REFINITIV DATA PLATFORM

ESG BULK POINT IN TIME USER GUIDE

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REFINITIV®

An LSEG Business

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1 Introduction

This document provides details of the Point in time (PIT) bulk service that is provided to the Environmental, Social and Governance (ESG) bulk delivery capability.

This service provides the ESG Measures data with Point in time history for each of the companies in the ESG universe.

In order to concord ESG content with the customer entity master and with other Refinitiv content sets, entity symbology and reference content, this document should be used in conjunction with the Refinitiv Data Platform ESG Symbology User Guide.

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2 About the files

Each week updates to the Environmental, Social and Governance (ESG) Point in time data are delivered to Refinitiv Data Platform (RDP). Refinitiv Bulk files are distributed in csv format, with the file extension .csv.

Two types of data updates are available.

- A full set of csv data files containing all history for all data items and all organizations.
- A delta csv data file that contains only incremental changes to the universe since last week.

Full Initialization Files
One zip file is created containing all organizations for one year of history. Both active and inactive organizations are included in the data file. Each zip file contains a separate csv file for each organization

Delta Files
An incremental update is generated for each value that has changed since last week. The incremental update will contain only the values for an organization and period that have changed. Each zip file contains a single csv file containing all created/modified or deleted data for all organizations.

ESG PIT Files are published each Monday by 9am UTC.

The ESG csv files are zipped and delivered as .zip files. The following naming convention is used for the .zip files:

2.1 Full Files

PackageFiletype.Year.UpdateType.DateTime

Package	Filetype	Year	UpdateType	DateTime
EsgPIT	AnalyticValue or AnalyticValueScore or Scores or Values or ValueScores	yyyy	F	yyyy-mm-dd-hhmm

2.2 Incremental/Delta Files

PackageFiletype.UpdateType.DateTime

Package	FIletype	UpdateType	Date
EsgPIT	AnalyticValue or AnalyticValueScore or Scores or Values or ValueScores	I	yyyy-mm-dd-hhmm

File Types
There are 5 different types of files supporting 5 different types of dataitem. A glossary for ESG Point in time values is available in My Refinitiv. This glossary details which items are included within each file, and how far back the point in time history can be populated for each item. Fiscal history is available for each of these files since 2002.

File Type	Description	Point in time history available from
AnalyticValue	Files contain point in time values for all fields marked in the ESG glossary as Indicators	2013
AnalyticValueScore	Files contain point in time values for all scores assigned to the fields marked in the glossary as Indicators. Scores are only calculated for Indicators that contribute towards the calculation of ESG Scores	June 2021
Scores	Files contain point in time values for all ESG Scores	Summary Scores – 2017 Pillar Scores – June 2021 Category Scores - 2017
Values	Files contain point in time values for all fields marked in the ESG glossary as datapoints	2008
ValueScores	Files contain point in time values for all scores assigned to the fields marked in the glossary as datapoints. Scores are only calculated for datapoints that contribute towards the calculation of ESG Scores	June 2021

Year
Initialization/Full files are partitioned by fiscal year, all companies for that fiscal year are included in the zip file. Delta/incremental files do not use the fiscal year partition.

UpdateType
There are two update types

Code	Description	Notes
F	Initialization	Full initialization file of all data for all organizations
I	Delta incremental	Delta files contain only the items that changed within the past week.

Date
The date the file starts the generation process in the format yyyy-mm-dd-hhmm.

The following examples illustrate the naming convention

EsgPITAnalyticValueScore.2017.F.2023-06-26-0611
An ESG full initialization file containing Scores for indicators that contribute towards the ESG , for all companies for the 2017 period. The file generation began on 26th June 2023.

EsgPITValues.I.2023-06-19-0407
An ESG delta file containing all the datapoints that changed in the past week, for all companies and all periods. The file generation began on 19th June 2023.

Files will remain accessible for 2 weeks before being removed. The zipped files can be uncompressed using standard tools such as 7-zip

3 How to access the files

File Distribution, also known as Client File Store (CFS), is a service of the Refinitiv Data Platform (RDP) that aids in the discovery and delivery of files to subscribers via web-based REST APIs. Refinitiv publish bulk ESG files to the File Store.

For additional details on the File Distribution Service, please see the *CFS Subscriber User Guide*. This document introduces the CFS REST API and describes the working environment and supporting resources. It is available in the Developers Portal.

This section supplements *CFS Subscriber User Guide* with ESG-specific information.

bulk-ESG is the bucket name required in section 3.2.1 Finding Buckets of the *CFS Subscriber User Guide*.

The ESG PIT data is delivered through 1 fileset using the following package and fileset name.

Subscribers will be able to see all files, but only permitted to download the ESG PIT files if they have an active subscription.

3.1 PIT data packages

Package Name: RFT-ESG-PIT

Fileset Name	Description	Code to retrieve filesets
RFT-ESG-PIT-SDI-yyyy-mm-dd	An ESG PIT fileset, containing all data for all companies and all periods.	https://api.refinitiv.com/file-store/v1/file-sets?bucket=bulk-ESG&packageId=4173-aec7-8a0b0ac9-96f9-48e83ddbd2ad

4 About the Content

4.1 Overview

An OrganizationId uniquely identifies each organization. These identifiers are generated and maintained by Refinitiv. They do not change over time and are never re-used.

OrganizationId will be impacted by certain events such as mergers, acquisitions.

