

A Bloomberg Terminal offering

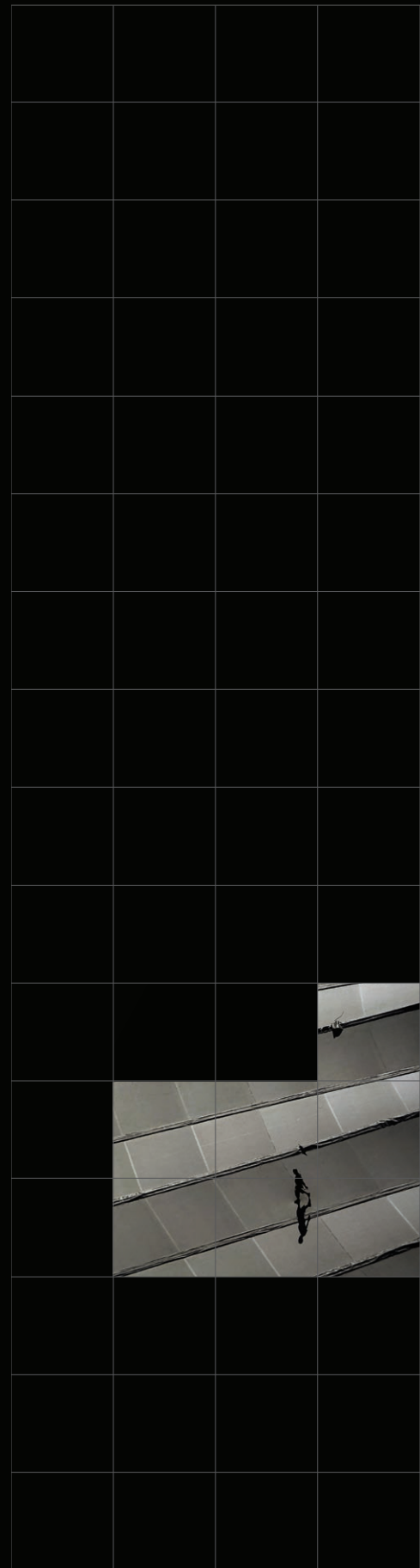
# Bloomberg for Sustainable Finance Analysis

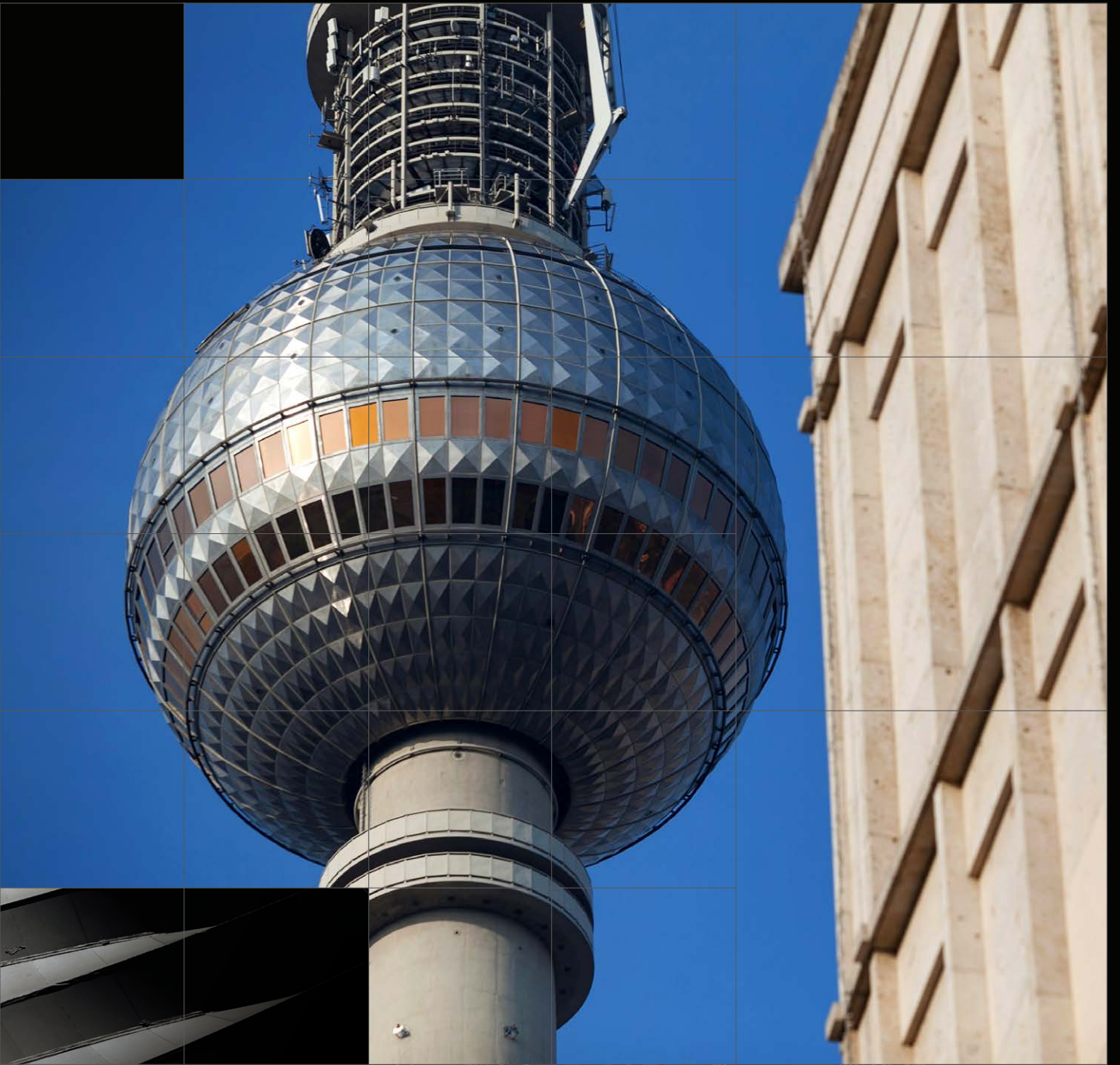


**Bloomberg**

## Contents

- 02** Introducing Bloomberg Sustainable Finance Solutions
- 03** Better identify ESG risks & opportunities
- 04** Integrate ESG risks & opportunities into fundamental analysis
- 12** Analyze, monitor & report on portfolios
- 14** Leverage fund research & index products





