

UNGC Quarterly Eligibility Review Methodology Updates

AMSTERDAM, JANUARY 23, 2024: S&P Dow Jones Indices (“S&P DJI”) announces changes to S&P DJI indices’ United Nations Global Compact (“UNGC”) eligibility requirements.

In order to ensure a timelier removal of those companies classified as Non-Compliant with UNGC eligibility requirements, S&P DJI is revising the Quarterly Eligibility Review process in relevant indices, so UNGC eligibility is always reviewed in March, June, September, and December, in line with the schedule of the Global Standards Screening dataset regardless of the rebalancing schedule of the specific index. For those indices already employing Quarterly Product Involvement Eligibility Reviews, the timing for that review remains in line with the index rebalancing schedule and will not be modified. In addition, some indices will add a UNGC and/or Product Involvement review. Please refer to the below Impacted Indices Spreadsheet for more details on the index-specific changes.

IMPLEMENTATION TIMING

S&P DJI will implement 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 at the next annual reconstitution. For index-specific implementation dates, refer to the [Impacted Indices Spreadsheet](#).

Please note that the relevant 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.

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S&P Dow Jones Indices
index_services@spglobal.com