A merger or acquisition that involves two entities and causes a new entity to be created. Both existing OrganizationId's are considered inactive, and the new entity is given its own unique OrganizationId.

One original entity survives as the new, merged entity, will retain the original OrganizationId.

Organization changes status from public to private, the OrganizationId can change, all history will be copied over onto the new OrganizationId..

The Environmental, Social and Governance (ESG) service includes all Organizations which have Refinitiv ESG content available.

4.2 ESG Coverage

The point in time files contain all data points, indicators and scores, as detailed in the Refinitiv ESG Point in Time Glossary, published in MyRefinitiv.
Not all ESG datapoints are available in the point in time files, the details of those available are identified in the glossary.

4.3 Anti-Takeover Devices (ATD) Coverage

Organizations flagged as being part of the ATD population are limited to updates in the following fields. Due to the limited nature of these fields you may choose to exclude ATD Organizations from your processes.

Full details pertaining to these fields can be found in the Refinitiv ESG Glossary.

Pillar	Category	RDPFieldName
Governance	Shareholders	UnlimitedAuthorizedCapitalorBlankCheck
Governance	Shareholders	ClassifiedBoardStructure
Governance	Shareholders	StaggeredBoardStructure
Governance	Shareholders	SupermajorityVoteRequirement
Governance	Shareholders	GoldenParachute
Governance	Shareholders	LimitedShareholderRightstoCallMeetings
Governance	Shareholders	EliminationofCumulativeVotingRights
Governance	Shareholders	PreEmptiveRights
Governance	Shareholders	CompanyCrossShareholding
Governance	Shareholders	ConfidentialVotingPolicy
Governance	Shareholders	LimitationofDirectorLiability
Governance	Shareholders	ShareholderApprovalSignificantTransactions
Governance	Shareholders	FairPriceProvision
Governance	Shareholders	LimitationsonRemovalofDirectors
Governance	Shareholders	AdvanceNoticeforShareholderProposals
Governance	Shareholders	AdvanceNoticePeriodDays
Governance	Shareholders	WrittenConsentRequirements
Governance	Shareholders	ExpandedConstituencyProvision

4.4 Datafile columns

ColumnName	Description	EsgPIT Values	EsgPIT Value Scores	Analytic Value	Analytic Value Score	Scores
OrganizationId	Organization Permanent Identifier identifying the organization to which the ESG values pertain.	Yes	Yes	Yes	Yes	Yes
FinancialPeriodId	Financial Period ID for the ESG analytic score.	Yes	Yes	Yes	Yes	Yes
PeriodEndDate	The period end date of the ESG report in the format YYYY-MM-DD.	Yes	Yes	Yes	Yes	Yes
PeriodType	Periodicity for the record entry: Year	Yes	Yes	Yes	Yes	Yes
Year	The fiscal year of a record's periodicity	Yes	Yes	Yes	Yes	Yes
IsPartial	If 1, not all ESG information has been collected for the whole Financial Period. Refinitiv publish ESG collected data as soon as it is published. Once all data has been collected for a period, this field will be marked as 0.	Yes	Yes			
ItemCode	The Refinitiv Data Platform (RDP) Name for the ESG field. A full list of measures can be found in the Refinitiv ESG Glossary, published in MyRefinitiv.	Yes	Yes	Yes	Yes	Yes
EsgAnalyticValue	Numeric value for the ESG Indicators			Yes		
EsgValueScore	Numeric value for the ESG Scores.		Yes			
EsgValue	Numeric value for the ESG datapoints. Boolean fields are included as 0/1	Yes				
EsgAnalyticValueScore	Numeric value for the score.				Yes	Yes
Currency	Currency for the ESG Value, where applicable. Currencies are published as Refinitiv PermId's. A static Reference file is available to convert the Refinitiv PermId's to ISO Codes.	Yes		Yes		
EsgAnalyticValueScoreGrade	The ESG Score converted into a Grade					Yes
EsgStringValue	String values for the ESG datapoints.	Yes				
ChangeType	Point in time change flag. N – New - All values entered for the first time. C – Correction - change in value is due to a collection error R – Restatement - Change in value is due to a company re-statement	Yes				
EntryDate	The date of the entry when the ESG Value was collected in the format YYYY-MM-DDTHH:mm:ss.SSSZ	Yes				
EffectiveFromDate	The date of the entry from where the ESG Value change was detected or effective in the format YYYY-MM-DDTHH:mm:ss.SSSZ		Yes	Yes	Yes	Yes
EffectiveToDate	The date from entry where the ESG Value change was detected until the date of next changes to the value in the format YYYY-MM-DDTHH:mm:ss.SSSZ	Yes	Yes	Yes	Yes	Yes
Action (in delta files only)		Yes	Yes	Yes	Yes	Yes

4.5 Datafile layouts

4.5.1 EsgPITValues

ColumnName	Key	DataType	IS_NULLABLE
OrganizationId	PK	BIGINT	NO
FinancialPeriodId	PK	INT	NO
PeriodEndDate		Date	NO
PeriodType		Varchar (20)	NO
Year		INT	NO
IsPartial		BIT	YES
ItemCode	PK	Varchar (40)	NO
EsgValue		Float	YES
Currency		BIGINT	YES
EsgStringValue		Varchar (Max)	YES
ChangeType		Char (1)	YES
EntryDate	PK	DateTime	NO
EffectiveToDate		DateTime	YES

