

SUSA

iShares MSCI USA ESG Select ETF

Fund Description

SUSA tracks an index of US companies with high environmental, social and governance (ESG) factor scores as calculated by MSCI.

FactSet Analyst Report

SUSA offers socially conscious exposure to US large- and midcap equities. It holds MSCI USA companies with the highest ESG ratings, determined by the degree to which they reflect socially conscious values with regard to the environment, society, and corporate governance. As such, companies with tobacco and civilian firearms involvement as well as those with low MSCI ESG controversies score are excluded from the index. SUSA weights its holdings in proportion to their ESG scores. At the same time, the fund caps security weights at 5% and limits sector deviation from the broader MSCI USA index to 3%, ensuring that the fund doesn't deviate far from the equity market. Index constituents are reviewed on a quarterly basis. The fund traded under the ticker KLD until July 2017. Prior to June 1, 2018, the fund tracked the MSCI USA ESG Select Index.

