MORNINGSTAR Indexes

November 13, 2026

1 Week Reminder: Index Name Change Notice

Morningstar Indexes will rename the indexes listed below effective November 20, 2026. The new names are intended to distinguish the existing indexes from a planned future suite of Morningstar Market Sector Indexes that will use sectors and industries defined by the Morningstar Global Equity Classification Structure (GECS).

The index names will be updated for all calculated index variants, including total return, price return, and SOQ. Clients are highly encouraged to review their data parsers and ensure they can ingest the updated index names. A complete list of the current and updated index names can be found here.

Current Index Name	**Updated Index Name**
Morningstar US Core Cap Consumer Cyclical	Morningstar US Core Cap Consumer Cyclical Classic
Morningstar US Core Cap Consumer Defensive	Morningstar US Core Cap Consumer Defensive Classic
Morningstar US Core Cap Energy	Morningstar US Core Cap Energy Classic
Morningstar US Core Cap Financial Services	Morningstar US Core Cap Financial Services Classic
Morningstar US Core Cap Healthcare	Morningstar US Core Cap Healthcare Classic
Morningstar US Core Cap Industrials	Morningstar US Core Cap Industrials Classic
Morningstar US Core Cap Basic Materials	Morningstar US Core Cap Basic Materials Classic
Morningstar US Core Cap Communication Services	Morningstar US Core Cap Communication Services Classic
Morningstar US Core Cap Real Estate	Morningstar US Core Cap Real Estate Classic
Morningstar US Core Cap Technology	Morningstar US Core Cap Technology Classic

Morningstar US Core Cap Utilities	Morningstar US Core Cap Utilities Classic

There are no changes to the methodology, file format, file names, or delivery location associated with this update. As announced on September 2, Index Codes will be updated effective January 2027. These index name changes do not alter or impact the previously communicated identifier update.

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. In February 2026, the acquisition of CRSP brought the CRSP Market Indexes—benchmarks for over $3 trillion in AUM —into the Morningstar Indexes family. Additionally, CRSP's Research Data Products, renowned for their academic rigor, historical depth and accuracy, will further enhance Morningstar's equity research and data capabilities. This integration unites two trusted sources of market insight, reinforcing a shared commitment to transparency, quality, and investor-focused solutions.

Please visit indexes.morningstar.com for more information.

Contact Us

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