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValue	Currency	EsgStringValue	ChangeType	EntryDate	EffectiveToDate
4295869198	375	31/12/2019	Year	2019	FALSE	OzoneDepletingSubstances	28.0	null	null	N	2020-03-20T21:40:46.46Z	2021-05-31T16:00:42.42Z
4295869198	375	31/12/2019	Year	2019	FALSE	OzoneDepletingSubstances	26.0	null	null	R	2021-05-31T16:00:42.42Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	NOxSOxEmissionsReduction	10534.0	null	null	N	2020-03-20T21:40:45.45Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	SOxEmissions	1982.0	null	null	N	2020-03-20T21:40:47.47Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	VocEmissions	4496.0	null	null	N	2020-03-20T21:40:47.47Z	null

4.5.2 EsgPITValueScores

ColumnName	Key	DataType	IS_NULLABLE
OrganizationId	PK	BIGINT	NO
FinancialPeriodId	PK	INT	NO
PeriodEndDate		Date	NO
PeriodType		Varchar (20)	NO
Year		INT	NO
IsPartial		BIT	YES
ItemCode	PK	Varchar (40)	NO
EsgValueScore		Float	YES
EffectiveFromDate	PK	DateTime	NO
EffectiveToDate		DateTime	YES

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValueScore	EffectiveFromDate	EffectiveToDate
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5847457627118644	2021-06-27T00:00:00.00Z	2021-08-15T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5864978902953587	2021-08-15T00:00:00.00Z	2021-08-22T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5843881856540084	2021-08-22T00:00:00.00Z	2021-09-26T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5864978902953587	2021-09-26T00:00:00.00Z	2021-10-03T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5843881856540084	2021-10-03T00:00:00.00Z	2021-10-17T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5840336134453782	2021-10-17T00:00:00.00Z	2021-11-14T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5843881856540084	2021-11-14T00:00:00.00Z	2021-11-21T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyEmissions	0.5864978902953587	2021-11-21T00:00:00.00Z	null

4.5.3 AnalyticValue

ColumnName	Key	DataType	IS_NULLABLE
OrganizationId	PK	BIGINT	NO
FinancialPeriodId	PK	INT	NO
PeriodEndDate		Date	NO
PeriodType		Varchar (20)	NO
Year		INT	NO
ItemCode	PK	Varchar (40)	NO
EsgAnalyticValue		Float	YES
Currency		BIGINT	YES
EffectiveFromDate	PK	DateTime	NO
EffectiveToDate		DateTime	YES

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	ItemCode	EsgAnalyticValue	Currency	EffectiveFromDate	EffectiveToDate
4295869198	375	31/12/2019	Year	2019	BoardMemberAffiliations	1.66666667	null	2020-09-27T00:00:00.00Z	2021-05-16T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	BoardMemberAffiliations	1.71428571	null	2021-05-16T00:00:00.00Z	null
4295869198	375	31/12/2019	Year	2019	BoardIndividualReElection	1.0	null	2020-03-29T00:00:00.00Z	null
4295869198	375	31/12/2019	Year	2019	ExecutiveCompensationPolicy	1.0	null	2020-03-29T00:00:00.00Z	null
4295869198	375	31/12/2019	Year	2019	ExecutiveIndividualCompensation	0.0	null	2020-03-29T00:00:00.00Z	null
4295869198	375	31/12/2019	Year	2019	HighestRemunerationPackage	3948162.0	500110	2020-03-29T00:00:00.00Z	null
4295869198	375	31/12/2019	Year	2019	BoardMemberCompensation	375109.02	500110	2020-03-29T00:00:00.00Z	null
4295869198	375	31/12/2019	Year	2019	ExecutiveCompensationLinkToObjectives	0.0	null	2020-03-29T00:00:00.00Z	null

4.5.4 AnalyticValueScore

ColumnName	Key	DataType	IS_NULLABLE
OrganizationId	PK	BIGINT	NO
FinancialPeriodId	PK	INT	NO
PeriodEndDate		Date	NO
PeriodType		Varchar (20)	NO
Year		INT	NO
ItemCode	PK	Varchar (40)	NO
EsgAnalyticValueScore		Float	YES
EffectiveFromDate	PK	DateTime	NO
EffectiveToDate		DateTime	YES

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	ItemCode	EsgAnalyticValueScore	EffectiveFromDate	EffectiveToDate
4295869198	375	31/12/2019	Year	2019	CompensationCommitteeManagementIndependence	0.5052083333333334	2021-11-28T00:00:00.00Z	null
4295869198	375	31/12/2019	Year	2019	NominationCommitteeIndependence	0.5300751879699248	2021-06-27T00:00:00.00Z	2021-07-18T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	NominationCommitteeIndependence	0.5335820895522388	2021-07-18T00:00:00.00Z	2021-10-10T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	NominationCommitteeIndependence	0.5333333333333333	2021-10-10T00:00:00.00Z	null

4.5.5 Scores

ColumnName	Key	DataType	IS_NULLABLE
OrganizationId	PK	BIGINT	NO
FinancialPeriodId	PK	INT	NO
PeriodEndDate		Date	NO
PeriodType		Varchar (20)	NO
Year		INT	NO
ItemCode	PK	Varchar (40)	NO
EsgAnalyticValueScore		Float	YES
EsgAnalyticValueScoreGrade		Varchar(5)	Yes
EffectiveFromDate	PK	DateTime	NO
EffectiveToDate		DateTime	YES

