



Morningstar to Offer European ESG Template (EET)

In response to EU Action Plan ESG Regulations, Morningstar Sustainalytics offers the industry standard European ESG Template (EET), a tool designed to enable the efficient exchange of ESG data between product manufacturers and distributors to fulfill regulatory requirements under the Sustainable Finance Disclosure Regulation (SFDR), EU Taxonomy Regulation, and the relevant delegated acts complementing Markets in Financial Instruments Directive (MiFiD) II and Insurance Distribution Directive (IDD).

Gaining Support from the Industry

It is our view that the EET represents an excellent industry initiative to facilitate EU disclosures, and joined the working sub-groups convened by FinDatEx to help shape the disclosure requirements of the EET.

The industry is looking to the EET for the content to support them in fund selection to comply with upcoming regulations and assist them in communicating their value and transparency to investors.

Morningstar is here to help by doing the heavy lifting to collect, validate, normalise, and enable EET datasets across our suite of products to meet your workflow needs.

We have developed a range of solutions to support our clients with creating and using the template. These solutions pertain to template creation, access to ESG disclosures, as well as European ESG template company data and mapping, which supports fund managers by providing the relevant company level data that asset managers can ingest, aggregate, and insert into the template.

We provide market-leading coverage of EET data of over **143,000** applicable mutual fund share classes. Sustainalytics covers approximately 13,000 issuers on EET company data and mapping.

Solutions

- ▶ Our EET data set includes a repository of 580 fields with both reference data and analytics on Mutual Funds (further contextualized with our proprietary research, ratings, and analytics).
- ▶ Templates for product manufacturers that include Morningstar fund level data calculations.
- ▶ EET dataset access and analysis for positioning ESG products.
- ▶ Data aggregation and report creation for regulatory reporting.
- ▶ EET company data and mapping for product manufacturers planning to aggregate and fill out the template themselves.
- ▶ EET disclosures for distributors looking to access European ESG data disclosed by manufacturers, collected across entire Morningstar fund database.
- ▶ Asset Managers looking for an EET creation solution can make use of Morningstar's Publishing System and our pre-calculated ESG data on Principal Adverse Impact on their Fund range for seamless analytics creation and file creation service.
- ▶ Morningstar Direct enables you to access EET datasets to perform analysis and confirm fit with your customer's ESG profile, helping you make recommendations through Presentation Studio for report creation.

Learn More

Visit:

[EU Sustainable Finance Action Plan Resources](#)

Contact us:

EMEA@morningstar.com