

November 19, 2025

Index Name Change Notice

Morningstar Indexes will update the GR return variant names of the US equity indexes listed [here](#), replacing GR with TR to align with standard naming conventions. While the TR (Total Return) and GR (Gross Return) designations are used interchangeably and both denote total returns (inclusive of capital gains and distributions) before taxes, Morningstar Indexes uses the TR convention for U.S.-focused indexes and GR for those that include non-U.S. securities. These changes will take effect on December 22, 2025.

As a result, the return variant names of the indexes will be updated within the index files. There will be no impact on the file names.

About Morningstar Indexes

Morningstar Indexes was built to keep up with the evolving needs of investors—and to be a leading-edge advocate for them. Our rich heritage as a transparent, investor-focused leader in data and research uniquely equips us to support individuals, institutions, wealth managers and advisors in navigating investment opportunities across major asset classes, styles, and strategies. From traditional benchmarks and unique IP-driven indexes to index design, calculation and distribution services, our solutions span an investment landscape as diverse as investors themselves.

Contact Us

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