



FTSE Russell Policy for Benchmark Methodology Changes - update

28 September 2023

FTSE Russell has clarified the FTSE Russell Policy for Benchmark Methodology Changes as follows:

Section 2: Standard Indices

Addition of Rule 2.2.4

For standard indices with few users (which are not supported by external advisory committees), FTSE Russell reserves the right to consult those users for feedback on potential changes to index methodology. These discussions should not be viewed as confirmation that will ultimately result in a rule change. The final approval of an index methodology change is made by the FTSE Russell Index Governance Board

Section 3: Custom Indices

Addition of Rule 3.1.3

For custom indices with few users, FTSE Russell reserves the right to consult those users for feedback on potential changes to index methodology. These discussions should not be viewed as confirmation that will ultimately result in a rule change. The final approval of an index methodology change is made by the FTSE Russell Index Governance Board.

Section 4: Bespoke Indices

Addition of Rule 4.2.2

Proposals for amendments to the methodology of a bespoke index may be initiated by either the client or FTSE International Limited.

An updated version of the FTSE Russell Policy for Benchmark Methodology Changes (v2.2) is available via the following link: [FTSE_Russell_Policy_for_Benchmark_Methodology_Changes.pdf](#)

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