



**FTSE
RUSSELL**
An LSEG Business

FTSE Russell ESG Scores and Indices FAQ: update

29 August 2024

FTSE Russell would like to inform clients of the following updates.

The following FAQ have been updated to provide detail on current working practice:

1.6 When will my company be assessed?

The ESG research cycle runs from June to the following March each year. Companies are assessed once within each research cycle, if all disclosures relevant to the next consecutive fiscal year (following the fiscal year assessed for the previous assessment) are available. FTSE4Good Index Series [ground rule 8.2](#) explains the cut-off dates for the reports used in the FTSE ESG assessment, which is reflected in this FAQ.

In general, companies whose annual disclosures are published between April and September can expect to receive an invitation to review their new assessment by the first weekend of October. These assessments, including incorporation of any company feedback, will feed into the FTSE4Good December index review. Note that only company disclosures published by 30th September can be considered for assessments used in the December index review; in general, anything published after this time will be considered at the next company assessment.

Companies whose annual disclosures are published between October and March can expect to receive an invitation to review their new assessment by the first weekend of April. These assessments, including incorporation of any company feedback, will feed into the FTSE4Good June index review. Only company disclosures published by 31st March can be considered for assessments used in the June index review; in general, anything published after this time will be considered at the next company assessment.

Companies who participate in and report to CDP are likely to receive their new assessment in April, regardless of the timings of their other relevant annual disclosures. October or November is when CDP typically publishes the questionnaire data for each fiscal year, and as CDP information is material to a company's ESG Score, the assessment 'waits' for that key data to become available. These assessments will then be used in the June index review. However, if a CDP participant company elects to publish its CDP questionnaire data on its own website before the September cut-off date, this could feed into December index review if all other relevant annual disclosures for that same fiscal year are available.

ESG Scores results are available within the online portal after implementation of the Index reviews, approximately four weeks into each December or June.

For further information on FTSE Russell's corporate communication process, please refer to [Corporate engagement within sustainable investment](#) (Overview of FTSE Russell's corporate communication process: ESG scores data).

1.22 What sources of information do you assess?

Below are some of examples (not exhaustive) of the information sources used for assessments:

- Annual Report
- Securities Report
- Integrated Report
- Sustainability Report
- Corporate Governance Report
- ESG Performance Data
- Code of Conduct
- Articles of Association

- Environment Policy Statement
- Human right Policy
- Supplier Code of conduct/Procurement Policy
- AGM Notice
- AGM Results
- CDP Climate Change
- Corporate Website

In general, information made publicly available by a company on a corporate website is considered. CDP Climate Change data is considered if the response to CDP is submitted publicly. If a company has information only published on the website, this is considered if the information for the assessed fiscal year is available at the time of the assessment.

An updated version is now available using the following link:

[FTSE Russell ESG Scores and Indices \(lseg.com\)](https://www.lseg.com/en/ftse-russell)

Or on the FTSE Russell website: <https://www.lseg.com/en/ftse-russell>

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