



# Morningstar Gender Diversity Indexes: GenDi and GenDi J Frequently Asked Questions

April 2023

---

## General

### What is the purpose of the indexes?

The Morningstar Gender Diversity Indexes are designed to reflect the shares of publicly traded companies within the respective investable universe that are committed to gender equality.

The indexes aim to provide a risk/return profile similar to the broad market and are powered by company-specific analysis provided by Equileap, a leading researcher focused on gender.

Leveraging the Equileap Gender Equality Scorecard™, the Morningstar® Gender Diversity Indexes employ 19 gender equality criteria across four broad categories: gender balance in leadership and workforce; equal compensation and work/life balance; policies promoting gender equality; and commitment to transparency and accountability.

### About Equileap

[Equileap](#) is the leading provider of data and insights on gender equality in the corporate sector. Equileap researches several thousand public companies globally using its comprehensive Gender Equality Scorecard™ with 19 criteria, including gender balance across the workforce, the gender pay gap, paid parental leave and anti-sexual-harassment policies. Its data is used by dozens of financial institutions globally.

---

## Index Methodology and Maintenance

### How are the indexes constructed?

Please refer to the below index methodology for information about index construction.

The Morningstar Developed Markets ex-Japan Gender Diversity Index (GenDi) [index methodology](#)

The Morningstar Japan ex-REIT Gender Diversity Tilt Index (GenDi J) [index methodology](#)

### What is the rebalance schedule?

The indexes are reconstituted (membership reset) in December, using Equileap’s annual Gender Equality scoring. The indexes are rebalanced (weights reset) quarterly, in March, June, September, and December.

### What are the inception dates?

The inception dates of the indexes are in the table below.

Index	Inception date	Performance Start date
GenDi	Aug. 10, 2020	Dec. 19, 2014
GenDi J	MarchFe,27,2023	Dec, 18,2015

**Which companies are included in the indexes?**

A full list of index constituents is available for each of the indexes.

GenDi: [Holding link](#)

GenDi J: [Holding Link](#)

**My company is included in the index. How can I understand my company’s Equileap Gender Equality score?**

The [Equileap Gender Equality Scorecard](#) includes 19 criteria points across four categories: gender balance in leadership and workforce; equal compensation and work/life balance; policies promoting gender equality; and commitment to transparency and accountability. Examples of the 19 criteria driving category scoring include the gender balance of senior management, the gender pay gap, and policies around parental leave and sexual harassment. Please refer to the Gender Equality Scorecard to learn more about each of the criteria. If you would like to know your company’s Gender Equality score, please reach out to [indexes@morningstar.com](mailto:indexes@morningstar.com), where members of our team can help you with your request.

**What is the criteria for improving my company’s Gender Equality score in the index?**

Morningstar uses the four categories of the Gender Equality Scorecard as screening criteria to award companies a score on a 1-5 scale based on their commitment to equality in the workplace. Please refer to [Equileap’s Gender Equality Scorecard](#) to learn more

about the criteria points involved in the creation of a company’s score. You can also reach out to [indexes@morningstar.com](mailto:indexes@morningstar.com), where members of our team can help you with your request.

**My company is a part of this index; how can my company promote this?**

A logo is available for the top constituents residing in Group 1 of the index. If your company is interested in using the logo for marketing purposes, please reach out to [indexes@morningstar.com](mailto:indexes@morningstar.com).

**My company is not part of this index; how does my company become eligible for inclusion in the index?**

Only securities in the parent indexes are eligible for inclusion in the indexes. From this eligible universe, securities are excluded from the index if they are part of Equileap’s Alarm Bell list, which flags companies embroiled in legal cases involving gender-based violence or discrimination. Please refer to the ‘Appendix’ section in the methodology book on the Morningstar Indexes website to learn more about the Alarm Bell controversy list.

Index name	Parent indexes
GenDi	Morningstar Developed Markets ex-Japan Large Mid Index
GenDi J	Morningstar Japan ex-REIT

### **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.

[www.indexes.morningstar.com](http://www.indexes.morningstar.com)

### **Contact Us**

[indexes@morningstar.com](mailto:indexes@morningstar.com)