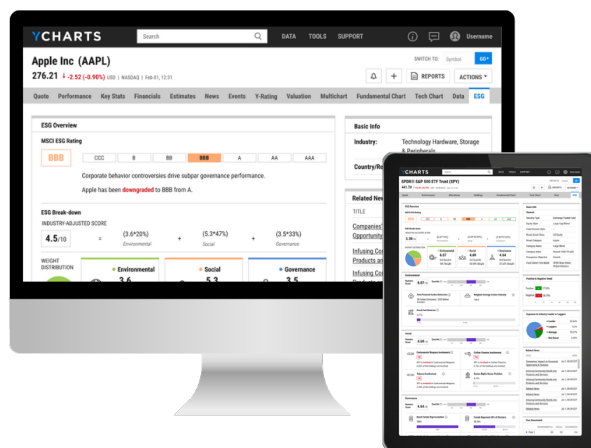


Make Smarter Investment Decisions with ESG Data

Environmental, Social & Governance Scores & Ratings

Data/Stats

- ESG data coverage for 8,000 equities, 18,000+ mutual funds, and 3,000 ETFs domiciled in the US & Canada
- 30+ data points including ESG ratings, industry-adjusted scores, and underlying ESG metrics such as fossil fuel involvement, carbon emissions, and board independence
- ESG data is sourced from MSCI Global and updated daily to reflect the latest information and score/rating changes



Key Benefits

- **Attract new clients and nurture relationships** by incorporating ESG into your sales strategy & long-term value creation
- **Build portfolios that align with client values** using ESG ratings, scores & underlying data points such as industry ties
- **Elevate your idea generation** with ESG inputs alongside performance, risk, and fee metrics
- **Identify and avoid stocks, mutual funds & ETFs** bearing significant ESG risks
- **Build a holistic view of ESG risks** at the index, sector, industry, and security levels

ESG Data Analysis

Symbol	Name	MSCI ESG Rating (AAA)	MSCI ESG Score	Fossil Fuel Reserves	Fossil Fuel Reserves (%)	Tobacco Total - Any Tye	Tobacco Investment (%)	Weapons - Any Tye (%)	Weapons Investment (%)
ZFPWF	Zurich Insurance Group AG	AA	8.40	No	0.00%	No	0.00%	No	0.00%
XOM	Exxon-Mobil Corp	BBB	4.40	Yes	100.0%	No	0.00%	No	0.00%
WFC	Wells Fargo & Co	BB	4.25	No	0.00%	No	0.00%	No	0.00%
W	Wayfarer Inc	BB	2.90	No	0.00%	No	0.00%	No	0.00%
VWO	Vanguard FTSE Emerging Marke...	BBB	5.40	Yes	8.63%	Yes	7.99%	No	0.00%
VEA	Vanguard FTSE Developed Mark...	AAA	8.72	Yes	8.31%	Yes	8.15%	Yes	0.34%
SPS	United Parcel Service Inc	A	7.80	No	0.00%	No	0.00%	No	0.00%
TSL	TotalEnergies SE	A	7.10	Yes	100.0%	No	0.00%	No	0.00%
TSLA	Tesla Inc	A	7.10	No	0.00%	No	0.00%	No	0.00%
SPY	SPDR S&P 500 ETF Trust	AA	7.81	Yes	5.78%	Yes	7.11%	Yes	0.55%
SHEL	Shell PLC	AA	7.70	Yes	100.0%	Yes	100.0%	No	0.00%
MSFT	Microsoft Corp	AAA	9.80	No	0.00%	No	0.00%	No	0.00%
LSGXK	Looma Bayes Growth Y	A	6.31	Yes	1.04%	Yes	5.50%	No	0.00%
JPM	JPMorgan Chase & Co	A	7.10	No	0.00%	No	0.00%	No	0.00%
GOOG	Alphabet Inc	BBB	5.10	No	0.00%	No	0.00%	No	0.00%
ODX	VanEck Gold Miners ETF	AA	6.39	Yes	10.37%	No	0.00%	No	0.00%
FXIX	Fidelity 500 Index	AA	7.82	Yes	5.49%	Yes	6.98%	Yes	0.52%
DDGX	Dodge & Cox Stock I	A	6.45	Yes	5.64%	Yes	3.86%	No	0.00%
DOUG	Douglas Inc	BBB	5.20	No	0.00%	No	0.00%	No	0.00%
CNR	Canadian National Railway Co	AA	7.80	No	0.00%	No	0.00%	No	0.00%
BP	BP PLC	A	6.50	Yes	100.0%	Yes	100.0%	No	0.00%
AAPL	Apple Inc	A	6.10	No	0.00%	No	0.00%	No	0.00%

Coming Soon to YCharts

- Portfolio-level ESG scores and calculations
- ESG modules in tearsheets and PDF reports
- ESG visualizations for all mutual funds, ETFs & stocks
- Data set expansion

Want to see how YCharts and ESG Data can elevate your portfolio offerings & asset gathering?
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