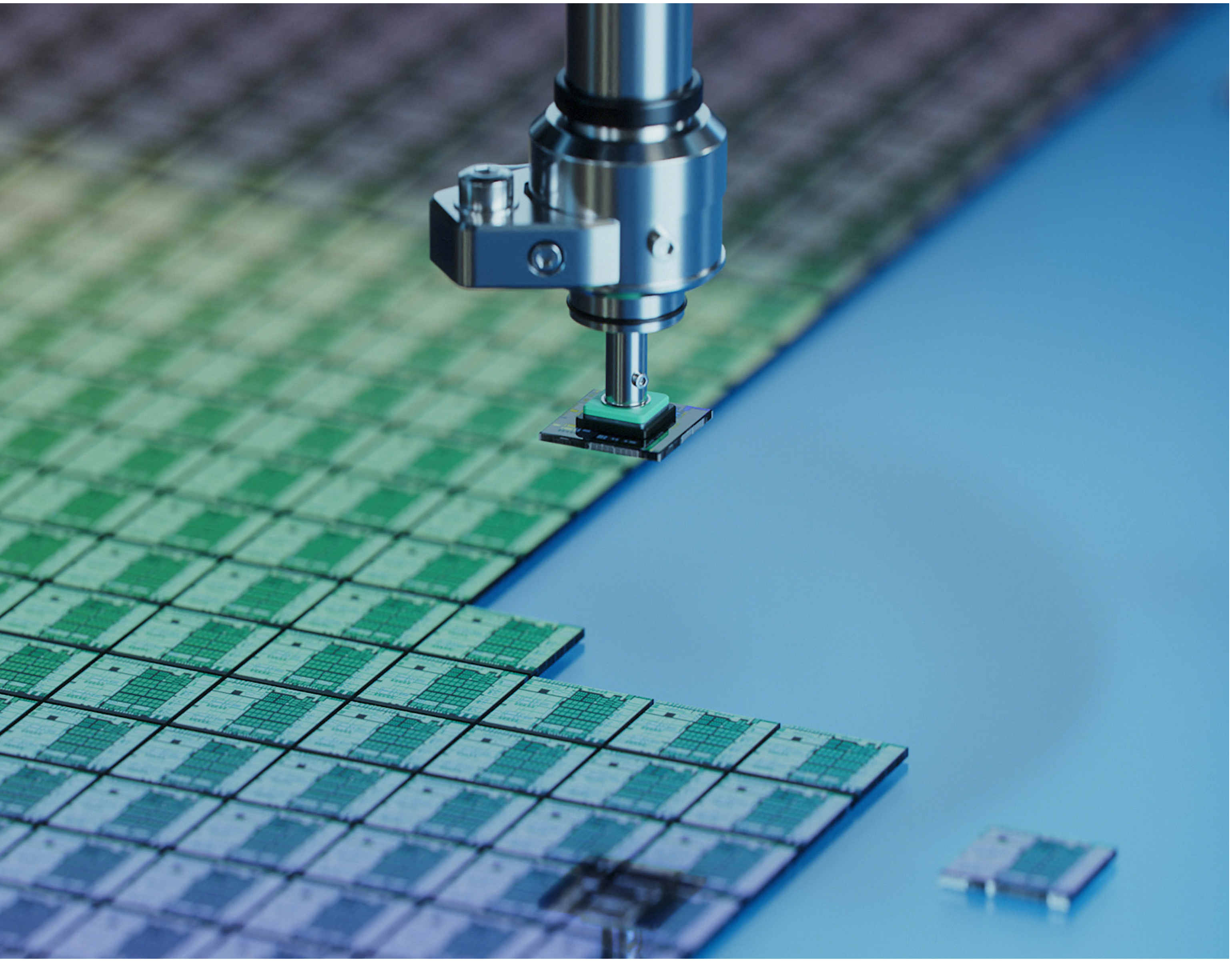
Custom Index Solutions

You have the idea. We'll create the index.



S&P Dow Jones Indices

A Division of S&P Global

Custom solutions from the world's leading index provider

Home to iconic indices, including the **S&P 500® and DJIA®**

Our indices underlie more **index-linked products** than any other index provider, with **USD 27T** indexed or benchmarked to S&P DJI indices[1]

Our indices underlie the **most liquid financial products** in the market for both equity **(USD 243T)**[2] and credit **(USD 35T)**[3]

Unmatched custom index calculation offerings

We provide custom index solutions for investors, exchanges and ETF providers across the globe.[4]

6K+	200+	40+	50+	17
Headline hybrid and white label indices	Clients worldwide	Countries	Dedicated custom team members	Global exchange relationships

Our custom indices are the driving force behind:

- Passive ETFs
- Active ETFs
- Structured notes
- OTC products
- Benchmarks
- Managed accounts

Users of custom indices can include:

- ETF providers
- Asset managers
- QIS desks
- Asset owners
- Exchanges
- Registered Investment Advisors (RIAs)

Power of a prominent brand

Dedicated marks convey that clients' custom indices are calculated and/or administered by S&P Dow Jones Indices.