# Introducing Bloomberg Sustainable Finance Solutions

Conventional financial analysis is no longer enough. Long-term investors demand more. Structural and systemic shifts, such as climate change, resource scarcity, regulatory pressures and the importance of human capital and diversity increasingly pose material business risks and opportunities for issuers and investors globally. Bloomberg's Sustainable Finance Solutions offer objective, transparent and rigorous insights to help asset owners, asset managers, issuers, regulators and others capitalize on material environmental, social and governance (ESG) issues.

- Bloomberg Terminal®
- Bloomberg Enterprise Data
- Bloomberg Intelligence
- Bloomberg New Energy Finance
- Bloomberg Indices
- Bloomberg Media
- Bloomberg Industry Products

## **Bloomberg Sustainable Finance**

Bloomberg's full suite of Sustainable Finance Solutions empowers asset owners, asset managers, issuers, regulators and more to identify, analyze and capitalize on material business risks, such as climate risk and emerging sustainability opportunities, such as the low carbon energy transition.

## **Bloomberg ESG**

Bloomberg's comprehensive ESG data set, advanced analytics and news drive fundamental ESG analysis at the heart of Bloomberg Sustainable Finance products.



# Better identify ESG risks & opportunities

Bloomberg Sustainable Finance Solutions integrate ESG risk and opportunity analysis into your daily workflow. Bloomberg's ESG data on over 9,000 companies and up to 10 years of history for over 900 fields, is available as an Enterprise Data feed and is a fully integrated feature of the Bloomberg Terminal.

On the Terminal, ESG data is displayed alongside fundamental data in the same screens that investors use every day. Bloomberg supports your end-to-end workflow through ESG data, unique analysis, advanced analytics tools as well as news by a dedicated team of journalists focused on ESG issues.

As the number of ESG and sustainability-themed fund and index products grows, Bloomberg's in-depth research and analysis tools help identify the products that align with investment objectives and customize indices to best meet investor goals and asset owner mandates.

## Bloomberg Sustainable Finance Solutions:

I. Integrate ESG risks and opportunities into fundamental analysis	<ul style="list-style-type: none"><li>- Integration process and idea generation</li><li>- Security screening and selection</li><li>- Company performance analysis and scoring</li></ul>
II. Analyze, monitor and report on portfolios	<ul style="list-style-type: none"><li>- ESG exposure and performance analysis</li><li>- Portfolio-level ESG reporting</li><li>- ESG news monitoring</li></ul>
III. Leverage fund and index products	<ul style="list-style-type: none"><li>- Fund research</li><li>- Index products</li></ul>

# Integrate ESG risks & opportunities into fundamental analysis

## Integration process & idea generation

Bloomberg Intelligence (BI) and Bloomberg New Energy Finance (BNEF) put data, analytics and insights at your fingertips to drive idea generation, identify material ESG issues by industry and inform investment strategy decisions.

BI provides in-depth analysis and data sets on industries and companies across various sectors, as well as the government, credit, litigation and economic factors that can impact decision-making.

BNEF provides research and long-term forecasts, global in-depth analysis and independent proprietary views on the entire spectrum of energy technologies and sectors — power and utilities, gas, carbon markets & climate negotiations, transport, renewable energy, energy smart technologies and storage.

91) Actions 93) Settings

<Search BI>

Environmental, Social & Governance Dashboard (BI BESGG)

Research

- Dashbd Home
- Environmental
- Social
- Governance
- Primers

Data Library

- Macro
- Industry
- Company
- ESG Scores
- Theme Scores
- Voting (Japan)
- Activists
- New Energy

Monitor

- News/Resea...
- Comp Sheets
- Markets

Midyear Outlook (Click to see more) »

BI Government Midyear Outlook: ESG

The U.S. government taking a back seat on environmental, social and governance (ESG) issues gives emphasis to reforms taking place around the world. Lack of U.S. climate leadership dents ...

Page 1 of 22

Critical Themes

- 1) Empowering Women in the Boardroom and Executive Suite
- 2) Japan's ESG Awakening
- 3) Carbon Drives Oil Stranded Assets Fear, Renewables Add
- 4) Sustainable Investing Topic Primer

Most Recent | More »

All Research

5) Controlling Ownership, Low Board Independence Endemi...	09/08
6) Food and Beverage Top Environmental Impacts Lurk in ...	09/07
7) Mars Raises the Bar for Food Industry Supply-Chain Car...	09/07
8) Consumer Discretionary Pay Policies May Offer Incentiv...	09/05
9) Audit Committees With Insiders, Conflicts May Add Overs...	09/05

## Bloomberg Intelligence BI ESG <GO>

Provides unique news and data-driven insights into sustainability themes that present material business risks and opportunities for industries and companies, including, but not limited to, climate change, human capital and diversity, corporate governance and executive compensation issues.

Bloomberg Intelligence

Environmental, Social & Governance Dashboard (BI BESGG)

Research: 50 Materials, 50 Energy & Utilities, 50 Consumer, 50 Governance, 50 Country, 50 Topics

Iron and Steel ESG Primer

05/22/17

Steel Company Key ESG Issues are Energy, Carbon and Safety

Energy use, carbon emissions, worker safety and water management are among key environmental, social and governance (ESG) issues for the iron and steel industry, according to analysis by the Sustainability Accounting Standards Board. Steel is one of the most energy-intensive industries, underscoring the importance of energy efficiency to costs. It is the largest industrial emitter of carbon. Better ...