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	ItemCode	EsgAnalyticValueScore	EsgAnalyticValueScoreGrade	EffectiveFromDate	EffectiveToDate
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.814713620724549	A-	2021-06-27T00:00:00.00Z	2021-07-04T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.803784658975915	A-	2021-07-04T00:00:00.00Z	2021-07-11T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.806334750050597	A-	2021-07-11T00:00:00.00Z	2021-07-18T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.799060860673957	A-	2021-07-18T00:00:00.00Z	2021-08-08T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.800153812348934	A-	2021-08-08T00:00:00.00Z	2021-09-05T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.803757415952537	A-	2021-09-05T00:00:00.00Z	2021-10-03T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.805894428152492	A-	2021-10-03T00:00:00.00Z	2021-10-10T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.806763562185248	A-	2021-10-10T00:00:00.00Z	2021-10-17T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.805705361127047	A-	2021-10-17T00:00:00.00Z	2021-10-31T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.806677235256816	A-	2021-10-31T00:00:00.00Z	2021-11-21T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.806649528168793	A-	2021-11-21T00:00:00.00Z	2021-11-28T00:00:00.00Z
4295869198	375	31/12/2019	Year	2019	GovernancePillarScore	0.80656499500998	A-	2021-11-28T00:00:00.00Z	null

4.5.6 Delta datafile

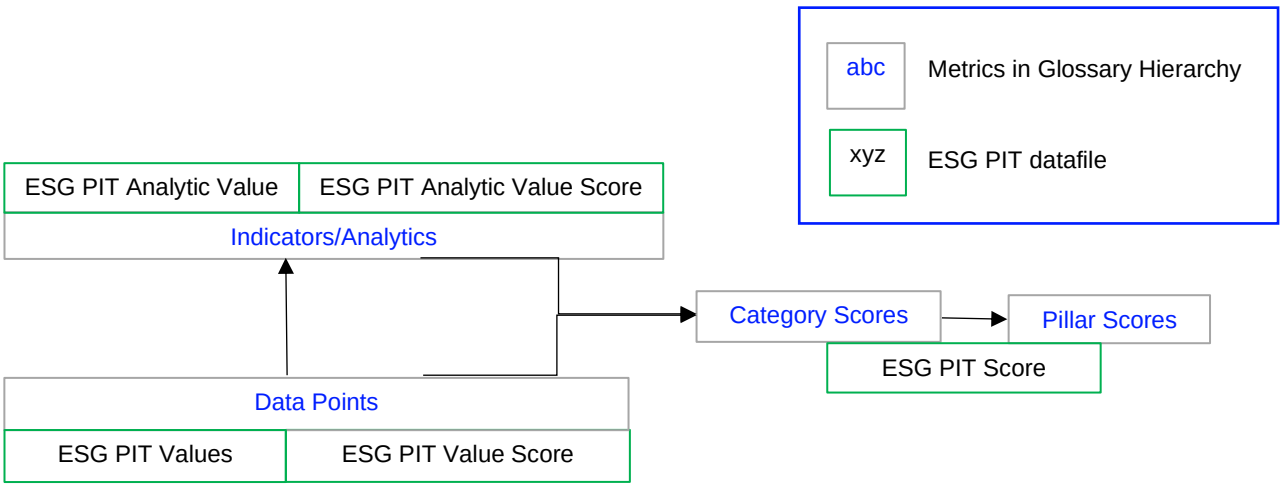
Delta files follow the same format as the Full files, with an additional final column titled: 'Action'
The action column indicates whether a row should be overwritten or inserted.

Action	Key
O	Overwrite
I	Insert

E.g.

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	ItemCode	EsgAnalyticValueScore	EsgAnalyticValueScoreGrade	EffectiveFromDate	EffectiveToDate	Action
4295533401	132	31/12/2017	Year	2017	ESGCombinedScore	0.328791419	C-	31/10/2021	07/11/2021	O
4295533401	132	31/12/2017	Year	2017	ESGCombinedScore	0.329076871	C-	07/11/2021	null	I

4.6 PIT Datafile to Glossary



4.7 CSV Samples

There are 6 types of data item that can be included.

String, Integers, Decimals, Boolean, Monetary amounts with ISO currency and country codes

Values that are string:

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValue	Currency	EsgStringValue	ChangeType	EntryDate	EffectiveToDate	ActionType
4295863328	271	31/12/2020	Year	2020	FALSE	Iso14000OrEms	null	null	ISO 14000	N	2021-10-30T05:36:47.47Z	null	I
4295894528	166	30/06/2021	Year	2021	FALSE	Iso14000OrEms	null	null	ISO 14000	N	2021-10-28T13:28:37.37Z	null	I
4295903093	390	31/12/2020	Year	2020	FALSE	Iso14000OrEms	null	null	ISO 14000	N	2021-10-30T05:17:47.47Z	null	I
4295893576	294	31/12/2020	Year	2020	FALSE	Iso14000OrEms	null	null	ISO 14000	N	2021-11-01T13:44:40.40Z	null	I
4295873202	225	31/03/2021	Year	2021	FALSE	Iso14000OrEms	null	null	ISO 14000	N	2021-10-28T04:22:26.26Z	null	I
4295909008	237	31/12/2020	Year	2020	TRUE	Iso14000OrEms	null	null	ISO 14000	N	2021-11-04T09:16:03.03Z	null	I
5047748878	46	30/06/2021	Year	2021	FALSE	Iso14000OrEms	null	null	ISO 14000	N	2021-10-30T04:20:20.20Z	null	I

