



---

# Frequently Asked Questions

# Frequently asked questions

## Investment profile

### **What is a company's investment profile on the Bloomberg Terminal?**

The investment profile is a comprehensive company financial performance report card that is displayed on the Bloomberg Terminal. Investors use this data to track a company's performance in order to make the right investment and risk decisions.

### **Why do companies choose to share this information on the Bloomberg Terminal?**

The GEI data is collected for the purpose of adding to your company's investment profile on the Bloomberg Terminal, which is accessed by more than 320,000 investment professionals worldwide. Public companies now have a way to showcase their gender equality efforts across multiple dimensions directly to investors.

### **How do investors use gender-equality data?**

There is an increasing trend towards investors using environmental, social and governance (ESG) data as part of their investment and risk analysis. By disclosing data related to your policies and practices, the Bloomberg Terminal connects your company with investors screening for socially driven investment strategies and directing capital to companies committed to gender equality.

### **How do I add additional gender data to my company's investment profile on the Terminal?**

If you choose to submit supplemental gender data, send your data to [GEI@Bloomberg.net](mailto:GEI@Bloomberg.net). The deadline to submit is August 15, 2019.

### **How do I share my data?**

Contact [GEI@Bloomberg.net](mailto:GEI@Bloomberg.net) to request your company-specific data worksheet. Since you may not be familiar with your company's investment profile, we will send you a prepopulated data worksheet with the gender data that investors are already able to see. You may request a worksheet purely for reference or to familiarize yourself with the framework.

### **Does my company have to answer all the questions?**

No, companies do not need to answer every question. We will add any data submitted to your company's investment profile.

### **What time period should the data submitted reflect?**

We are currently collecting data for your company's 2018 fiscal year. The collection period runs from May 1 to August 15, 2019.

### **What are the scope of coverage requirements?**

All data, unless otherwise noted, must reflect at least 80% of your company's global employee population, including subsidiaries.

### **If my company doesn't have a specific policy, should I still answer the question?**

Yes. Many investors look for a high level of disclosure as an indicator of a company's commitment to gender equality. The policies included in the framework reflect best practices that promote equity in the workplace, but many companies do not have all policies across all markets.

### **Can I talk to someone on the Bloomberg GEI team before submitting my data?**

Yes, absolutely! Please email [GEI@Bloomberg.net](mailto:GEI@Bloomberg.net) if you have questions or feedback. We are happy to schedule a call to discuss your company and any specific questions you have.

# Frequently asked questions

## Index inclusion

### **What is the Bloomberg Gender-Equality Index, and how are companies selected?**

The Bloomberg Gender-Equality Index tracks the financial performance of those public companies most committed to gender equity. There is a plethora of research that demonstrates the positive financial impact that diversity has on an organization's bottom line. Index inclusion is determined by evaluating the fiscal year gender data that is available on a company's investment profile on the Bloomberg Terminal. Those companies that score above a globally established threshold, based on disclosure and best-in-class components, are included in the annual index.

### **How did Bloomberg create the GEI framework?**

The GEI framework was created in partnership with industry-recognized third-party experts from around the world.

### **What companies are eligible to be included in the Index?**

While all public companies may submit supplemental gender data for their company's investment profile, at this time only companies with a market capitalization over USD 1 billion are eligible for index inclusion. Companies across all industries and geographies are eligible. The 2019 Gender-Equality Index includes companies headquartered across 36 countries and regions.

### **Are companies in the Index ranked?**

No. The Index is weighted by market capitalization.

### **Will my company's data be available online?**

Company data is only available on its investment profile on the Bloomberg Terminal, but the full list of companies included in the Index is available on our website [Bloomberg.com/GEI](https://www.bloomberg.com/GEI).

### **What data is used to determine whether a company is included in the Index?**

The gender data on a company's investment profile is used to score companies for index inclusion. Bloomberg data comes directly from companies in the form of public filings and publications.

Given the limited gender data disclosed in public filings, companies have the opportunity to provide supplemental data directly through Bloomberg's gender reporting framework and have it displayed on their company profile.

### **Is Bloomberg transparent with companies on how their score was determined?**

Yes. Any company that submits data through Bloomberg's gender reporting framework will receive a detailed scoring template outlining how each question was scored so they can benchmark internally and/or against peers. In addition to a company's individual score, we provide the mean and median scores for its industry and the full Index.

### **When will companies be notified of 2020 Index inclusion?**

Companies will be notified during the fourth quarter of 2019.

### **Is there any cost associated with inclusion in the GEI?**

No. There is no cost associated with inclusion in the GEI or adding supplemental data to a company's investment profile. Inclusion is based on a globally established threshold score including disclosure and best-in-class components.

### **How do companies promote their inclusion in Bloomberg's Gender-Equality Index?**

Bloomberg works with all Index companies' communications and marketing teams throughout the year to promote their laudable commitment to gender equality and transparency. Companies that are included in the Index will receive a media kit with a press release template and the GEI seal which can be used in CSR reports and other promotional materials. For more information on co-promotional opportunities, please reach out to [GEI@Bloomberg.net](mailto:GEI@Bloomberg.net).