Page 1 of 15

Gold ESG Primer

05/12/17

Safety, Community Relations, Water Lead Gold-Mining ESG Focus

In order of importance, worker safety, community relations, water management, energy use and carbon emissions are among the key environmental, social and governance (ESG) issues for the gold mining industry, according to the Sustainability Accounting Standards Board. Poor safety rates and weak community relations can increase regulatory oversight, costs and production disruptions. ...

Page 1 of 14

Chemicals ESG Primer

05/01/17

Chemicals Sustainability Navigates Regulations and Opportunities

The chemicals industry faces a balancing act of meeting evolving environmental and health regulations within the new market opportunities created for lower-impact products and other solutions. Measures to eliminate toxic materials, genetically modified food controversies and regulations governing operational emissions may harm profitability and growth. In contrast, the same regulations ...

**Bloomberg Intelligence  
BI ESG <GO>**

Industry Primers on BI ESG highlight which sustainability factors are truly value drivers. Examine how the issues have evolved over time. At the same time, incorporate unique data sets and interactive charts into your own analysis.

	Energy/ Product	Carbon/ Product	Fresh Water/ sales	Safety (LTIR)	Fatality Rate
◆ ArcelorMittal	6.63	2.14	37,893	0.16	0.09
◆ Baoshan Iron & Steel	4.91	na	na	0.03	na
▲ BlueScope Steel	5.06	1.82	4,360	0.12	0.04
▲ China Steel	6.50	2.29	5,162	0.06	0.09
▼ Evraz	8.89	2.12	45,106	0.47	0.14
◆ Hyundai Steel	4.12	0.92	na	na	na
◆ JFE Holdings	6.36	2.01	7,092	na	na
◆ JSW Steel	8.96	2.56	9,258	0.10	0.15
▼ Kobe Steel *	8.13	2.43	2,574	na	na
▼ Nippon Steel & Sumitomo Metal	6.42	2.01	14,666	na	na
◆ Novolipetsk Steel	5.46	na	9,932	0.16	0.04
▲ Outokumpu	2.72	0.77	6,701	0.42	0.06
▲ POSCO *	6.35	1.91	2,990	0.04	0.04
▼ Severstal	6.97	na	23,857	0.35	0.23
▲ Shanxi Taigang Stainless Steel	4.50	na	2,057	0.09	na
◆ SSAB	na	1.40	31,502	1.40	0.06
▼ Steel Authority of India	7.57	2.61	na	na	0.15
◆ Tenaris **	5.58	1.35	na	0.50	0.04
◆ Thyssenkrupp *	6.08	1.80	23,451	0.74	na
◆ Usinas Siderurgicas de Minas ** *	6.75	2.36	20,673	0.13	0.01

\* Calculated by dividing total energy & carbon by steel production; \*\* 2 yr fatality average  
Source: Company filings, Bloomberg Intelligence

**Steel Company Primer**

**Bloomberg New Energy Finance – BNEF <GO>**

BNEF synthesizes the most sophisticated new energy data into clear narratives that frame the financial, economic and policy implications of emerging energy technologies. BNEF research allows you to connect the dots to investment ideas and draw unique conclusions from large and complex data sets.

Actions ▾ View Options ▾ Bloomberg New Energy Finance Research

**Bloomberg New Energy Finance**

Filter by Sector	Filter by Geography	Filter by Type	Relevant Functions
<input type="checkbox"/> Wind <input type="checkbox"/> Solar <input type="checkbox"/> All other renewables <input type="checkbox"/> Utilities and Generation <input type="checkbox"/> Power Markets <input type="checkbox"/> Carbon and Climate <input type="checkbox"/> Energy Smart Technologies <input type="checkbox"/> Energy Storage <input type="checkbox"/> Natural Gas <input type="checkbox"/> Advanced Transport	<input type="checkbox"/> AMER <input type="checkbox"/> APAC <input type="checkbox"/> EMEA <input type="checkbox"/> EU <input type="checkbox"/> LATAM <input type="checkbox"/> US <input type="checkbox"/> China <input type="checkbox"/> UK <input type="checkbox"/> Germany <input type="checkbox"/> India	<input type="checkbox"/> Market Outlook <input type="checkbox"/> Research Note <input type="checkbox"/> Model & Dataset <input type="checkbox"/> Analyst Reaction <input type="checkbox"/> Weekly Report <input type="checkbox"/> Commentary <input type="checkbox"/> Short Content	<a href="#">Contact Us</a> <a href="#">BNEF Website   NEFW»</a> <a href="#">Tutorial Video</a> <a href="#">Green Bonds Guide</a> <a href="#">Tickerized BNEF Data</a>

<Narrow Search>    Focus **All** ▾    Analyst **All** ▾    Date **All** ▾    Doc Len **All** ▾

