

XVV

iShares ESG Select Screened S&P 500 ETF

Fund Description

XVV tracks a market cap-weighted index of US large-caps caps screened for sustainability and excluding those with exposure to certain controversial business activities.

FactSet Analyst Report

XVV is part of an iShares suite that offers ESG take on S&P indices. It starts with the S&P 500 and screens out companies over a certain threshold level of involvement in tobacco, controversial weapons, and involvement with fossil-fuels. Companies are evaluated based on their involvement in certain controversial business activities. Excluded are those holding reserves of coal, oil, natural gas or shale, and companies deemed non-compliant with the UNGC principles. Companies are also evaluated for governance controversies, such as economic crime, corruption, fraud, human rights abuses, labor disputes, workplace safety, catastrophic accidents and environmental disasters. Those flagged on any of these issues may be removed from the index and remain ineligible for reentry for up to one year. Exclusions are reviewed at each quarterly rebalance. Prior to February 19, 2025, the fund name was iShares ESG Screened S&P 500 ETF.