Values that are integers:

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValue	Currency	EsgStringValue	ChangeType	EntryDate	EffectiveToDate	ActionType
4295885816	207	30/06/2019	Year	2019	FALSE	AccidentsTotal	17	null	null	N	2021-11-12T14:40:13.13Z	null	I
4295885816	176	30/06/2017	Year	2017	FALSE	AccidentsTotal	32	null	null	N	2021-11-12T14:40:12.12Z	null	I
4295885816	194	30/06/2018	Year	2018	FALSE	AccidentsTotal	25	null	null	N	2021-11-12T14:40:12.12Z	null	I
5064663797	41	31/12/2019	Year	2019	FALSE	AccidentsTotal	0	null	null	N	2020-08-14T06:43:55.55Z	2021-11-07T01:48:15.15Z	I
5064663797	41	31/12/2019	Year	2019	FALSE	AccidentsTotal	322	null	null	C	2021-11-07T01:48:15.15Z	null	I
4295905599	368	31/12/2019	Year	2019	FALSE	AccidentsTotal	897	null	null	N	2021-11-04T09:18:42.42Z	null	I
5051002182	21	30/06/2018	Year	2018	FALSE	AccidentsTotal	6	null	null	N	2020-12-07T18:41:31.31Z	2021-11-04T10:53:38.38Z	I
5051002182	21	30/06/2018	Year	2018	FALSE	AccidentsTotal	3	null	null	C	2021-11-04T10:53:38.38Z	null	I

Values that are decimals:

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValue	Currency	EsgStringValue	ChangeType	EntryDate	EffectiveToDate	ActionType
4298007739	143	30/06/2019	Year	2019	FALSE	EmployeeSatisfaction	0.66	null	null	N	2021-11-12T15:13:27.27Z	null	I
4298007739	150	30/06/2020	Year	2020	FALSE	EmployeeSatisfaction	0.66	null	null	N	2021-11-12T15:13:27.27Z	null	I
4295903453	533	31/12/2020	Year	2020	FALSE	EmployeeSatisfaction	0.884	null	null	N	2021-11-07T01:11:07.07Z	null	I
4295893827	59	31/03/2021	Year	2021	FALSE	EmployeeSatisfaction	0.67	null	null	N	2021-07-08T21:48:54.54Z	null	I
5038915059	216	31/12/2020	Year	2020	TRUE	EmployeeSatisfaction	0.85	null	null	N	2021-11-12T14:30:15.15Z	null	I
4295860619	398	02/01/2021	Year	2020	FALSE	EmployeeSatisfaction	0	null	null	N	2021-11-11T04:57:31.31Z	null	I

Values that are Boolean

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValue	Currency	EsgStringValue	ChangeType	EntryDate	EffectiveToDate
4295869198	375	31/12/2019	Year	2019	FALSE	SuccessionPlan	1.0	null	null	N	2020-03-20T21:40:28.28Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	ExternalConsultants	1.0	null	null	N	2020-03-20T21:41:03.03Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyBoardSize	1.0	null	null	N	2020-03-20T21:40:30.30Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyBoardIndependence	1.0	null	null	N	2020-03-20T21:40:30.30Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyBoardDiversity	1.0	null	null	N	2020-03-20T21:40:29.29Z	null
4295869198	375	31/12/2019	Year	2019	FALSE	PolicyBoardExperience	1.0	null	null	N	2020-03-20T21:40:30.30Z	null

Values that are ISO Country

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValue	Currency	EsgStringValue	ChangeType	EntryDate	EffectiveToDate	ActionType
4295867424	281	30/06/2021	Year	2021	FALSE	CriticalCountry	null	null	100076	N	2021-11-04T06:09:37.37Z	null	I
4295887083	233	31/12/2020	Year	2020	TRUE	CriticalCountry	null	null	100076	N	2021-11-04T10:01:49.49Z	null	I
4295856053	372	31/12/2020	Year	2020	TRUE	CriticalCountry	null	null	"100076,100140,100293"	N	2021-11-07T01:25:35.35Z	null	I

The string value contains an array of Refinitiv PermId's which can be converted to ISO, using the country cross reference file.

Values that are ISO Currency

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	IsPartial	ItemCode	EsgValue	Currency	EsgStringValue	ChangeType	EntryDate	EffectiveToDate	ActionType
5000695780	131	31/12/2019	Year	2019	FALSE	DonationsTotal	100000.0	500110	null	N	2021-11-10T05:34:38.38Z	null	I
5001158690	149	31/12/2020	Year	2020	TRUE	DonationsTotal	752000.0	500110	null	N	2021-11-11T15:39:19.19Z	null	I
5001184130	154	30/06/2021	Year	2021	FALSE	DonationsTotal	205000.0	500244	null	N	2021-10-28T13:25:51.51Z	null	I
5001207818	67	30/06/2021	Year	2021	TRUE	DonationsTotal	1502958.0	500117	null	N	2021-10-28T12:30:10.10Z	null	I
5000442152	189	31/12/2020	Year	2020	TRUE	DonationsTotal	0.0	500110	null	N	2021-11-12T14:29:23.23Z	null	I
5000153644	80	30/06/2021	Year	2021	TRUE	DonationsTotal	150680.96	500117	null	N	2021-10-28T12:47:01.01Z	2021-11-04T10:40:32.32Z	I
5000153644	80	30/06/2021	Year	2021	TRUE	DonationsTotal	104000.0	500117	null	R	2021-11-04T10:40:32.32Z	null	I

The currency field is published as Refinitiv PermId which can be converted to ISO, using the currency reference cross reference file.

