

## ESG Data: Access for Students and Employees at the University of Zurich

<b>Bloomberg ESG</b>	
Access	<ul style="list-style-type: none"> <li>• Access on two Bloomberg Terminals in the “Bibliothek für Betriebswirtschaft”</li> <li>• Access is available for students and employees of the University of Zurich only</li> </ul>
How to access	<ol style="list-style-type: none"> <li>1. Ask the person at the front desk of the “Bibliothek für Betriebswirtschaft” to log you in at one of the Bloomberg Terminals</li> <li>2. Login with your account or create a new account (you need an own account)</li> <li>3. Search in the search field on the top for your company of interest</li> <li>4. A menu screen pops up, click on “7) FA Financial Analysis”</li> <li>5. On the top, you will see a list of templates. Click on “8) ESG” to access the ESG data (find the definition of a data point by right clicking on its name and choose “Definition...”)</li> <li>6. You can export the data as a PDF or Excel file by clicking on “97) Export” on the red bar</li> </ol> <ul style="list-style-type: none"> <li>• You can extract ESG data for example for each company of an entire index. To do this, search the index in the search field, click on "10 MEMB" and manually add data points of your interest by searching for its name (e.g. ESG Disclosure Score) in the yellow search field that you find above the column names. Data export is possible (see under point 6)</li> <li>• Further useful information and functions to obtain ESG related information and ESG data can be found <a href="#">here</a> (for useful shortcuts see <a href="#">here</a>)</li> <li>• Bloomberg offers a help chat. With a double click on the help button (on the keyboard) the chat can be activated</li> </ul>
further Information	<ul style="list-style-type: none"> <li>• ESG Disclosure Scores and further ESG data. Bloomberg also provides scores from third party rating agencies (RobecoSam, Sustainalytics, ISS Quality Score and CDP Climate Disclosure Score)</li> <li>• globally for over 11'500 companies, data since 2005 (depending on company)</li> <li>• Please note that Bloomberg has a monthly limit for downloading data to Excel. Once a terminal reaches the limit, no more data can be downloaded for the rest of the month</li> </ul>

<b>Thomson Reuters Eikon</b>	
Access	<ul style="list-style-type: none"> <li>• Access on computers in the “Bibliothek für Betriebswirtschaft”</li> <li>• Access is available for students and employees of the University of Zurich only</li> </ul>
How to access	<ol style="list-style-type: none"> <li>1. Ask the person at the front desk of the “Bibliothek für Betriebswirtschaft” to log you in at one of the designated computers with access to Thomson Reuters</li> <li>2. When you open Thomson Reuters, the latest used workspace appears</li> <li>3. Create a new workspace by clicking on the symbol with the three lines next to the current workspace in the top right corner and select "New Workspace"</li> <li>4. Search for your company of interest in the search field in the top left corner</li> <li>5. A new window opens</li> <li>6. Click on “ESG” on the task bar below the company’s name to access the ESG data (find the definition of a data point by clicking on the question mark icon next to data point name)</li> <li>7. You can export the data as PDF or Excel file by clicking on the corresponding icon below the top right corner</li> </ol> <ul style="list-style-type: none"> <li>• To compare ESG Data between peers click on “Peers &amp; Valuation” on the task bar below the company’s name (as in point 6) and manually add the data points of your interest. Additionally, it is possible to edit the list of peers.</li> <li>• The Excel program on these Thomson Reuters computers provides pre-defined Excel templates, which directly extract ESG data for a company or peer comparison. To use them click on tab Thomson Reuters &gt; Templates. On the appearing window, select the category “Env &amp; Social Governance”. There you find several ESG related templates (e.g. “ESG – Company Data” or “ESG – Peer Comparison”). To adjust the company/-ies and data points of interest, follow the guidance on the sheet “Introduction” of the template. Further instructions can be found <a href="#">here</a></li> <li>• Tutorials regarding ESG data can be found <a href="#">here</a></li> </ul>
further Information	<ul style="list-style-type: none"> <li>• ESG Scores and other ESG data (data from Refinitiv (former Asset4))</li> <li>• globally for over 7000 companies; ESG data since 2002</li> </ul>

<b>KLD (today: MSCI)</b>	
Access	<ul style="list-style-type: none"> <li>• Wharton Interface (WRDS) access through a unitary surface</li> <li>• A personal Wharton Interface account can only be obtained by PhD students, senior assistants and professors (who are either matriculated or employed at the University of Zurich) as well as students writing a thesis or papers with a UZH-professor (register for a WRDS Account <a href="#">here</a>)</li> <li>• for any other KLD data request follow the steps described under “how to access”</li> </ul>
How to access	<p>The easiest way is to access the data through a sharedrive provided by the Department of Banking and Finance:</p> <ol style="list-style-type: none"> <li>1. To get access to the sharedrive carefully read through the <a href="#">MSCI Confidentiality Agreement</a>, fill in your name, date and sign it</li> <li>2. Send the signed document to <a href="mailto:julian.koelbel@bf.uzh.ch">julian.koelbel@bf.uzh.ch</a></li> <li>3. If you get the OK, attach the email and write to <a href="mailto:hotline@bf.uzh.ch">hotline@bf.uzh.ch</a> who will give you access to the sharedrive</li> <li>4. To access the sharedrive connect with your VPN or with the WiFi of UZH</li> <li>5. Enter the following link into your explorer: for Windows: <code>\\idnetapp-ibf.uzh.ch\g_ibf_data\$\CommonShare\Research\MSCI_ESG_KLD\reports</code> for Mac: <code>smb://idnetapp-ibf.uzh.ch/g_ibf_data\$/CommonShare/Research/MSCI_ESG_KLD/reports</code></li> <li>6. The Excel files contain the same data as provided on WRDS. An overview of the data, data point definitions and further information can be found in the PDF file “MSCI ESG KLD STATS_1991-2015 Data Set_Methodology”</li> </ol> <ul style="list-style-type: none"> <li>• Alternatively, the data can be accessed through an own account on WRDS</li> <li>• for questions please contact the WRDS Representative by email: <a href="mailto:wrds@bf.uzh.ch">wrds@bf.uzh.ch</a></li> </ul>
further Information	<ul style="list-style-type: none"> <li>• ESG Data focusing on risk</li> <li>• globally for up to 2600 companies, data between 1991 and 2015</li> <li>• for more information about subscribed licenses see <a href="#">here</a></li> <li>• for <b>legal aspects</b>, which have to be met see <a href="#">here</a></li> </ul>

- for legal aspects, the use of databases, further Information and more accessible databases provided by the Institute for Banking and Finance and the University of Zurich please see: <https://www.bf.uzh.ch/en/research/databases.html>