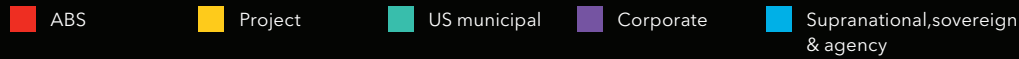
	Headline	Pg	Date
1) <input type="checkbox"/>	EU Power Weekly: Carbon Set to Swing as Tech Costs Cut	5 <input type="checkbox"/>	07:32
2) <input type="checkbox"/>	3Q 2017 Energy Smart Technologies Market Outlook	25 <input type="checkbox"/>	06:33
3) <input type="checkbox"/>	China Ex-Im, Northland in August's Eye-Catching Wind Deals: BNEF	<input type="checkbox"/>	06:29
4) <input type="checkbox"/>	Australian Power Purchase Agreement Dataset Sep. 2017	2 <input type="checkbox"/>	05:26
5) <input type="checkbox"/>	Norway Vote, Cobalt, China, U.K. Auction: BNEF Week in Review	<input type="checkbox"/>	02:00
6) <input type="checkbox"/>	Lenders Wary of Panel Makers Suniva and SolarWorld: BNEF	<input type="checkbox"/>	09/08/17
7) <input type="checkbox"/>	U.S. Weather Report: Gas Demand to Dip Further in Florida: BNEF	<input type="checkbox"/>	09/08/17
8) <input type="checkbox"/>	PV Module Bankability 2017: New Tech, New Headaches?	10 <input type="checkbox"/>	09/08/17
9) <input type="checkbox"/>	Offshore Wind Auction Prices Set to Undercut U.K. Nuclear: BNEF	<input type="checkbox"/>	09/08/17
10) <input type="checkbox"/>	Oil Majors Diversify Reserves With Prices Lower for Longer: BNEF	<input type="checkbox"/>	09/08/17



## Green bonds

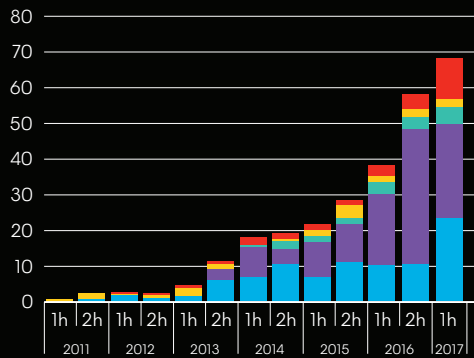
BNEF's finance experts offer in-depth research on the rapidly growing and evolving green bond market. From issuance trends to use of proceeds analyses, BNEF green bonds data is driven by Bloomberg's comprehensive and ever-growing green bond database and Bloomberg's market-leading fixed income analytics. Beyond green bonds, analyze and identify the widest range of fixed income instruments associated with sustainability opportunities.

## Is there any stopping the green bond market?



### Half-year green bond insurance

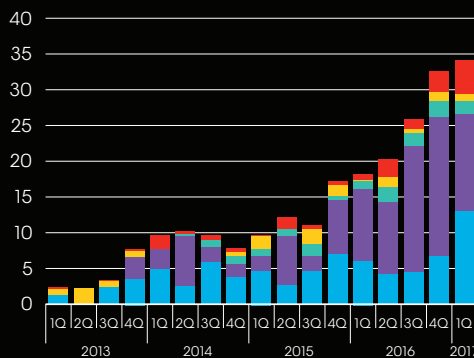
% billions



	2013		2014		2015		2016		2017
Type	H1	H2	H1	H2	H1	H2	H1	H2	H1
SSA	1.7	6.1	7.0	10.3	7.3	11.7	10.3	10.5	23.2
Corp	0.0	2.9	9.0	4.8	9.3	10.0	20.4	37.3	26.3
US muni	0.2	0.2	0.2	2.2	1.8	2.0	3.1	3.6	5.1
Project	2.3	1.6	0.0	0.6	1.7	3.4	1.2	2.0	1.7
ABS	0.0	0.2	2.0	0.9	1.6	0.936	3.2	4.3	12.0
<b>Total</b>	<b>4.1</b>	<b>11.0</b>	<b>18.2</b>	<b>18.7</b>	<b>21.7</b>	<b>28.0</b>	<b>38.1</b>	<b>57.6</b>	<b>68.2</b>

### Quarterly green bond insurance

% billions



	2014				2015				2016				2017	
Type	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SSA	5.0	2.6	5.9	3.8	4.5	2.7	4.8	6.9	6.1	4.2	4.5	6.6	13.0	11.1
Corp	2.6	7.0	2.2	1.8	2.3	7.1	2.1	7.8	10.2	10.2	17.7	19.6	13.7	13.8
US muni	0.0	0.2	1.0	1.2	1.0	0.8	1.6	0.4	0.9	2.3	1.5	2.1	1.5	3.6
Project	0.0	0.0	0.0	0.5	1.7	0.0	1.8	1.6	0.1	1.1	0.6	1.4	0.9	0.7
ABS	1.9	0.2	0.7	0.3	0.0	1.5	0.6	0.4	0.9	2.5	1.3	2.8	4.9	7.1
<b>Total</b>	<b>9.6</b>	<b>10.1</b>	<b>9.7</b>	<b>7.67</b>	<b>9.6</b>	<b>12.1</b>	<b>10.9</b>	<b>17.0</b>	<b>18.1</b>	<b>20.2</b>	<b>25.6</b>	<b>32.4</b>	<b>34.0</b>	<b>36.3</b>

Source: Bloomberg New Energy Finance. Note: \*H1 2017 is H1 2017 to date, the number is not extrapolated

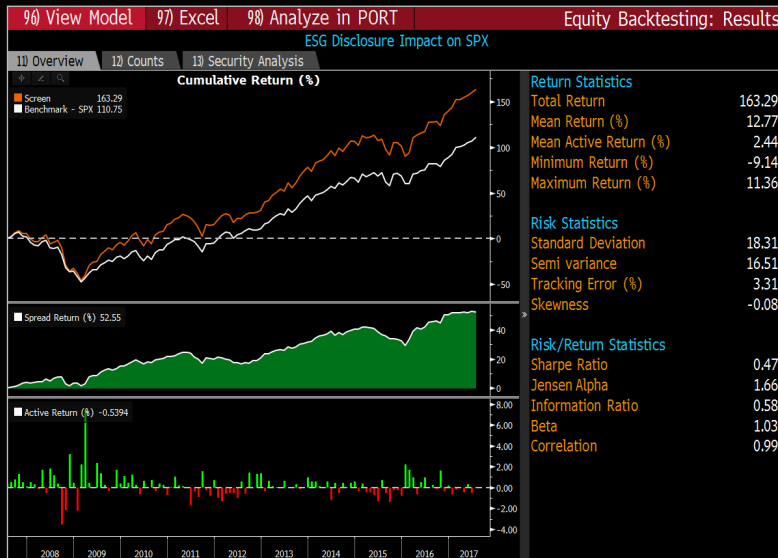
## Security screening & selection

Bloomberg-integrated analytics tools include equity and fixed income screening for quick insights into companies that meet specified ESG criteria.

