

Morningstar Indexes

June 13, 2024

15-Day Notice: Consolidation of Morningstar Equity Indexes Calculation to Cirrus (Helix)

Dear Clients,

As [previously announced](#), Morningstar Indexes will consolidate the calculation and publication of Morningstar Equity Indexes to a single in-house platform, Cirrus (project name: "Helix I"). Morningstar Indexes plans to migrate equity indexes not currently on Cirrus onto the platform **after the close of business on June 28, 2024**. This is your fifteen (15) day notice.

The parallel test files have been available to you since early March, and we strongly encourage clients to begin reviewing these files. There are changes to the file names, file formats, and file content. An overview of the changes and the program FAQ can be found [here](#).

We are committed to minimizing disruption to clients and the Morningstar Indexes Implementation team is here to support you through the migration. A member of the team will have already contacted you regarding your firm's specific impact. Please contact CirrusMigration@morningstar.com if you have immediate questions about how these changes will impact you or to schedule a call to find out more.

When is this happening?

Timeframe	Activity
June 14, 2024	June 2024 index reconstitution pro forma period begins. There will be a change in reference date and five days of pro forma. Clients will receive live _PRO files delivered in the production /data folder during the pro forma period to inform of any index changes. The Morningstar Cirrus _PCON files will also be delivered in parallel for testing in the /Test directory.
June 24, 2024	June 2024 index reconstitution will go live. Clients will receive production data in existing file formats in the /data directory. Morningstar Cirrus files will continue to be delivered in parallel for testing.
June 25, 2024	Last delivery of Cirrus test files to /Test directory.
June 28, 2024	Last delivery of Morningstar Amber file formats to /data directory.
July 1, 2024	Morningstar Cirrus file formats are the live, ongoing file format in the /data folder. Amber files will be discontinued for the impacted indexes.

About Morningstar Indexes

Morningstar Indexes has been designing modern solutions for 20 years, but what makes us truly unique has been more than three decades in development. Our rich history began in 1984, when Morningstar was founded on a

promise to empower investors with data and research that is independent and objective. Over time, our collection of data has expanded considerably—and so has its application. Today, Morningstar Indexes draws on unique IP to unlock an extensive range of emerging opportunities for investors of every kind, while providing a robust institutional beta platform for core investing.

Contact Us

MorningstarIndexesAlerts@morningstar.com is a no-reply email address. For questions concerning this notification, please contact us at Indexes@morningstar.com.



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