

Morningstar Indexes

August 4, 2025

Index Name Change Notice

Dear Client,

Morningstar Indexes will update the Portfolio Names of the indexes listed [here](#) to align with the content in the Index Name field, which follow the Morningstar standard naming conventions. The changes will take effect on September 2, 2025. As a result, the file names for some of these indexes will be updated. The updated file names for the impacted indexes are listed [here](#). Please notify all relevant technical departments in your organization about the changes, as there may be an impact on your existing parser or other systems and processes.

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.

Contact Us

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