Custom Indices

You have the idea. We’ll create the index.
**Our custom indices** give clients the ability to design, manage and market products that match any investment strategy. You can:

- Create your own index by customizing one of our existing indices
- Create a white label index using your own intellectual property
- Create a hybrid index that implements your proprietary methodology but uses our index levels or constituents as inputs

Drawing on a wealth of experience and industry knowledge, we construct, maintain and disseminate custom indices for a wide variety of investors, exchanges and ETF providers across the globe.

### Our custom solutions:

<table>
<thead>
<tr>
<th>Variation on a standard S&amp;P Dow Jones Index</th>
<th>Client’s proprietary index using or referencing an S&amp;P Dow Jones Index</th>
<th>Client’s proprietary index</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Client adjusts an existing S&amp;P DJI index.</td>
<td>- Client methodology uses an S&amp;P DJI index as a universe, or the value of an index as an input.</td>
<td>- Client methodology does not use S&amp;P DJI intellectual property.</td>
</tr>
<tr>
<td>- S&amp;P DJI owns the intellectual property.</td>
<td>- Client owns the intellectual property.</td>
<td>- Client owns the intellectual property.</td>
</tr>
<tr>
<td>- Index retains S&amp;P DJI branding.</td>
<td>- Index carries the client’s branding.</td>
<td>- Index carries the client’s branding.</td>
</tr>
</tbody>
</table>

**The driving force behind:**

- ETFs and ETNs
- Structured Notes
- OTC Products
- Benchmarks
- iNAVs
Why clients choose us:

1. **Brand Association**
   The S&P Dow Jones Indices brand is synonymous with integrity and objectivity. The “Calculated by S&P DJI” mark, which lends legitimacy to the underlying index, is made available to all custom index clients.

2. **Extensive Coverage**
   Our database of index and constituent data covers more than 22,000 securities in 81 countries.

3. **Expertise & Experience**
   Over 150 clients globally leverage our experience creating and calculating over 330,000 indices. Our custom indices are managed with the same rigorous processes and robust infrastructure used to calculate our flagship indices.

4. **Client Service**
   A dedicated team of custom index experts is accessible locally, regionally and globally 24 hours a day, 7 days a week.

Users of custom indices:
- Exchange-traded fund providers
- Asset managers
- Derivative and structured product teams
- Pension plans
- Exchanges
- Registered Investment Advisors (RIAs)

Customize your index by:

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Theme</th>
<th>Sector</th>
<th>Region</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equities</td>
<td>Yield</td>
<td>GICS® Sectors</td>
<td>Global</td>
<td>Large Cap</td>
</tr>
<tr>
<td>Commodities</td>
<td>Dividends</td>
<td>GICS Industry Groups</td>
<td>Americas</td>
<td>Mid Cap</td>
</tr>
<tr>
<td>Fixed Income</td>
<td>Emerging Markets</td>
<td>GICS Industries</td>
<td>Europe</td>
<td>Small Cap</td>
</tr>
<tr>
<td></td>
<td>Theme of your choice</td>
<td>GICS Sub industries</td>
<td>Middle East &amp; Africa</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Asia Pacific</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weighting</th>
<th>Capping</th>
<th>Rebalancing</th>
<th>Currency</th>
<th>Return Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Cap</td>
<td>Constituent</td>
<td>Daily</td>
<td>All currencies are available.</td>
<td>All return types are available.</td>
</tr>
<tr>
<td>Equal</td>
<td>Regional</td>
<td>Weekly</td>
<td>Hedging by currency is also available.</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>Sector</td>
<td>Quarterly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundamentals</td>
<td>Capping</td>
<td>Annually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weighting scheme of your choice</td>
<td>Scheme of your choice</td>
<td>Ad hoc</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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About S&P Dow Jones Indices

As the world’s largest resource for index-based innovation, data and research our mission is to bring independent, transparent and cost effective solutions to the global investment community. S&P Dow Jones Indices is at the forefront of index change and innovation. Our goal is to continue to anticipate and respond to how our clients see global investment opportunities.

Visit us at spdji.com/custom-indices

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