97) Formula	98) Actions	99) Backtest	Equity Screening	
My Recent Screens			As Of 09/11/2017	
11) For Jan	Screening Criteria			
12) TCFD Energy	31) Exchanges	32) Sectors	33) Country of Domicile	
13) TCFD M&B Metals Mi...	34) Indices	35) Portfolios/Monitors	45) More Categories	
14) TCFD Transportation	Add Criteria			
15) TCFD All Others	Fields			
16) TCFD Pkg Foods and...	Selected Screening Criteria			
17) TCFD M&B Capital G...	Matches			
18) Japan Governance	Security Universe			
19) TCFD	915686			
20) All Saved Screens	258415			
Popular Screens			505	
21) Global Infrastructure	51) Trading Status: Active	251		
22) High CDS Spreads	52) Indices: S&P 500 Index	235		
23) Insider Buyers	53) Top 50 Sequential Percentile Rank - Higher is Better(Latest FY ESG Di...	235		
24) Quality Screen	54) Latest FY Total Greenhouse Gas / Carbon Dioxide Emissions has data	235		
25) SZSE SEHK Northbound	Display Only Fields			
26) Value Screen	55) Total GHG CO2 Emissions Intensity per Energy	235		
30) More Screens	56) Add screening criteria			

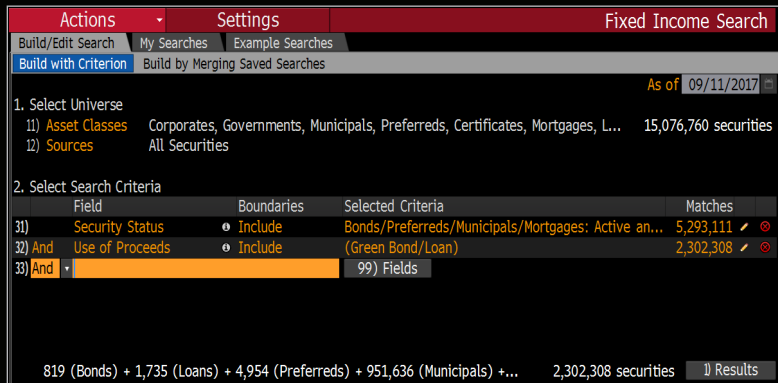
### Equity screening EQS <GO>

Generate unique investment ideas combining Bloomberg ESG and financial data with security screening. EQS <GO> features both ready-made ESG searches and user-customizable fundamental and ESG data. Any screened universe can be built on EQS and easily integrated throughout Bloomberg analytics, including in ESG news controversy alerts and portfolio and risk analysis tools.



**Equity backtesting**  
**EQBT <GO>**

Enables backtesting of investment ideas to see how ESG screens would have impacted historical performance.



**Fixed income search**  
**SRCH <GO>**

Enables bond screening for green, social and sustainability labeled bonds and issuers. Any saved universe can be easily integrated into portfolio and risk analysis tools.

## Company performance analysis & scoring

Gain insights on risks and opportunities for over 9,000 companies across 70 countries based on company-reported ESG data. Bloomberg also offers third-party partner data and scores. Generate proprietary issuer ESG scores with full transparency using Bloomberg analytics and ESG data.

BP/ LN Equity		Export to Excel		Environmental, Social & Governance Analysis			
BP PLC				History 5 Years		Currency GBP	
Summary		vs History	vs Peers	97) ESG Scores   RV ESG »			
Environmental	Better	Better		RobecoSAM Rank	61	ISS QualityScore	1
Social	Better	Better		Sustainalytics Rank	75.6	CDP Climate Score	6
Governance	Better	Worse		Bloomberg ESG Disclosure	68		
98) Analyze Peers		vs History		vs Peers			
Metrics	Current	History	Change	Low	Range	High	Median Difference History
1) Environmental							
11) GHG/Revenue	415.3		127.7 W	365.8		897.3	651.5 -236.2 B
12) GHG/MBOE	46.9		-9 B	21.7		194.2	81.8 -34.9 B
13) Carbon Reserves	7280.3		313.8 W	119.7		5280	1424.6 5855.7 W
14) Oil in Total Prod %	59.7		24.9 W	35.2		92.2	50.5 9.2 W
15) Energy/MBOE	175.6		-42 B	100.8		727	281.6 -106 B
2) Social							
21) Women Empls Mgmt Ratio	0.67		0.07 B	0.18		0.92	0.61 0.05 B
22) Women Employees %	33		3 B	23		41	30.5 2.5 B
23) Employee Turnover %	16		3 W	4		13	10.8 5.2 W
24) Employees Unionized %	--		--	68.9		89	78.3 --
25) Lost Time Incident Rate	0.05		-0.03 B	0.05		0.33	0.12 -0.07 B
3) Governance							
31) Independent Directors %	78.6		5.2 B	26.3		90	61.1 17.5 B
32) Percent of Board Members...	23.1		23.1 B	10.5		50	20 3.1 B
33) Director Avg Age	62		3 W	58		62	60 3 W
34) Director Meeting Attd %	98		3.6 B	88.4		99.4	94.5 3.5 B
35) Board Size	13		-2 B	8		19	12 2 W

### Environmental, Social & Governance Analysis ESG <GO>

Provides a quick snapshot of a company's historical ESG performance using the most material and best-reported metrics, third-party ESG scores. Analyze improving or lagging ESG performance vs. peers and history.

