

## Ashburton Investments selects FTSE Russell as primary index provider

- Ashburton Investments' international business selected FTSE Russell as its primary provider of Equity and Fixed Income indexes, data and analytics
- Ashburton Investments successfully moved £1.5 billion to track FTSE Russell equity and fixed income benchmarks
- Ashburton Investments now use FTSE Russell's leading ESG Ratings and Industry Classification (ICB) data

FTSE Russell, the global index, data and analytics provider, has been selected by Ashburton Investments' international business as the active investment manager's primary provider of equity and fixed income indexes. The agreement, signed in March 2020, was later followed by the successful transition of £1.5 billion in assets under management to FTSE Russell indexes in July and August 2020.

Ashburton Investments now also use FTSE Russell's market leading data solutions, including the Industry Classification Benchmark (ICB).

As a new client, Ashburton Investments transitioned investment to major FTSE Russell indexes such as the FTSE All-World and FTSE All-World High Yield Dividend Indexes and fixed income indexes such as the FTSE WorldBIG Index. Ashburton Investments now also utilise FTSE Russell's range of indexes as the underlying benchmark for their international equity and fixed income funds, to inform asset allocation and to report performance to investors.

Ashburton Investments also utilise FTSE Russell's ESG Ratings services, which measure environmental, social, and governance risk and performance on 7,200 securities across almost 50 developed and emerging markets. In addition, the asset manager has licensed FTSE Russell's Industry Classification Benchmark (ICB), a globally used standard for the classification of companies by industry and sector.

**Dan Berry, Head of Sales and Analytics, FTSE Russell said:** "We are delighted to have been selected by Ashburton Investments' international business as their primary index provider this year and to support the asset manager's successful migration to FTSE Russell indexes. The agreement reflects FTSE Russell's market leading multi-asset and data capabilities working in partnership to meet the needs of our customers."

**Corne Burger, Head: International, Ashburton Investments said:** "FTSE Russell offer us the global indexing and data capabilities we need to run a range of funds and segregated mandates for institutional and private clients through a single provider. These products will inform investment decisions and market research, while also supporting reporting on fund performance. FTSE Russell's robust and transparent governance framework is also important for us."



– Ends –

## For further information:

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## Notes to editors:

### About FTSE Russell:

FTSE Russell is a global index leader that provides innovative benchmarking, analytics and data solutions for investors worldwide. FTSE Russell calculates thousands of indexes that measure and benchmark markets and asset classes in more than 70 countries, covering 98% of the investable market globally.

FTSE Russell index expertise and products are used extensively by institutional and retail investors globally. Approximately \$15 trillion is currently benchmarked to FTSE Russell indexes. For over 30 years, leading asset owners, asset managers, ETF providers and investment banks have chosen FTSE Russell indexes to benchmark their investment performance and create ETFs, structured products and index-based derivatives.

A core set of universal principles guides FTSE Russell index design and management: a transparent rules-based methodology is informed by independent committees of leading market participants. FTSE Russell is focused on applying the highest industry standards in index design and governance and embraces the IOSCO Principles. FTSE Russell is also focused on index innovation and customer partnerships as it seeks to enhance the breadth, depth and reach of its offering.

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