Custom R&D Services
You have the idea. We’ll provide the research.

What is Custom R&D?
Our Custom R&D team consults on the implementation of clients’ proprietary index methodologies and enhances the index design process for customized use. Through a collaborative approach with clients, we use the custom index methodology to reflect the client’s specified constituent selection, weighting schemes, corporate action treatment, and overall index calculations.

Why use Custom R&D?
Clients can leverage S&P DJI’s indexing expertise to assemble a custom index methodology capturing their specific strategy. We supply back-tests and analytics based on client specifications to help make decisions about index rules. Methodologies developed with us are fully integrated with S&P DJI’s policies and procedures, allowing for a seamless launch process.

Key Deliverables Based on Your Index Objectives:

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<tr>
<th>Back-Tests</th>
<th>Analytics</th>
<th>Methodology</th>
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<tr>
<td>- Historical back-tests</td>
<td>- Statistics</td>
<td>- Index construction</td>
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<tr>
<td>Snapshotting index constituents and weights at each rebalance</td>
<td>Risk/return profile, information ratio, tracking error, dividend yield, market/benchmark betas, drawdown, active share at each rebalance</td>
<td></td>
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<tr>
<td>- Historical index levels and daily returns</td>
<td>- Composition</td>
<td>- Index maintenance</td>
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<td>Based on back-testing</td>
<td>Group breakdowns such as sector, country, turnover, capacity, top/bottom X weights</td>
<td>Rebalancing, corporate actions, currencies, base date, and historical availability</td>
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<tr>
<td></td>
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<td>- Index governance¹</td>
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</table>

¹ Methodology conception and index idea generation are out of scope.
² If S&P DJI is engaged as the Benchmark Administrator for the custom index.
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.

S&P Dow Jones Indices is a division of S&P Global (NYSE: SPGI), which provides essential intelligence for individuals, companies, and governments to make decisions with confidence. For more information, visit www.spglobal.com/spdji/en/.

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