



# MSCI Inc. Quarterly Update

October 25, 2022

MSCI remains well-positioned to deliver mission-critical tools, solutions and content investors need to build better portfolios for a better world.

## Addressing the Needs of Clients and Client Segments

- Expanding ESG Fixed Income Index family in China: We recently announced the launch of the Bloomberg MSCI China ESG Index Suite, which includes nine Environmental, Social and Governance (ESG) indices. This is the first Bloomberg MSCI index suite that tracks the performance of the RMB-denominated bond and USD-denominated Chinese bond markets, while incorporating ESG and Socially Responsible Investment (SRI) considerations.
- New Client-Driven Index Solutions for Asset Owners: We recently announced the launch of Institutional Client-Designed Indexes (iCDI), which allow institutional asset owners to customize indexes that underpin their investment strategies. Supported by data and analysis from MSCI's solutions research team, asset owners can select the criteria for an iCDI, which can target ESG, Climate, Factor, Thematic or other considerations.
- RCA Data Integration to Snowflake: MSCI Real Capital Analytics Data Integration (DI) is now available on Snowflake, a cloud-based platform allowing clients access to the Real Capital Analytics data in raw format, to directly feed this data into their own systems and/or alongside MSCI data. In addition to this launch, MSCI Real Assets released two new datasets available via the DI offering; Investor Data and Transaction Data, currently some of the most sought after data within commercial real estate. The two new DI datasets, Investor Data and Transaction Data, will allow clients such as hedge funds, brokers, and research firms, access to more than a million rows of raw data.
- Launch of New Sustainable Investment % Index Level Metrics: During the quarter, MSCI released a product that helps clients with their sustainability-related disclosure requirements under EU Markets in Financial Instruments Directive (MiFID II). It provides Sustainable Investment Metrics for a set of MSCI Indexes. These metrics are calculated based on MSCI ESG Research's "Navigating Sustainability Preferences under the New MiFID II Rules" guide, which outlines a potential approach to defining metrics for measuring sustainable investments.

## Launching Innovative Solutions

- Launch of Risk Insights: In September, we launched Risk Insights, the first module of a new analytics platform, MSCI Insights, that calculates, stores and delivers a broad range of risk measures to help investors identify trends and respond to rapid changes in markets. MSCI Risk Insights automates many analysis and reporting tasks usually performed manually by risk analysts. This automation better allows investors to quickly and effectively understand the overall level of risk in their portfolios, how that risk has changed, what factors may have caused the changes, and what actions can be taken to achieve their investment goals.

- Global Intel – Trend analysis for Market Insights: During the quarter, we launched Market Insights to allow investment teams, researchers, and advanced users the ability to compare, via an interactive environment, market segment performance across multiple measures, property types and currencies. Users can also save different analyses for future reference and view reports directly.

## **Enhancing Capabilities**

- Strategic Investment in Evora Global: MSCI, alongside Farview Equity and Bridges Fund Management, has invested in Evora Global, a British company that works with influential names in real estate. The combination of Evora’s tools for climate data management and advisory services, together with MSCI’s robust climate risk models and indexes, will help to improve the flow of critical decision data and accelerate the adoption of climate standards and thereby strengthen the global real asset investment process. MSCI is committed to providing critical decision support tools that help investment managers to build better portfolios and, in this collaboration with Evora, we will better serve the evolving needs of our shared and new clients.
- Enhancing Multi Asset Risk Solutions with Amundi Technology: MSCI and Amundi Technology, a business line dedicated to technology products and services, are partnering to integrate MSCI risk analytics in Amundi’s offering to provide robust risk data solutions to Amundi’s clients. This enhanced offering will support asset managers and institutional investors as they seek reliable, open and innovative technology solutions and includes MSCI’s RiskManager data and analytics. This offering will also provide access to enhanced functionalities across a broad range of publicly traded instruments and private assets including Value-at-Risk simulation methodologies, robust stress tests, market exposure and sensitivity analysis.

## **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](http://www.msci.com).

## **FORWARD-LOOKING STATEMENTS**

This quarterly update contains forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995. These forward-looking statements relate to future events or to future financial performance and involve known and unknown risks, uncertainties and other factors that may cause MSCI’s actual results, levels of activity, performance or achievements to be materially different from any future results, levels of activity, performance or achievements expressed or implied by these statements. In some cases, you can identify forward-looking statements by the use of words such as “may,” “could,” “expect,” “intend,” “plan,” “seek,” “anticipate,” “believe,” “estimate,” “predict,” “potential” or “continue,” or the negative of these terms or other comparable terminology. You should not place undue reliance on forward-looking statements because they involve known and unknown risks, uncertainties and other factors that are, in some cases, beyond MSCI’s control and that could materially affect actual results, levels of activity, performance or achievements.

Other factors that could materially affect actual results, levels of activity, performance or achievements can be found in MSCI’s Annual Report on Form 10-K for the fiscal year ended December 31, 2021 filed with the Securities and Exchange Commission (“SEC”) on February 11, 2022 and in quarterly reports on Form 10-Q and current reports on Form 8-K filed or furnished with the SEC. If any of these risks or uncertainties materialize, or if MSCI’s underlying assumptions prove to be incorrect, actual results may vary significantly from what MSCI projected. Any forward-looking statement in this quarterly update reflects MSCI’s current views with respect to future events and is subject to these and other risks, uncertainties

and assumptions relating to MSCI's operations, results of operations, growth strategy and liquidity. MSCI assumes no obligation to publicly update or revise these forward-looking statements for any reason, whether as a result of new information, future events, or otherwise, except as required by law.