

SUSL

iShares ESG MSCI USA Leaders ETF

Fund Description

SUSL tracks an index of US large- and mid-cap firms with the highest ESG ratings, weighted by market-cap within each sector buckets.

FactSet Analyst Report

SUSL offers exposure to large- and mid-cap US firms with favorable ESG traits relative to their sectors. Its underlying index starts its selection with the MSCI USA Index (parent index), and it then removes firms involved with major business controversies as well as companies engaged in tobacco, alcohol, gambling, nuclear power and certain weapons. As the extended version of the MSCI ESG Leaders Index, the fund further excludes producers and major retailers of firearms. Firms passing this screen are assigned with an ESG score with adjustments for sector and cap weight. The fund removes firms with lower rankings. At triannual rebalance, the fund selects about half the available market cap in each sector, emphasizing higher ESG ratings and larger firms. Beyond the sector alignment, SUSL does not attempt to outdo the risk and return of the parent Index.

