

FTSE JSE Responsible Investment Index Series - Inclusion Criteria - Ground Rule Update

09 September 2019

FTSE Russell would like to inform clients of the following update to the FTSE JSE Responsible Investment Index Series which is effective from December 2019.

New Rule - updates highlighted in bold

Section 5: Index Qualification Criteria

- 5.1 Constituents of the eligible universe that have a **FTSE ESG Rating of 2.9** or above qualify as constituent members of the FTSE/JSE Responsible Investment Index. The Methodology for determining FTSE ESG Ratings can be accessed using the following link:
[ESG-ratings-overview](#)
- 5.2 Constituents of the FTSE/JSE Responsible Investment Index with an **ESG Rating below 2.4** are at risk of deletion from the FTSE/JSE Responsible Investment Index **from December 2019**. If a constituent still has an **ESG Rating below 2.4** following a 12 month period they will be deleted unless FTSE Russell approves a longer period.

Old Rule

Section 5: Index Qualification Criteria

- 5.1 Constituents of the eligible universe that have a FTSE ESG Rating of 2.5 or above qualify as constituent members of the FTSE/JSE Responsible Investment Index. The Methodology for determining FTSE ESG Ratings can be accessed using the following link:
[ESG-ratings-overview](#)
- 5.2 Constituents of the FTSE/JSE Responsible Investment Index with an ESG Rating below 2.1 are at risk of deletion from the FTSE/JSE Responsible Investment Index from December 2017. If a constituent still has an ESG Rating below 2.1 following a 12 month period they will be deleted unless FTSE Russell approves a longer period.

An updated copy of the FTSE JSE Responsible Investment Index Series Ground Rules (v2.0) is now available using the following link:

FTSE JSE Responsible Investment Index Series Ground Rules [FTSE_JSE_Responsible_Investment_Index](#)

Or on the FTSE Russell website: www.ftserussell.com

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