

## DATA SETS GUIDE

### Delivering High-quality And Actionable Environmental, Social, And Governance Data To Partners Globally

ISS ESG offers expertise across a full range of environmental, social, and governance issues, having worked with leading asset owners and asset managers over the past 25 years to design tailored solutions and develop innovative products.

ISS ESG works closely with its partners to provide access to high-quality ESG data that investors can use to generate a more complete picture of portfolio risks and opportunities.

Investors can elevate their investment processes by using ISS ESG data:

- As input for investment models, internal dashboards or scorecards, customized ESG scores, and product development
- As a signaling device to help identify companies or industries in need of further analysis
- For benchmarking purposes
- To help support alignment with regulatory requirements



### ESG INVESTING IS ON THE RISE

The total amount of globally managed sustainable assets rose by more than 15% between 2018 and 2020, reaching \$35.3 trillion\*. This growth is expected to continue at double-digit rates, as companies and investors work together to fully integrate policies and practices and create long-term value.

\*Source: GSIA Global Sustainable Investment Review 2020

## EXPERIENCE SECURE AND RELIABLE DATA ACCESS

ISS ESG provides reliable and detailed daily data sets through secure FTP to third party platforms for onward use by end clients. Cloud access and API connectivity is forthcoming soon.



# A COMPLETE ECOSYSTEM OF ESG DATA SETS TO SUPPORT YOUR INVESTMENT OBJECTIVES

Completed ● Prioritized for development ●

## CLIMATE SOLUTIONS

### ● CARBON RISK RATING

Company future carbon performance based on sector-specific indicators and risk profiles.

### ● CLIMATE CORE

Company Scope 1, 2, & 3 emissions, raw data, and carbon intensity metrics representing the GHG emissions per million USD/EUR of revenue.

### ● CLIMATE IMPACT

Company derived metrics and benchmarks by geographical and sector classifications. Includes short- and long-term physical risk, peer emissions intensity, and climate scenario budgets.

### ○ CLIMATE PHYSICAL RISK

Company physical risk metrics, also included in the Climate Impact Data set.

### ○ CLIMATE TRANSITION RISK

Company Transition Value-at-Risk (TVaR) provides forward-looking returns-based analysis leveraging EVA (Economic Value Added) methodology and company asset-level data.

### ○ POTENTIAL AVOIDED EMISSIONS

Data for the potential avoided emissions of investments (e.g. companies, infrastructure and Green Bonds).

### ○ SOVEREIGN EMISSIONS

Sovereign emissions data including Total Country Emissions and Government Emissions along with intensity factors for per million GDP and Debt.

### ○ NET ZERO

Company climate data to support Net Zero readiness, considering current and potential emissions performance, fossil fuel exposure, climate mitigating revenue, and target setting.

### ○ EBA PILLAR 3

Provides a comprehensive set of robust datapoints that help EU banks meet the disclosure requirements of EBA Pillar 3 in an easily accessible and, if needed, customizable way.

## ESG RATINGS & RANKINGS

### ● ESG CORPORATE RATING

Company sustainability performance based on in-depth ESG criteria with a rigorous, robust, and rules-based methodology.

### ○ ESGF RATING

Company ESGF (ESG + Financial) rating that provides a holistic assessment of company performance.

### ● ESG COUNTRY RATING

Country sustainability performance and controversy assessment for EU, OECD & BRICS countries, as well as all major sovereign issuers from the Americas, Europe, Asia, Africa, and Oceania.

### ● GOVERNANCE QUALITYSCORE

Company governance disclosure practices delivered through a data-driven scoring and screening solution.

### ● ENVIRONMENTAL & SOCIAL DISCLOSURE QUALITYSCORE

Company environmental & social disclosure practices delivered through a data-driven scoring and screening solution.

### ○ WATER RISK RATING

Company exposure to freshwater-related risks and water-related operational performance.

### ○ ESG MUNI QUALITYSCORE

US municipal bond sustainability performance and underlying data for all 50 states at GEO.id level covering cities/towns, counties, and school districts.

### ○ BIODIVERSITY IMPACT ASSESSMENT TOOL

Company impact on biodiversity risk measured through Potentially Disappeared Fraction of Species (PDF) and Mean Species Abundance (MSA).

## ESG FUND RATING

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### ● ESG FUND RATING

ESG performance for funds globally includes corporate and country ratings, controversies, SDG alignment, climate data, controversial weapons and other screening, and voting analytics.

### ● ESG FUND RATING (FUND DISTRIBUTION PLATFORM)

ESG performance for funds includes top indicators and 5 packages: Climate and Energy, Ratings and Rankings, Regulatory Solutions, Screening and Controversies, and SDG Impact.

## REGULATORY SOLUTIONS

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### ○ REGULATORY SUSTAINABLE INVESTMENT SOLUTION

Company data to support EU disclosure frameworks (SFDR) and non-EU principle-based disclosure regimes (US, Canada, Hong Kong, Taiwan, India & the Philippines).

### ○ SFDR PRINCIPAL ADVERSE IMPACT SOLUTION

Company and sovereign data to meet the EU Sustainable Finance Disclosure Regulation (SFDR) reporting on Principal Adverse Impacts (PAI).

