

USXF

iShares ESG Advanced MSCI USA ETF

Fund Description

USXF tracks an index of large- and mid-cap US equities screened for positive environmental, social and governance rating while also screening for involvement in controversial activities.

FactSet Analyst Report

USXF is passively managed to invest in US equities with above average ESG ratings relative to its sector peers. The underlying index starts with the MSCI USA Index (the parent) and excludes companies engaged in controversial activities like nuclear weapons, genetic engineering, palm oil, private prisons, and predatory lending. Firms in the energy sector per GICS methodology, including those involved in fossil fuels, reserve ownership, related revenues and power generation are also excluded, with the exception of firms having bulk of their revenues tied to alternative energy. The remaining companies are ranked based on a sector-specific ESG Key Issues (e.g. carbon emissions) selection and weighting model, only those with above average scores (BBB and up) are selected. The market cap-weighted index is reviewed quarterly and excludes small-cap firms.