Bloomberg ESG Performance Scorecard										
*Note: Enter PRVTU ID or Index Ticker										
Portfolio	NDX	Sector	BICS							
Benchmark	SPX	Fiscal Year	2016	Calculate	Settings	Show Chart	Show Columns	CDE Page		
Display	Ticker									
Ticker	Universe	BICS Level 1	BICS Level 3	Type	ESG		Environmental		Social	
					Rank	% Rank	Weight	Rank	Weight	Rank
IPG UN	Communications		Advertising & Marketing	Benchmark	55.33	100.0%	33.3%	50.00	33.3%	33.33
OMC UN	Communications		Advertising & Marketing	Benchmark	24.59	0.0%	33.3%	n/a	33.3%	n/a
CHTR UW	Communications		Cable & Satellite	Both	27.37	50.0%	33.3%	n/a	33.3%	n/a
CMCSA UW	Communications		Cable & Satellite	Both	53.10	66.6%	33.3%	n/a	33.3%	84.72
DISH UW	Communications		Cable & Satellite	Both	22.57	33.3%	33.3%	n/a	33.3%	n/a
LBTYA UW	Communications		Cable & Satellite	Portfolio	57.69	83.3%	33.3%	25.00	33.3%	81.55
LBTYK UW	Communications		Cable & Satellite	Portfolio	57.69	83.3%	33.3%	25.00	33.3%	81.55
LILA UW	Communications		Cable & Satellite	Portfolio	4.59	0.0%	33.3%	n/a	33.3%	n/a
LILAK UW	Communications		Cable & Satellite	Portfolio	4.59	0.0%	33.3%	n/a	33.3%	n/a
CBS UN	Communications		Entertainment Content	Benchmark	28.76	87.5%	33.3%	n/a	33.3%	26.79
DIS UN	Communications		Entertainment Content	Benchmark	74.05	100.0%	33.3%	75.00	33.3%	66.67
DISCA UW	Communications		Entertainment Content	Both	24.18	25.0%	33.3%	n/a	33.3%	n/a
DISCK UW	Communications		Entertainment Content	Both	24.18	25.0%	33.3%	n/a	33.3%	n/a
FOX UW	Communications		Entertainment Content	Both	25.48	50.0%	33.3%	n/a	33.3%	n/a
FOXA UW	Communications		Entertainment Content	Both	25.48	50.0%	33.3%	n/a	33.3%	n/a
SNI UW	Communications		Entertainment Content	Benchmark	22.62	0.0%	33.3%	n/a	33.3%	n/a
TWX UN	Communications		Entertainment Content	Benchmark	27.31	75.0%	33.3%	n/a	33.3%	n/a
VIAB UN	Communications		Entertainment Content	Both	23.77	12.5%	33.3%	n/a	33.3%	n/a
CTRP UW	Communications		Internet Based Services	Portfolio	22.58	20.0%	33.3%	n/a	33.3%	19.44
EXPE UW	Communications		Internet Based Services	Both	42.21	100.0%	33.3%	n/a	33.3%	63.89
LVNTA UW	Communications		Internet Based Services	Portfolio	7.32	0.0%	33.3%	n/a	33.3%	n/a
PCLN UW	Communications		Internet Based Services	Both	37.57	80.0%	33.3%	n/a	33.3%	27.78
TRIP UW	Communications		Internet Based Services	Benchmark	24.99	40.0%	33.3%	n/a	33.3%	11.11
VRSN UW	Communications		Internet Based Services	Benchmark	35.01	60.0%	33.3%	n/a	33.3%	27.78

**Excel template library for ESG performance scores XLTP XSCR <GO>**

Generates transparent ESG performance scores to assess company and portfolio ESG performance with options for user-customized, sector specific weightings and ESG momentum factors.

BP / LN Equity	Alerts	Contact IR	Company Management		
Board	83 Committees	84 Changes	85 Cross Boarding	80 Summary	
BP PLC			Peer Companies		
Board	Value	Peer Avg	Executives	Value	Peer Avg
Structure			Structure		
# Directors	13	13	# Executives	9	10
% Non-Exec Directors	85	87			
Diversity			Diversity		
% Women Directors	23	25	% Women Executives	0	12
Average Age	--	60	Average Age	--	--
Age Range	--	23	CEO Age	61	59
Entrenchment			Entrenchment		
Average Tenure (Years)	5.11	5.36	Average Tenure (Years)	10.24	7.24
# Directors > 5yr Tenure	8	5	CEO Tenure (Years)	7.00	3.87
# Directors > 10yr Tenure	0	2			
Overboarding			Ownership		
Average # Boards Served	1.08	0.86	% Execs Holding Shares	44	41
Highest # Boards Served	3	3	% CEO Ownership	0.0096	0.0044
% Exec Dirs on 2+ Boards	0	0			
% Non-Exec Dirs on 3+ Boards	9	11			

**Company management MGMT <GO>**

Bring transparency to company governance with real-time updates on Board and management information. Evaluate Board independence, diversity and suitability and identify potential conflicts of interest. Track performance by specific management teams and follow those managers through their transitions to other companies.



