

Frequently Asked Questions

beS&P™ Index Solutions

- 1. What is beS&P?** S&P Dow Jones Indices' (S&P DJI) beS&P offering brings new, customer-driven index concepts to life. Leveraging our world-class index governance framework and unmatched indexing expertise, we work with customers to launch indices that comply with applicable regulatory standards and industry best practices while tapping into targeted, less standard exposures. Through beS&P, customers can provide input into an index methodology designed by S&P DJI. beS&P is a separate offering from [S&P DJI's custom index solutions](#).
- 2. What types of customers might be interested in beS&P solutions?** The beS&P offering is capable of being used across a broad spectrum of customers. We see interest from customers seeking to apply their own sustainability requirements, particularly with regard to specific security-level exclusions based on their specific theme or objective.
- 3. What is the customer's role in beS&P indices?** Customers may have input into discrete aspects of the index methodology at the inception of the index and on an ongoing basis. Examples of these aspects can include defined screens, thresholds of exclusion and exclusion lists. Aspects under the customer's control will be rules based and fully disclosed in the beS&P index methodology, including the name of the customer. Customers will need appropriate mechanisms in place to ensure the ongoing integrity of the index aspects under its control.
- 4. How is S&P DJI involved in the development of beS&P indices?** Due to the bespoke nature of beS&P indices, there is no "one size fits all" approach to developing these indices. As such, the [S&P DJI R&D Services](#) and [S&P DJI Index Governance](#) teams are involved in designing all new beS&P indices to ensure they are robust and fit to meet the index objectives.
- 5. What other roles does S&P DJI play in beS&P indices?** S&P DJI is the index sponsor and benchmark administrator of beS&P indices.

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- 6. How are beS&P indices branded?** beS&P indices carry S&P DJI trademarks. Branding is differentiated from traditional S&P DJI indices through the use of the beS&P brand in the index name. Any customer discretion and/or determination of the index will be fully disclosed in the index methodology. The customer's name will be included in the index methodology in addition to a description of the customer's role in providing input into the index construction and/or maintenance. If applicable, there may also be a link in the index methodology to a customer-owned website where the customer details the aspect of its methodology under its control, such as a securities exclusion list.
- 7. What is the index governance process for beS&P indices?** An internal S&P DJI Index Committee governs each beS&P index. Index Committees comprise full-time professional members of S&P DJI staff. At each meeting, the Index Committee may review pending actions that may affect index constituents, statistics comparing the composition of the indices to the market, securities being considered as candidates for addition to an index and any significant market events. In addition, the Index Committee may revise index policies.
- 8. How often are beS&P indices reviewed?** In addition to the daily maintenance and calculation of an index by S&P DJI's index operations, each index methodology is reviewed at least once in any 12-month period by the Index Committee to ensure the indices continue to achieve the stated objectives and that the data and methodology remain effective.
- 9. How are beS&P index methodology changes handled?** S&P DJI conducts consultations on proposals to make material changes to the index methodology. For index methodology aspects controlled by the customer, the customer will inform S&P DJI prior to making any significant changes together with the rationale, which is necessary for S&P DJI to assess the potential impact, if any, on the index. A significant change to the aspect of the index methodology under the control of a customer may require a consultation with index users.
- 10. Will the index methodology of beS&P indices be publicly available?**
Index methodology availability will be subject to the beS&P index's intended use. Customers may request that the specific beS&P index methodology be posted on www.spglobal.com/spdji.
- 11. How can I find out more information?** To learn more about working with S&P DJI to create beS&P indices, please contact index_services@spglobal.com.

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