Calculated by
S&P Dow Jones Indices

Calculation & Benchmark Administration by
S&P Dow Jones Indices

[1] S&P Dow Jones Indices, data as of December 31, 2024.

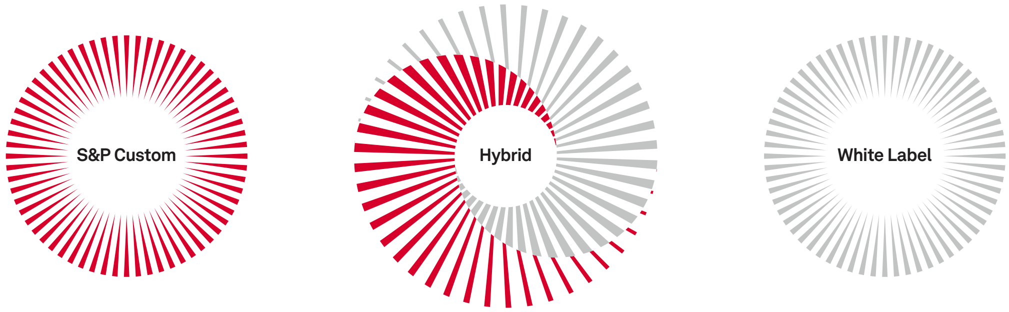
[2] Futures Industry Association (FIA), Options Clearing Corporation (OCC), S&P DJI, Bloomberg and Cboe Exchange, Inc. Note: Data from 12-month period ended December 31, 2023. A delta hedge was applied to calculate the Index Equivalent (IET) for Options Notional.

[3] The Depository Trust & Clearing Corporation (DTCC), OSTTRA Group Ltd., Cboe Exchange, Inc. and FactSet Research Systems Inc. Note: Data from 12-month period ended December 31, 2023.

[4] S&P Dow Jones Indices, data as of December 31, 2025.

Solutions that empower clients to bring their ideas to life

Clients can customize an existing S&P DJI index, create a client-branded white label index or generate a hybrid of the two.



S&P CUSTOM
S&P Branded Index
Clients customize existing S&P DJI indices to create indices that are sponsored and governed by S&P DJI.

HYBRID
Client Index Using S&P DJI Inputs
Client-branded index using client's proprietary methodology and S&P DJI index levels or constituent universes.

WHITE LABEL
Client Index
Client-branded index using client's proprietary methodology that does not reference S&P DJI intellectual property.

SPICE® IndexBuilder™ – a self-service approach to customization

Professional-grade tool allowing users to quickly and efficiently **prototype**, **backtest**, **analyze and order** custom index concepts.

Why clients choose us

Brand Association

Highly visible brand name is associated with industry best practices of proprietary indices such as the S&P 500 and the DJIA.

White Glove Service

Customized, responsive client service from dedicated team members across departments.

Business Continuity

Highly reliable index maintenance and production and 24-6 client service from regional teams.

Coverage

Rigorously maintained databases covering more than 40,000 securities in 90 countries.[5]

How indices can be customized

Asset Class	Theme	Sector	Region	Size
Equities	Yield	GICS® Sectors	Global	Large Cap
Commodities	Dividends	GICS Industry Groups	Americas	Mid Cap
Fixed Income	Emerging Markets	GICS Industries	Europe	Small Cap
	Theme of choice	GICS Sub-Industries	Middle East & Africa	
			Asia Pacific	

Weighting	Capping	Rebalancing	Currency	Return Type
Market Cap	Constituent	Daily	All country and regional currencies and cryptocurrencies	All return types are available
Equal	Regional	Weekly	Hedging by currency is also available	
Price	Sector	Quarterly		
Fundamentals	Capping scheme of choice	Annually		
Weighting scheme of choice		Ad hoc		

[5] Data as of December 31, 2025.

To learn more about our custom index solutions, contact our team.

About S&P Dow Jones Indices

At S&P Dow Jones Indices, we provide iconic and innovative index solutions backed by unparalleled expertise across the asset-class spectrum. We're the largest global resource for index-based concepts, data and research and home to iconic financial market benchmarks such as the S&P 500® and the Dow Jones Industrial Average®. More assets are invested in products based upon our indices than any other index provider in the world. Our solutions bring transparency to global capital markets and are widely considered essential in tracking market performance, evaluating portfolios and developing investment strategies.

S&P Dow Jones Indices is a division of S&P Global (NYSE: SPGI). S&P Global enables businesses, governments and individuals with trusted data, expertise and technology to make decisions with conviction. We are Advancing Essential Intelligence through world-leading benchmarks, data and insights that customers need in order to plan confidently, act decisively and thrive in a rapidly changing global landscape. Learn more at www.spglobal.com/spdji.

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