

## *Celebrating 20 Years of Innovation in Socially Responsible Investing*

### Overview

#### Universe

Largest 3000 US publicly traded companies by market capitalization

#### Accessibility

Web-based database

#### Update Frequency

Daily updates by analysts  
Publishing twice monthly

#### Download Format

Company profiles in PDF  
Data exports to MS Excel

### Learn More

To learn more or to schedule a demo, please contact KLD Sales at (617) 426-5270 or [sales@kld.com](mailto:sales@kld.com)

### About SOCRATES

SOCRATES is a web-based database of quality research and analysis on the environmental, social and governance (ESG) performance of companies worldwide.

With SOCRATES, clients can:

- Review individual company performance
- Screen portfolios for ESG performance and controversial business involvement
- Create buy lists and restricted lists for portfolio screening and benchmarks
- Query the database for key words or phrases
- Monitor shareholder resolutions and company responses

### Coverage

KLD evaluates corporations for environmental, social, and governance performance on more than 280 data points using a proprietary ratings system.

SOCRATES covers the following issues:

<b>Environment</b>	<b>Social</b>	<b>Governance</b>
Alternative Energy	Community Relations	Accounting
Climate Change	Diversity	Compensation
Liabilities	Employee Relations	Ownership
Management Systems	Human Rights	Political Accountability
Regulatory Problems	Product	Transparency
<b>Controversial Business Issues</b>		
Abortion	Contraceptives	Military
Adult Entertainment	Firearms	Nuclear Power
Alcohol	Gambling	Tobacco

### About KLD Research & Analytics, Inc.

KLD Research & Analytics, Inc. is the leading authority on social research and indexes for institutional investors.

Since 1988, institutional investors, managers, trustees, consultants, and advisors have depended on KLD's quality and expertise.

Today more than 400 clients worldwide use KLD products and services to integrate environmental, social and governance (ESG) and faith-based criteria into their investment decisions.