Values that are decimals and percentages:

OrganizationId	FinancialPeriodId	PeriodEndDate	PeriodType	Year	ItemCode	EsgAnalyticValue	Currency	EffectiveFromDate	EffectiveToDate	Action
4295856795	251	30/06/2021	Year	2021	CompensationCommitteeIndependence	1.0	null	2021-12-05T00:00:00.00Z	null	I
4295856795	251	30/06/2021	Year	2021	ExecutiveMembersGenderDiversityPercent	0.0	null	2021-12-05T00:00:00.00Z	null	I
4295856795	251	30/06/2021	Year	2021	IndependentBoardMembers	0.8571428571428	null	2021-12-05T00:00:00.00Z	null	I
4295856795	251	30/06/2021	Year	2021	NominationCommitteeIndependence	0.75	null	2021-12-05T00:00:00.00Z	null	I

Values marked in the glossary as percentages are not delivered in the PIT files as percentage values, but as ratios.

5 Additional Information

5.1 Feedback

We invite your comments, corrections, and suggestions about this document.

To share your comments, open the **Help & Support** Feedback page on the **MyRefinitiv** website. Your comments can be left there.

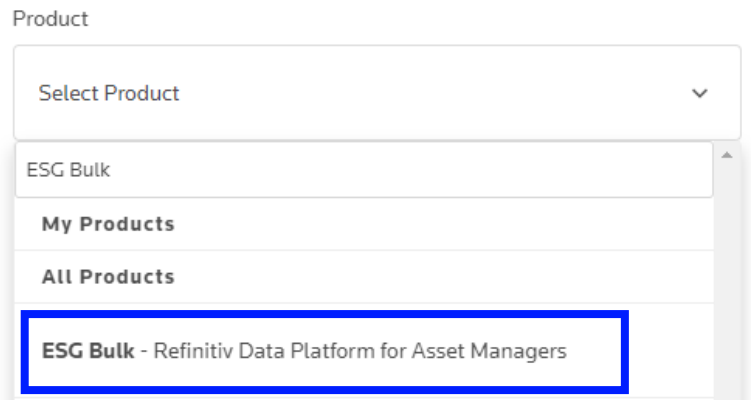
Your feedback helps us continue to improve our user assistance.

5.2.1 Get Support

MyRefinitiv is the Refinitiv portal that provides a single access point for timesaving support services. It also provides billing, user management, and other information services.

For support using RDP, go to the Help & Support page at **MyRefinitiv**. You can raise a query there for any questions.

Choose the product: ESG Bulk – Refinitiv Data Platform for Asset Managers in the drop down list.



5.2.2 Support Channels

Refinitiv also offers support channels that keep clients informed of changes to products and data, as well as offering real-time service alerts.

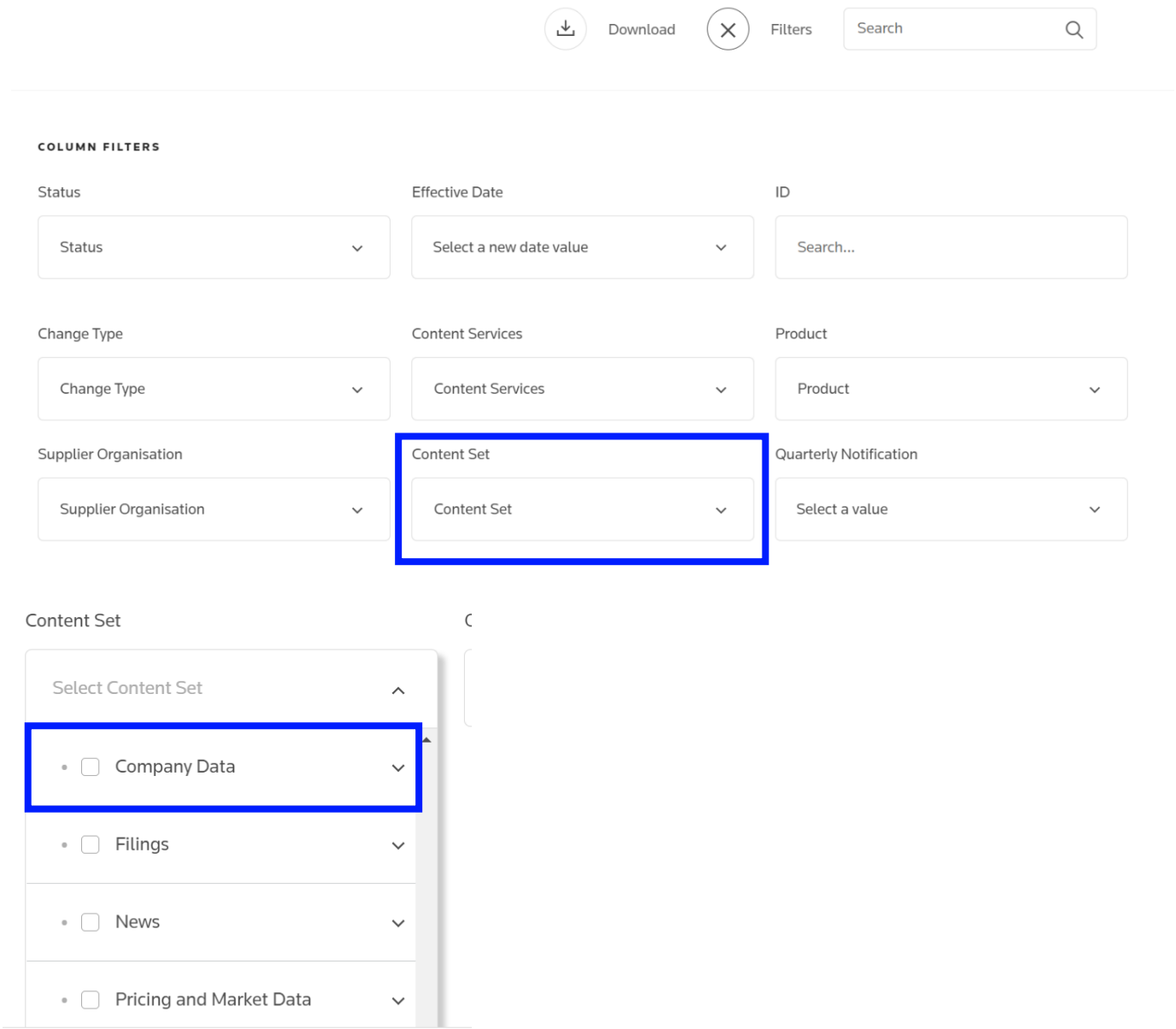
View current changes on the Notifications and Alerts page.

