

# Bloomberg Equity Indices

Explore the possibilities with Bloomberg Indices

Bloomberg offers a full suite of equity benchmarks and custom index capabilities for benchmarking, asset allocation and product creation. Combining these comprehensive index solutions with our sophisticated data and research capabilities has allowed Bloomberg to expand the potential for innovative financial product construction.

## Global coverage

Covering over 99% of the available free float market cap in 49 developed & emerging countries



Bloomberg Equity Indices are available in global, regional and country exposures, in various currencies and returns (price/total/net), including World Aggregate (ticker: WAGGE), Developed Markets ex-North America (ticker: DXAP), and Developed Markets (ticker: DM).

## Beyond benchmarks



### ESG

Not only does Bloomberg offer an ecosystem of sustainable finance solutions, we also partner with external ESG ratings, framework and data providers to create index alternatives.



### Risk premium

Investors and product issuers can utilize Bloomberg's leading risk models in order to measure, isolate and gain access to alternative sources of return.



### Thematic

Bloomberg Indices employ highly differentiated data in a variety of themes, allowing product issuers to create transparent exposures – like electric vehicles, 5G and more – based on supporting research from world-class analysts.



### Multi-asset solutions

Our equity benchmarks can easily be combined with our leading fixed income and commodity indices in order to create asset allocation products.



### Customization

We offer consultative benchmark design for targeted equity exposures (e.g., factors, style), including custom datasets.



### Data access

Index-level and constituent data is available on third-party platforms and on the Bloomberg Terminal.® Terminal users can access these at IN EQ <GO> and index publications at INP <GO>.

## Bloomberg Equity Indices

### Market cap

We offer benchmarks covering over 99% of the available free float market cap in 49 developed and emerging countries.

### ESG

As clients look to incorporate measures of sustainability into their portfolios, Bloomberg has led the way in offering ESG index resources and customization capabilities. Not only does Bloomberg offer a robust ecosystem of sustainable finance solutions, we also partner with external ESG ratings, framework and data providers to create index alternatives, such as the Bloomberg SASB US Large Cap ESG Indices, to meet the diverse needs of investors.

### Value and growth

We offer traditional value and growth oriented indices for the U.S. market.

### Factors

Factor index strategies seek to capture market risk premia in a systematic way. The Bloomberg US Large Cap Dividend Yield Index (B500D), for example, represents the performance of the top 100 highest-yielding securities screened from the B500, excluding REITs. Companies are weighted in proportion to an annual regular cash dividend.

### Optimized

Precision index design seeking to capture certain risk or performance attributes are key for many investors. Using Bloomberg's institutional grade Portfolio & Risk Analytics optimizer to design index portfolios provides targeted exposures that are systematic and replicable.

## About Bloomberg Indices

### Representative universes and strategies

We offer a broad suite of financial benchmarks across asset classes that investors can customize for their portfolio needs. Coverage includes size, factors and ESG for custom index creation and seamless integration into multi-asset class indices using Bloomberg's proprietary equity, fixed income and commodity indices.

### Transparent, rules-based design

Bloomberg Indices are produced using rules-based methodologies that provide clear guidelines for construction, eligibility, corporate action treatment, rebalances and segmentation. Bloomberg's robust proprietary data and index portfolio construction capabilities provide the ability to tailor exposures and target themes based on clearly defined rules and criteria.

### Broadly customizable

Bloomberg publishes bespoke benchmarks and actively works with index users in a consultative manner on benchmark design, methodology, back-testing, selection and documentation of their custom indices.

### Replicable construction

Bloomberg Indices are designed to be replicable for investors and product issuers, allowing for closer tracking to the benchmark and easier trading and management of portfolios against the index families.

### Performance attribution

Seamless integration and decomposition of portfolio and index performance are available on the Bloomberg Terminal.

### Robust governance

Dedicated governance committees focus on key matters such as client challenges, launch of new benchmarks, operational incidents, major announcements and material changes concerning the benchmarks.

### Distribution

Bloomberg Indices are broadly distributed and are available on the Bloomberg Terminal at no additional cost. Information on Bloomberg Indices can also be found through Bloomberg webinars and media properties, like Bloomberg Television and Bloomberg Radio.

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## Take the next step.

For additional information, press the <HELP> key twice on the Bloomberg Terminal®.

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