



June 16, 2025

Morningstar Equity Index Statistics (IDXSTAT) History Notification

Morningstar Indexes has extended the history for the Morningstar Equity Index Statistics (IDXSTAT) files back to June 2008, where available. These files offer monthly index portfolio-level statistics, including valuation ratios, growth rates, and other key characteristics, designed to be representative from the perspective of an investor replicating the index. This data can provide insights into how active portfolios are positioned against their benchmarks and how various market segments are evolving. Index statistics are calculated if the underlying data is available for at least two-thirds of the portfolio.

Data Points Included:

Valuation Ratios	Growth Rates	Other
Price/Book Value	Book Value Growth (YoY)	Average Market Cap
Price/Cash Flow	Cash Flow Growth (YoY)	ROE
Price/Earnings (TTM)	Earnings Growth (YoY)	
Dividend Yield (TTM)	Sales Growth (YoY)	
Dividend Yield (Forward)	Dividend Growth (YoY)	
Buyback Yield (TTM)		

The following documents provide further information.

- [Methodology](#)
- [FAQ](#)
- [IDXSTAT File Specs](#)

Please contact the Morningstar Indexes Implementation Team (MorningstarIndexesImplementation@morningstar.com) to learn more and/or to initiate file delivery.

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

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