# Analyze, monitor & report on portfolios

## ESG exposure & performance analysis

Portfolio & Risk Analytics																					
Main View Summary Cash Flows Liquidity Risk Key Rates																					
ESG SCORECARD DEM vs S&P 500 INDE by BICS Sectors in USD As of 08/29/17																					
Date Trend																					
Name	Wgt	UD-Custom ESG Score			UD-Custom Gov Score			UD-Custom Env Score			UD-Custom Social Score										
	Port	Bmkr	+/-	Port	Bmkr	+/-	Port	Bmkr	+/-	Port	Bmkr	+/-	Port	Bmkr	+/-						
ESG SCORECARD DEMO	100.00	100.00	0.00	58.81	55.00	3.80	79.68	76.96	2.72	64.84	66.76	-1.92	63.29	55.60	7.70						
Utilities			3.31	-3.31			54.64	-54.64				75.57	-75.57			49.08	-49.08			60.50	-60.50
Technology	24.59	14.93	9.66	80.01	72.02	7.99	82.41	82.52	-0.10	80.97	87.99	-7.02	77.86	67.36	10.50						
QCOM US	7.40	0.37	7.13	84.76	84.76	0.00	75.22	75.22	0.00	95.00	95.00	0.00	84.07	84.07	0.00						
NU US	3.85	0.16	3.69	60.65	60.65	0.00	82.97	82.97	0.00	50.00	50.00	0.00	48.97	48.97	0.00						
LXCX US	0.19	0.13	0.06	28.09	28.09	0.00	84.28	84.28	0.00												
INTC US	3.86	0.78	3.08	91.02	91.02	0.00	89.54	89.54	0.00	95.00	95.00	0.00	88.52	88.52	0.00						
IBH US	4.80	0.58	4.22	85.80	85.80	0.00	83.79	83.79	0.00	95.83	95.83	0.00	77.78	77.78	0.00						
AHAT US	0.21	0.23	-0.02	53.10	53.10	0.00	84.30	84.30	0.00	50.00	50.00	0.00	25.00	25.00	0.00						
ADSK US	3.61	0.10	3.51	74.61	74.61	0.00	86.04	86.04	0.00	50.00	50.00	0.00	87.78	87.78	0.00						
AAPL US	0.58	4.06	-3.47	86.01	86.01	0.00	88.99	88.99	0.00	92.86	92.86	0.00	76.19	76.19	0.00						
Industrial	9.16	10.10	-0.94	64.77	52.40	12.37	79.28	76.58	2.70	55.58	49.02	6.56	75.02	52.93	22.09						
UPS US	5.24	0.38	4.87	78.17	78.17	0.00	78.66	78.66	0.00	62.50	62.50	0.00	93.33	93.33	0.00						

### Portfolio & Risk Analytics PORT <GO>

Analyze the ESG performance of your portfolio against a benchmark on key metrics with Bloomberg's Portfolio & Risk Analytics solution. Analyzes current and historical performance of portfolios on an absolute basis or relative to a benchmark.

## Portfolio-level ESG reporting

Bloomberg		Portfolio Carbon Footprint Tool																	
Language	English																		
Portfolio	UKX Index																		
Benchmark	SXSP Index																		
Classification (for estimate)	BICS																		
Level (for estimate)	Level 1																		
Normalised By	Sales																		
Debt Denominator	Net Debt																		
Fiscal Year	2015																		
Group By	BICS Level 1																		
Currency	GBP																		
Update		<table border="1"> <thead> <tr> <th>Location</th> <th>EffElection</th> <th>EffElection</th> <th>EffElection</th> </tr> </thead> <tbody> <tr> <td></td> <td>43.14</td> <td>-69.32</td> <td>-26.13</td> </tr> </tbody> </table>										Location	EffElection	EffElection	EffElection		43.14	-69.32	-26.13
Location	EffElection	EffElection	EffElection																
	43.14	-69.32	-26.13																
Edit Universe																			
Go to Chart																			
<input checked="" type="checkbox"/> Include Estimate		An asterisk is added in front of the company name in column B if a company is using estimate carbon data.																	
Name	Ticker	Allocation Effect	Selection Effect	Total Attribution	Weight	Weighted Carbon Intensity (tonnes/1 million GBP)	Difference	Weight	Weighted Carbon Intensity (tonnes/1 million GBP)	Difference									
FTSE 100 INDEX grouped by BICS Level 1																			
Communications	Load in Chart	- 2.51	0.52	- 1.99	7.01	5.81	1.20	50.13	42.66	7.46									
Consumer Discretionary	Load in Chart	3.33	17.27	20.60	8.08	10.93	-2.85	348.72	134.89	213.84									
Consumer Staples	Load in Chart	- 6.70	- 5.63	- 12.33	17.39	13.22	4.17	58.33	90.70	- 32.37									
Energy	Load in Chart	18.82	- 6.54	12.28	14.49	6.03	8.46	428.81	473.94	- 45.13									
Financials	Load in Chart	0.07	0.93	1.00	22.81	22.84	-0.03	16.66	12.60	4.06									
Health Care	Load in Chart	4.85	- 1.38	3.47	10.96	13.46	-2.50	45.31	57.89	- 12.59									

### Excel template library for Carbon Footprint Tool XLTP XPCF <GO>

Measure and compare a portfolio's carbon footprint against a benchmark, even when companies don't disclose emissions data. The model brings together overall portfolio exposures with attribution analysis to give a full understanding of carbon risk and opportunities to reduce it.

## ESG news monitoring

Bloomberg provides comprehensive, timely, trusted and actionable news to drive investment decisions with confidence. Quickly and easily tailor news curation to navigate critical ESG-related issues, such as emerging controversies.

The screenshot shows a Bloomberg News search interface. The search bar contains the text "SPX/ENVIR., SOCIAL, GO..." and is set to "Sort Top Ranked". Below the search bar, there are filters for "Match All of" and "SPX", "X", "Envir., Soci...X", and "Utilities". A list of 12 search results is displayed, each with a rank number, a title, and a source/timestamp. The results include news about Siemens Gamesa, Hurricane Irma, American Water Works Co, and Xcel Energy.

