

Morningstar Indexes

October 9, 2024

Announcement: Impact to Morningstar Medalist Fund Indexes from an Enhancement to the Morningstar Medalist Rating

Starting October 29, 2024, Morningstar will [enhance](#) the Morningstar Medalist Rating™ methodology for improved investment insights. The rating enhancement will introduce a more precise assessment of how much value a managed investment can add before fees compared to its assigned benchmark. Morningstar expects the updated methodology to change the ratings for about 20% of Medalist-rated investment vehicles, most of which will be downgrades that result from a reduced Alpha Potential Estimate.

The Morningstar Medalist Fund Indexes use the Morningstar Medalist Rating to provide exposure to best-in-class rated funds. While there are no changes to the index methodology as a result of the enhancement to the Morningstar Medalist Rating, these indexes may experience some impact to the constituent selection at the scheduled semi-annual reconstitutions. Morningstar Indexes will closely monitor turnover in the indexes during the rebalance and reconstitution periods.

Impacted indexes:

- Morningstar Medalist China Equity Funds
- Morningstar Medalist China Fixed-Income Funds
- Morningstar Medalist Europe Equity Funds
- Morningstar Medalist Europe Fixed-Income Funds

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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