

# Morningstar Climate and Net-Zero Aligned Solutions

A Morningstar delivers market-leading data, research, products, and services that are designed to empower investors to make investment decisions for their circumstances, goals, and preferences.

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## Enabling Sustainable Investing Choices:

- ▶ We aim to make sustainable-investing accessible, transparent, and relevant to investors. Our sustainable-investing data, services, and research seek to provide investors of all types with tools to understand sustainability risks and opportunities in their investments and to support issuers looking to improve the sustainability of their firms.
- ▶ We integrate sustainability principles into our corporate strategy to advance data transparency, accessibility, and choice for investors. When investors have more access to comparable data, more transparency into company behavior, and more information about the way in which their investments are affected by—and affect—the broad environment in which they operate, decision-making in capital markets functions better.

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## Enabling a Climate Transition:

- ▶ Limiting global emissions requires a whole economy in transition and systemic change requires ambitious commitments across the financial system. Morningstar recognizes that the most significant impact we can have on the sustainability of markets is through our climate and environmental data, tools, services, and research, which support and inform the decisions of global investors of all types.
- ▶ Comprehensive and high-quality climate-related research and data, indices and benchmarks, are needed across the investing ecosystem to better inform climate-related and net-zero aligned investment decision making. Morningstar is committed to delivering products and services that allow investors to align their investments with their values, priorities, and climate goals and obligations.

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## Our Relevant Data, Products, and Services:

- ▶ We provide products and services that enable investors to support climate-related goals and a net-zero transition. These include data sets with a methodology primarily focused on assessing an entity's greenhouse gas (GHG) emissions—either across its value chain or in how it manages those emissions—and products that are built from those fundamental data sets.

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<sup>1</sup> We defer to the IPCC (Intergovernmental Panel on Climate Change) definition of net zero emissions: Net zero emissions are achieved when anthropogenic emissions of greenhouse gases to the atmosphere are balanced by anthropogenic removals over a specified period. Where multiple greenhouse gases are involved, the quantification of net zero emissions depends on the climate metric chosen to compare emissions of different gases (such as global warming potential, global temperature change potential, and others, as well as the chosen time horizon).

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## Our Products

- ▶ **Our Net-Zero Aligned Research & Data Solutions** are designed to help investors measure carbon emissions across their total portfolio, enhance their view of transition and physical climate risk, meet reporting and disclosure requirements, fulfill climate goals, benchmark potential resilience to climate transition and risk, and capture low-carbon investment opportunities.
- ▶ **Our Net-Zero Aligned Indices and Benchmarks** deliver equity index capabilities across regional and global exposures. These leverage forward and backward-looking metrics on corporate emissions, targets, policy and program indicators, and business activities. We provide indexes to support a range of different investor objectives including those who seek to reduce their exposure to carbon risk and pursue opportunities arising from the transition to a low-carbon economy, such as the Morningstar Paris Aligned Benchmark series.
- ▶ **Our other tools** deliver comprehensive access to Morningstar data and research capabilities. Investors of all types can access net-zero aligned data, research, and assessments through data feeds, data platforms and applications, and custom data delivery services. Learn more about our [Data and Analytics](#).

## About Morningstar Sustainalytics

Morningstar Sustainalytics is a leading ESG research, ratings, and data firm that supports investors around the world with the development and implementation of responsible investment strategies. For 30 years, the firm has been at the forefront of developing high-quality, innovative solutions to meet the evolving needs of global investors. Today, Morningstar Sustainalytics works with hundreds of the world's leading asset managers and pension funds who incorporate ESG and corporate governance information and assessments into their investment processes. The firm also works with hundreds of companies and their financial intermediaries to help them consider ESG Risk in policies, practices, and capital projects. For more information, visit [www.sustainalytics.com](http://www.sustainalytics.com).

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