

SOLUTION OVERVIEW

FTSE MarketPsych Thematic Index Series

The next generation of thematic investing



Overview

The FTSE MarketPsych Thematic Index Series measures the performance of companies with defined exposure to long-term structural investment themes. It uses reported revenue and forward-looking signals to assess each company's exposure today and how it is developing.

Developed in partnership with MarketPsych, the series combines FTSE Russell's rules-based index expertise with AI-powered thematic intelligence. Every constituent has a documented assessment explaining its relevance to the theme.

Five structural trends

Themes sit within five long-term structural trends:

- Technology & Innovation
- Society & Demographics
- Geopolitical Realignment
- Natural Resources & Infrastructure
- Health & Wellbeing.

FTSE Russell's Theme Taxonomy defines which activities are in scope and which are excluded. Sub-themes cover distinct activities and parts of the value chain. Each company's products and services are mapped to the relevant sub-themes.

Key features



Calibrated exposure

Pure, Core and Ecosystem offer different levels of thematic exposure, from focused pure play to broader coverage of the value chain.



Built to evolve

The weighting of revenue and forward-looking signals reflects the theme's maturity, with greater emphasis on forward-looking evidence for emerging themes and reported revenue for mature themes.



Clear rationale

Documented evidence explains why each constituent is relevant to the theme, supported by expert oversight.



FTSE Russell foundations

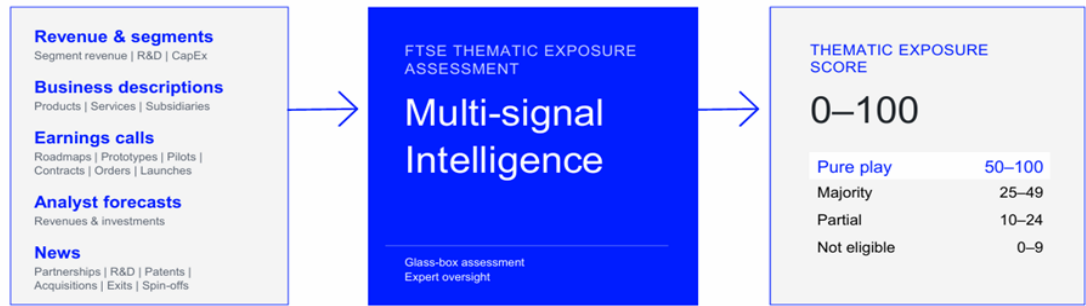
Built on the FTSE Global Equity Index Series and Russell US universe, the series brings FTSE Russell's established index foundations to thematic investing.

How multi-signal intelligence works

The FTSE Thematic Exposure Assessment uses LSEG and other FTSE Russell-approved data to assess each company against a defined theme. Revenue exposure and forward-looking exposure are assessed separately.

How companies are selected: forward-looking and explainable

Every company is scored 0–100 on multi-signal evidence, with the reasoning documented at each step.



Revenue exposure

The assessment maps products and services to the business segments in which their revenue is reported. Fixed rules then calculate the share of company revenue attributable to the theme.

Forward-looking exposure

The assessment examines how central the theme is to the company’s business and the evidence of how that exposure is developing. Named programmes, product launches, contracts, pilots and roadmaps help identify activity that may not yet be reflected in reported revenue.

Fixed rules combine the two assessments into a **Thematic Exposure Score from 0 to 100**. The score determines the company’s purity tier and supports index eligibility.

How theme maturity affects the assessment

Each theme is classified as Emerging, Scaling or Mature. Its maturity determines the balance between revenue evidence and forward-looking signals, with both retained at each stage.

Emerging	Scaling	Mature
Greater emphasis on forward-looking signals where thematic revenues may still be developing.	A balance of reported revenue and forward-looking signals as commercial activity expands.	Greater emphasis on reported revenue as thematic businesses become established.

Three ways to access a theme

Pure, Core and Ecosystem use the same assessment framework. The company purity tiers determine the exposure available through each variant.

Index variant	Company purity tiers	Exposure
Pure	Pure Play	Focuses on companies with the highest thematic exposure.
Core	Pure Play and Majority	Adds companies where the theme is one of several material business activities.
Ecosystem	Pure Play, Majority and Partial	Adds companies with Partial exposure for broader coverage of the thematic value chain.

About FTSE Russell

FTSE Russell is a leading global provider of index and benchmark solutions, spanning diverse asset classes and investment objectives. As a trusted investment partner we help investors make better-informed investment decisions, manage risk, and seize opportunities.

Market participants look to us for our expertise in developing and managing global index solutions across asset classes. Asset owners, asset managers, ETF providers and investment banks choose FTSE Russell solutions to benchmark their investment performance and create investment funds, ETFs, structured products, and index-based derivatives. Our clients use our solutions for asset allocation, investment strategy analysis and risk management, and value us for our robust governance process and operational integrity.

For over 35 years we have been at the forefront of driving change for the investor, always innovating to shape the next generation of benchmarks and investment solutions that open up new opportunities for the global investment community.

Contact us

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