

Morningstar Indexes

May 22, 2024

Reminder: MSTARC Retirement Announcement

Dear Clients,

[As previously announced](#), effective **July 1, 2024**, the distribution of Morningstar Indexes via the Cboe Global Indices MSTARC channel will be consolidated into the MSTAR channel. This will provide a more streamlined experience for clients as all real-time indexes calculated by Morningstar Indexes will be available via a single channel. A complete list of impacted indexes can be found [here](#).

Important Dates:

- **April 1, 2024:** Morningstar Indexes will cease onboarding new indexes to the MSTARC Channel. Any new launches will be onboarded to and disseminated by the MSTAR Channel.
- **June 1, 2024:** To ensure a smooth transition, we encourage all clients to subscribe to the Cboe Global Indices MSTAR Channel by this date.
- **July 1, 2024:** MSTARC index distribution will no longer be available via the MSTARC Channel. All index distribution will be moved to the MSTAR Channel.

1. UPDATED - Will the indexes currently on the MSTARC Channel be available on the MSTAR Channel before the June 28, 2024 cutover?

Yes, Morningstar Indexes will be available on both the MSTAR and MSTARC channels beginning May 27, 2024. Clients are encouraged to use the parallel dissemination to store the daily ticks for the MSTARC Indexes for 30 days prior to the cutover.

2. UPDATED - Will Morningstar Indexes populate the Agent Classification field in the Index Definition field?

Yes, Morningstar Indexes will use the Agent Classification field to denote the Morningstar Indexes (MS) and Morningstar Customer (MC) Indexes. The Agent Classification field will be available at the end of June.

3. What does this mean for clients receiving index data via the MSTARC Channel?

If you currently receive data through a third-party data provider and are licensed for the MSTAR Channel, no action is required. You will receive all the tickers currently in the MSTARC channel via the MSTAR Channel starting July 1, 2024.

If you currently receive data through a third-party data provider and are *not* licensed for the MSTAR Channel, please work directly with your provider to be enabled for the MSTAR Channel.

If you require uncontrolled distribution of current MSTARC indexes, please see #3 below.

4. Will this migration impact the current, index dissemination frequency?

No, all indexes included in this migration will maintain the current dissemination frequency on the MSTAR Channel. There are no changes to symbols, calculations or dissemination frequency as part of this migration.

5. How to access the MSTAR Channel via the Cboe Global Indices Feed?

If you require uncontrolled distribution of real-time Morningstar indexes data,

- For clients new to the Cboe Global Indices Feed, please refer the [Cboe Market Data Services Onboarding Portal](#). You can also reach out to your real-time index data provider for more information.
- To add the new channels to an existing Cboe data agreement, please access the “Member Tools” section of the [Cboe Customer Web Portal](#) and submit a “Market Data Applications” request.

6. Who to contact with questions?

For questions regarding the Morningstar Indexes migration, please contact indexes@morningstar.com

For questions regarding licensing the MSTAR channels via the Cboe Global Indices Feed, please contact indexdata@cboe.com

For questions regarding technical support of the MSTAR channels via the Cboe Global Indices Feed, please contact indexsupport@cboe.com

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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