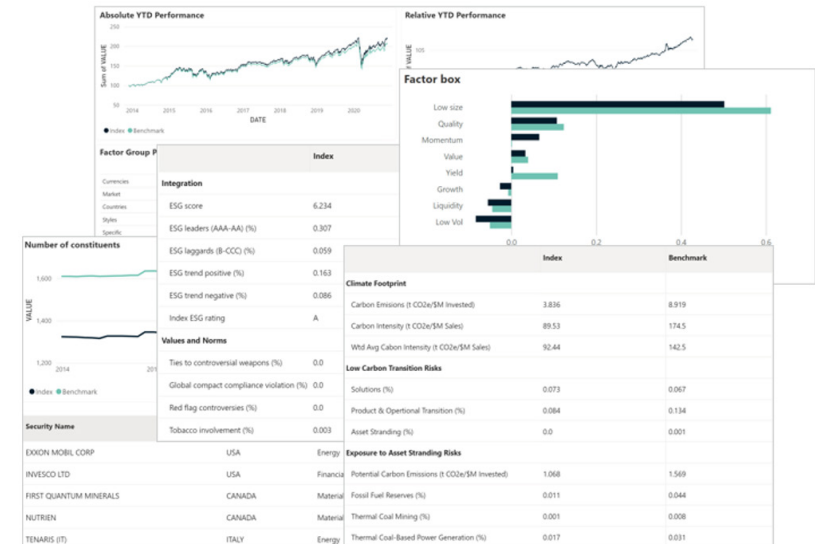
iCDIs enable you to translate your investment requirements into index criteria. MSCI researchers and index solutions specialists are available to provide support as you develop factor, thematic or ESG and climate index methodologies for your tailored equity index based on your specific investment objectives, constraints and preferences.

► Supported by the depth of MSCI's index data

iCDIs leverage MSCI's more than 50 years of leadership and expertise in index construction, maintenance and data to deliver investable, transparent and replicable custom indexes that you can design to meet your passive investment mandates, either internally or externally managed.

► Insight to drive actions

Monitoring, insights and scenario analysis can help you pinpoint drivers of risk and performance and adjust the methodology of your index as needed for its continuous suitability for your investment strategy.



Take control of your index

- Investable, transparent and replicable custom indexes designed by you utilizing the rigor and highest standards for precision that characterize MSCI indexes
- Ongoing support from dedicated MSCI Solutions Research teams
- Reporting and insights to help you analyze the current characteristics of your iCDI and assess the potential need for change
- Institutional-grade reporting to help you share progress with stakeholders across your organization.



About MSCI Inc.

MSCI is a leading provider of critical decision support tools and services for the global investment community. With over 50 years of expertise in research, data and technology, we power better investment decisions by enabling clients to understand and analyze key drivers of risk and return and confidently build more effective portfolios. We create industry-leading research-enhanced solutions that clients use to gain insight into and improve transparency across the investment process.

To learn more, please visit www.msci.com.

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