### ○ EU TAXONOMY ALIGNMENT SOLUTION

Company measure of taxonomy alignment across 100+ activities and 1,000+ factors, which includes a Do No Significant Harm indicator.

### ○ EUROPEAN ESG TEMPLATE SOLUTION

Company data to support mandatory European ESG Template (EET) disclosure requirements.

### ○ ESG LABELS & STANDARDS SOLUTIONS

Company data in multiple datasets to meet global (UNGC) and regional (France, DACH, Rest of World) labels and standards. United States Conference of Catholic Bishops (USCCB) dataset also available.

### ○ BENCHMARK ESG DISCLOSURE DATA SET

Company and sovereign data to help benchmark index providers meet EU ESG reporting and disclosure obligations.

## ESG RAW DATA

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### ● ENVIRONMENTAL RAW DATA

A comprehensive range of raw datapoints - spanning topics such as climate change and natural resources - with no additional assessment or scoring overlay.

### ● SOCIAL RAW DATA

An equally powerful set of raw social datapoints covering themes like business ethics and labor, health, and safety.

## GOVERNANCE RAW DATA

### ○ DIRECTOR DATA

Director data set to evaluate board independence, skills, diversity, key committee positions, attendance, ownership, compensation, meeting attendance, and more.

### ○ DIRECTOR DATA W/ ETHNICITY

Adds ethnicity data to the Director Data set.

### ○ EEO-1 DATA

Granular workforce demographic data disclosed by private sector companies in the U.S. with 100 or more employees and federal contractors with 50 or more employees that meet certain criteria.

### ○ BOARD & NEO DIVERSITY

Diversity data for board members and named executive officers.

### ○ EXECUTIVE COMPENSATION ANALYTICS

CEO and NEO compensation and benchmarking data for North American, EMEA, Australian, and New Zealand companies.

### ○ VOTING ANALYTICS

Global shareholder and management proposals, shareholder proponent data, voting results, and institutional voting records.

## IMPACT & UN SDG SOLUTIONS

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### ● SDG IMPACT RATING

Company impact (positive and negative) on the 17 United Nations' Sustainable Development Goals across products and services, operations management, and controversies.

### ○ SDG SOLUTIONS ASSESSMENT

Company product and service portfolio impact by revenue (positive and negative) on the United Nations' Sustainable Development Goals across 15 sustainability objectives.

## SCREENING & CONTROVERSIES

### NORM-BASED RESEARCH ISSUERS

Company adherence to international norms on human rights, labour standards, environmental protection, and anti-corruption as set out in the UN Global Compact and the OECD Guidelines.

### NORM-BASED RESEARCH CASES

Individual controversy case data supporting company data set.

### CONTROVERSIAL WEAPONS ISSUERS

Company involvement in banned or controversial weapons.

### CONTROVERSIAL WEAPONS CASES

Individual controversial weapon case data supporting company data set.

### SECTOR-BASED SCREENING

Company involvement in sectors and products such as alcohol, animal welfare, cannabis, for-profit correctional facilities, gambling, pornography, and tobacco.

### GLOBAL SANCTIONS SCREENING

Companies with ties to countries of concern and/or countries under UN, U.S. or EU sanctions.

### COUNTRY CONTROVERSY ASSESSMENT

Sovereign exposure to various controversies, including alignment with international norms and conventions.

### ENERGY & EXTRACTIVES SCREENING

Company involvement in the extraction of fossil fuels, and the generation of power from fossil fuels, nuclear, and renewable sources.

### MODERN SLAVERY SCORECARD

Company forward-looking assessments and actionable insights on modern slavery risks, risk mitigation, and exposure to modern slavery controversies.

## FINANCIAL MANAGEMENT

### EVA FINANCIAL MANAGEMENT

Company EVA (Economic Value Added) data to measure, analyze, project, and value a firm's underlying economic profit rather than its accounting profit.

## CYBER

### CYBER RISK SCORE

Company predictive scores that forecast the risk of future breach events and monitor the risks of third-party/supply chain relationships.

## THE ISS ESG DIFFERENCE



### INDUSTRY PIONEER

Pioneered ESG ratings, Norm-Based Research and portfolio climate risk assessments.



### QUALITY FIRST

Strict data verification processes to ensure accuracy and objectivity.



### GLOBAL TEAM OF ANALYSTS

Analysts with in-depth thematic and sector-specific experience spread across EMEA, the Americas & APAC.



### FOCUS ON STAKEHOLDER ENGAGEMENT

Extensive company and stakeholder dialogues.



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## SUCCEED WITH ISS ESG SOLUTIONS

Email [partnerships@iss-esg.com](mailto:partnerships@iss-esg.com) to learn more.

ISS ESG solutions enable investors to develop and integrate responsible investing policies and practices, engage on responsible investment issues, and monitor portfolio company practices through screening solutions. It also provides climate data, analytics, and advisory services to help financial market participants understand, measure, and act on climate-related risks across all asset classes. In addition, ESG solutions cover corporate and country ESG research and ratings enabling its clients to identify material social and environmental risks and opportunities.

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