

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



17 Asset Management & Syntax Announce The Launch of the 17AM-SDG 9 US Infrastructure & Innovation Index on SMArtX

May 2024



17
Asset
Management

17 Asset Management & Syntax Announce The Launch of the 17AM-SDG 9 US Infrastructure & Innovation Index on SMArtX

17 Asset Management (“17 AM”) and Syntax Data (“Syntax”) are pleased to announce the launch of the 17AM-SDG 9 US Infrastructure & Innovation Index, designed to capture investment opportunities aligned with the 9th United Nations (“UN”) Sustainable Development Goal (“SDG”).

This thematic equity Index provides investors with access to a curated selection of publicly traded companies poised to drive the modernization of infrastructure within the United States. Utilizing a rules-based methodology that incorporates qualitative ESG and SDG screens, the 17AM-SDG 9 US Infrastructure & Innovation Index has a selection of approximately 115 companies (subject to periodic rebalancing) that derive over 50% of revenues from activities and operations that are aligned with UN SDG 9, which aims to build resilient infrastructure, promote sustainable industrialization, and foster innovation.

Many of the companies in this Index are experiencing strong tailwinds propelled by historic capital allocation due to the growing societal imperative to repair aging infrastructure and shift industry into the age of AI. This Index provides diversified, transparent, and efficient exposure to a long-term trend by identifying leading SDG 9-aligned companies traded in the US that are leveraging rapid innovation, new regulations, and increased government spending.

The need to modernize physical and digital infrastructure, including tunnels, bridges, roads, cities, transport hubs, telecommunication towers, industrial centers, data centers, and many more, will remain a priority for the next decade regardless of economic conditions. SDG 9 calls for a new approach to infrastructure and industrialization that is more sustainable, inclusive, and equitable. As we embark on a new era of transformation, the companies in this Index will play a critical role in delivering impactful outcomes for generations to come.

Patrick Shaddow, President and CEO of Syntax, said, “The 17AM-SDG 9 US Infrastructure & Innovation Index provides investors with pure play exposure to US infrastructure and innovation companies with a quality screen overlay. This Index leverages both Syntax’s differentiated systems-level data and 17 Asset Management’s intentional portfolio methodology. This portfolio is the first of a series of SDG portfolios designed to provide transparency and accountability previously lacking in the ESG and impact investing space.”



John Morris, Founder and CEO of 17 Asset Management, commented, “We believe this Index provides a good precedent for a higher level of rigor that is needed when combining investment and social outcomes. We have leveraged both ESG data as well as SDG targets and indicators in addition to our assessment of overall company financial factors. We ask, why would you not want this level of information incorporated into investment decisions? The higher quality of data we receive from Syntax allows us to create higher quality investments for our clients.”

Syntax and 17 AM plan to launch additional SDG indices in July and throughout the remainder of the year, with an Index for each of the 17 anticipated SDGs. These Strategies are designed as direct investments for wealth managers to use with their clients and can also be used as benchmarks for individual portfolios. Additionally, they can serve as an ingredient for other asset managers in creating an efficient approach to gaining infrastructure investment exposure and aligning with SDG 9.

The SDG Goals Agenda 2030 was announced in September 2015 in Ethiopia and ratified by 193 countries as a mechanism for partnering with private capital to achieve their goals by 2030.

Advisory firms and asset managers can access the 17AM-SDG 9 US Infrastructure & Innovation Index through the SMArtX model marketplace.

Contact

Sarah Grieco
Syntax Data
sgrieco@syntaxdata.com

John Morris
17 Asset Management
jmorris@17assetmanagement.com

About Syntax

Syntax LLC is a financial data and technology company that codifies business models into a relational system we call Affinity Data™. Syntax operates through three segments: Affinity Data™, Syntax Direct™, and Syntax Indices™. Using its patented FIS® technology inspired by systems sciences, the Affinity Data™ segment offers the most comprehensive, granular, and accurate product line revenue data available on the market. The Syntax Direct™ segment then uses this abundance of data to facilitate the near instantaneous creation and ongoing management of boundless direct indexing solutions and rules-based equity portfolios through a fully automated platform. The Syntax Indices™ segment offers customized and proprietary indices, including core global benchmarks and micro- and macro-thematic, smart beta, defined outcome, and target volatility indices. These indices are foundational for a range of financial products, such as ETFs, UITs, and structured products. Learn more at www.syntaxdata.com