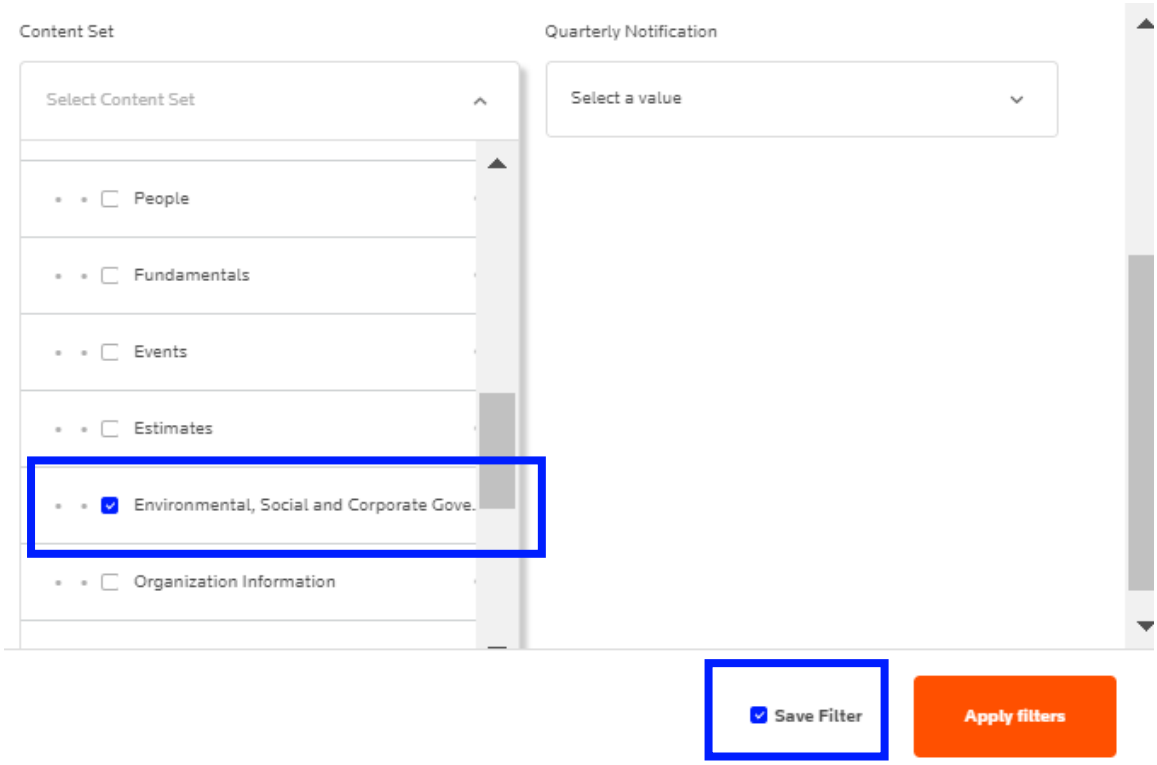
You are encouraged to subscribe to the following support channels:

Change Notifications channels:

ESG Data Notifications

Content notifications of new, enhanced, or changed functionality. These may require your action, in products that you use..
Data Notifications | MyRefinitiv
Choose the Content Set Filter, Select Company data and then Environmental, Social and Corporate Governance

