

Reminder: S&P Global Business Involvement Screens and S&P Global ESG Scores Transition

AMSTERDAM, APRIL 10, 2024: As previously [announced](#) on January 23, 2024, S&P Dow Jones Indices ("S&P DJI") is implementing the following changes impacting the S&P DJI indices using S&P DJI ESG Scores and Sustainalytics' Business Involvement Screens.

S&P DJI is transitioning all indices that are currently using S&P DJI ESG Scores to [S&P Global ESG Scores](#). In addition, S&P DJI will also transition the Business Involvement Screens data source from Sustainalytics' Product Involvement Screens to S&P Global's [Business Involvement Screens](#). More details on the changes and the impacted indices are below.

For the S&P Global ESG Score transition, there will be no change to how the score is used across the impacted indices. The S&P Global ESG Score measures a company's performance on and management of material ESG risks, opportunities, and impacts informed by a combination of company disclosures, media and stakeholder analysis, modelling approaches, and in-depth company engagement via the S&P Global Corporate Sustainability Assessment (CSA). For more information on the S&P Global ESG Score, please refer to the [S&P Global ESG Scores Methodology](#).

For the Business Involvement Screens transition, existing screens will be replaced by the direct equivalent in the new data set and no modifications will be made to the existing levels of involvement. Please refer to the [Sustainalytics to S&P Global Mapping File](#) for more details. Sustainalytics data will still be used for the Global Standards Screening where relevant.

IMPACT ANALYSIS

Please find an impact analysis for a select, representative subset of indices impacted by these changes in the [Analysis - Hypothetical Methodology Change](#) section of S&P DJI's Client Resource Center. Details of the specific indices analyzed are listed in the [Impacted Indices Spreadsheet](#). The analysis includes a wide range of metrics demonstrating the impact of the proposed changes, both individually and combined for the subset of indices. Additional details of the index-level impact of the Business Involvement Screens transition for a subset of indices is also available in the analysis.

IMPLEMENTATION TIMING

S&P DJI is implementing the previously described changes on a rolling basis commencing as of the open on **Wednesday, May 1, 2024**. Impacted indices rebalancing effective as of that date will transition then, with the remaining indices transitioning effective as of the next annual reconstitution. Please refer to the "Impacted Indices" tab of the [Impacted Indices Spreadsheet](#) for more details, along with the effective date of the change.

Please note that the impacted methodologies on S&P DJI's website are being updated to reflect these changes.

For more information about S&P Dow Jones Indices, please visit www.spglobal.com/spdji.

ABOUT S&P DOW JONES INDICES

S&P Dow Jones Indices is the largest global resource for essential index-based concepts, data and research, and home to iconic financial market indicators, such as the S&P 500[®] and the Dow Jones Industrial Average[®]. More assets are invested in products based on our indices than products based on indices from any other provider in the world. Since Charles Dow invented the first index in 1884, S&P DJI has been innovating and developing indices across the spectrum of asset classes helping to define the way investors measure and trade the markets.

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