Rank	Title	Source/Time
1)	Siemens Gamesa to Repower Two Wind Farms in Texas for Nextera	BN 09/06
2)	The Latest: Irma Knocks Out Power to 7M Homes, Businesses	APW 12:50
3)	American Water Works Co Presentation Barclays Global CEO Energy	BT 09/06
4)	MarketWatch: IMPORTANT SHAREHOLDER ALERT: Lundin Law PC Announces an Inves...	NS1 12:57
5)	Corporate PPA Monthly: Spotlight on the United States	BNE 08/29
6)	Ameren responds to request for assistance in anticipation of Hurricane Irma's lan...	PRN 09/08
7)	Trans&Dist World: Xcel Energy Foundation Donates to Red Cross to Assist with Hurr...	IN1 09/08
8)	Duke Asks to Cancel Planned South Carolina Nuclear Reactors	BN 08/25
9)	Xcel Energy Foundation Donates to the American Red Cross to Assist with Hurrican...	BUS 09/07
10)	CharlotteObservr: The Latest: Irma knocks out power to 7M homes, businesses	NS1 12:55
11)	Renewable Returns: U.S. Utilities Buy into Wind, Solar	BNE 08/17
12)	Jennifer A. Dlouhy: @louie4me @TheStalwart @FLGovScott NextEra said it would sh...	TWT 09/08

### Top news TOP ESG <GO>

Identifies trending and most-read stories across the spectrum of ESG issues.

Sample ESG Risks News Codes	Sample ESG Opportunity News Codes
ACCFRAUD — Accounting Fraud	BONGREEN — Green Bonds
RECALL — Product Recalls	ESGALTRNG — Renewables Innovation & Investment
HARASS — Workplace Discrimination & Harassment	GREENBUILD — Green Building
ESGTOXIC — Pollution & Spills	GREENPROD — Green Products

### News searches & alerts NLRT <GO>

Use news analysis tools to determine the stories with the greatest impact and set custom alerts to stay ahead of price moves. Set custom alerts using NLRT <GO> on some of the sample news codes below.

# Leverage fund research & index products

## Fund research

Bloomberg provides instant access to detailed data and information on over 350,000 funds worldwide to select funds that meet ESG and thematic investing criteria, seamlessly integrated with analytics. With fund screening tools, identify products that align with client requirements and mandates.

90 Actions ▾		Fund Screening	
Universe Criteria			
51) Classifications	53) Fund Type	55) Country of Domicile	57) Country of Availability
52) Portfolio/Monitor	54) Currency	56) Manager Location	58) Fund Description
Universe Criteria			
59) Holdings Classifications	60) Allocations	61) Exposure	
Screening Criteria			
<input type="text" value="Type screening criteria and select from the suggested fields"/>			<input type="button" value="Fields"/>
% Currency conversion not selected Selected Screening Criteria Matches			
Universe Criteria			776254
11) Market Status: Active			345619
12) Fund Primary Share Class = Yes			130994
13) Clean Energy Attribute: Adaptation,Biofuels,Biomass and Waste,Carbon Capture and Storage,Carbon Markets,Clean C			182

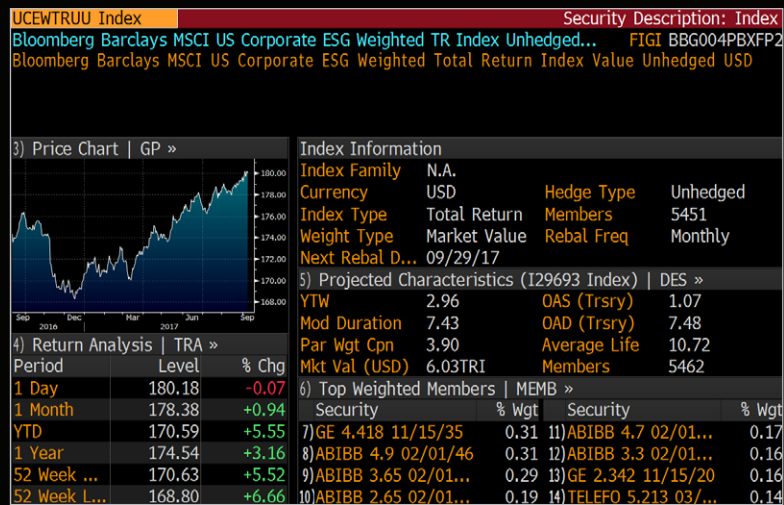
## Fund screening FSRC <GO>

Research and screen funds based on specific, customizable search criteria such as fund type, country of domicile, clean energy attributes (e.g., adaptation, carbon markets) and general attributes (e.g., climate change).

## Index products

The Bloomberg Index family expanded its fixed income index offering with the addition of Bloomberg Barclays Indices in 2016.

Bloomberg Barclays and MSCI collaborated to create the first ESG fixed income indices in the market that incorporate measures of ESG risk and involvement. Three primary methodologies: Socially Responsible, Sustainability and ESG Weighted. Bloomberg Barclays MSCI ESG Fixed Income Indices are available for Global, USD, EUR, and GBP fixed-rate, investment-grade bond universes.



### Security description DES <GO>

Review index membership on the Terminal and benchmark your bond portfolio against the Bloomberg Barclays MSCI Fixed Income Indices.



### Security description DES <GO>

Create index products based on the Bloomberg Barclays MSCI Fixed Income Indices by customizing over 100 ESG fields.

# About the Bloomberg Terminal.

Since 1981, business and financial professionals have depended on the Bloomberg Terminal® for the real-time data, news and analytics they need to make the decisions that matter. The Terminal provides information on every asset class — from fixed income to equities, foreign exchange to commodities, derivatives to mortgages — all seamlessly integrated with on-demand multimedia content, extensive electronic-trading capabilities and a superior communications network.



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## Take the next step.

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**Beijing**  
+86 10 6649 7500

**Dubai**  
+971 4 364 1000

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+49 69 9204 1210

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+852 2977 6000

**London**  
+44 20 7330 7500

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+91 22 6120 3600

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+1 212 318 2000

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+1 415 912 2960

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+55 11 2395 9000

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+65 6212 1000

**Sydney**  
+61 2 9777 8600

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+81 3 3201 8900

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