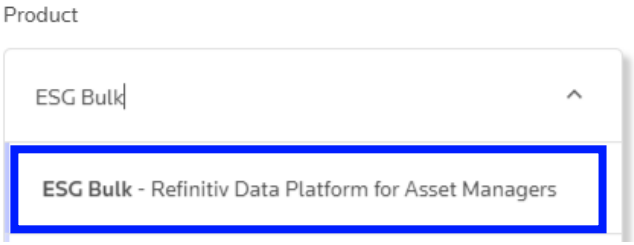




ESG Bulk Product Change Notifications

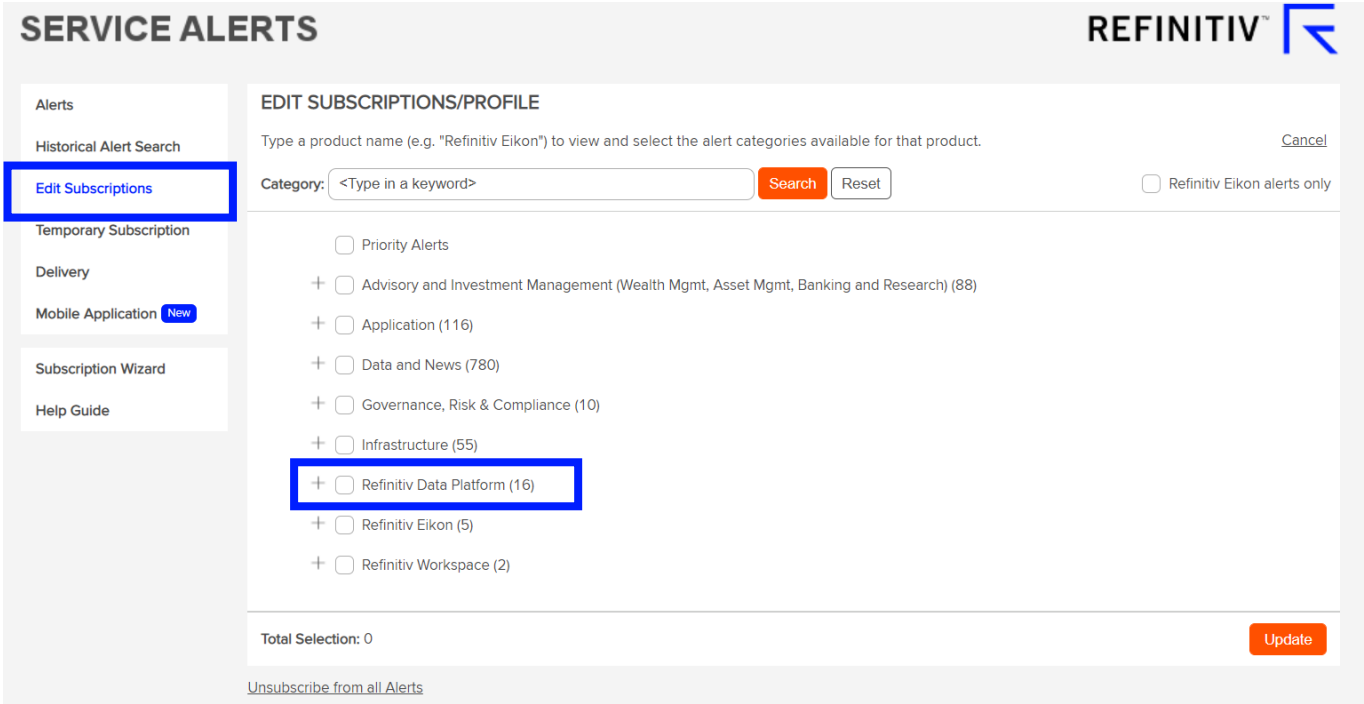
Planned changes to Refinitiv's products.
[Product Change Notification | MyRefinitiv]

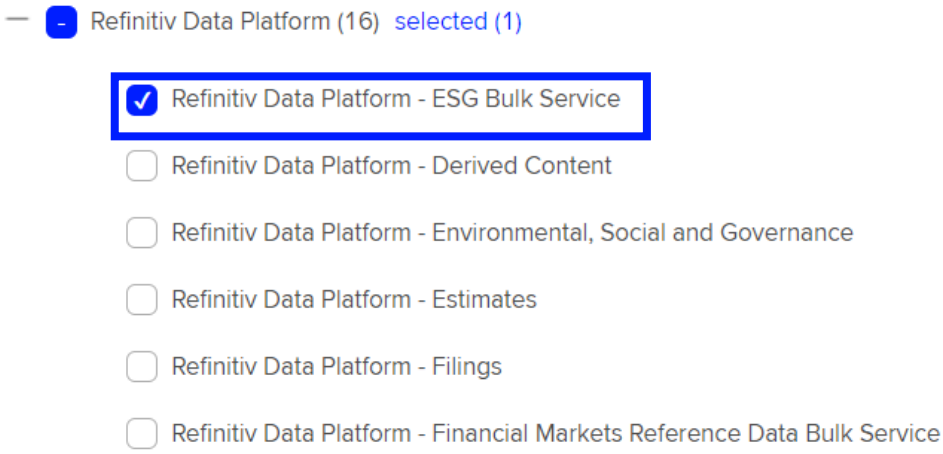
Choose the product: ESG Bulk – Refinitiv Data Platform for Asset Managers



Service Alerts:
Real-time service alerts about planned maintenance and unplanned service issues affecting your products and services. You can be notified via SMS or email. An **Email Subscriptions** section is included on the page. You should subscribe to the Bulk Service support channel here.

See the Subscriptions page.





5.2.3 Your Personal Information

Refinitiv is committed to the responsible handling and protection of personal information.

We invite you to review our Privacy Statement.

This describes how we collect, use, disclose, transfer, and store personal information when needed to provide our services, and for our operational and business purposes.

The Privacy Statement provides information about your rights. Also, how you can contact us if you have questions about how we handle your information.

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Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

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