

September 12, 2023

Announcement: Retirement of the Morningstar Wide Moat Focus Balanced Target Volatility 5% Index

Morningstar Indexes will retire the Morningstar Wide Moat Focus Balanced Target Volatility 5% Index, effective after the close of Friday, September 22, 2023. This is due to the shift away from the existing calculation agent, and the planned launch of a more robust target volatility methodology. The final date of calculation will be Friday September 22, 2023. After this date, the index will be permanently retired.

Suggested alternative:

- Morningstar Wide Moat Focus Target Volatility 5%

Impacted indexes:

Index Name	Ticker
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER USD	MSWMB5EU
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged AUD	MSWMB5EA
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged CAD	MSWMB5EC
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged CHF	MSWMB5CE
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged EUR	MSWMB5EE
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged GBP	MSWMB5EG
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged JPY	MSWMB5EJ
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged SGD	MSWMB5ES
Morningstar Wide Moat Focus Balanced Target Volatility 5% ER Hedged THB	MSWMB5ET

Impacted files:

- YYYYMMDD_MWMFN.SDL
- YYYYMMDD_MSMFN.SDCL

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

MORNINGSTAR Indexes