

May 1, 2024

Consultation on Potential Termination of Decrement Return Variants for Morningstar Medalist Europe and Morningstar Eurozone 50 Equal Weight Indexes

Morningstar Indexes is considering terminating the decrement return variants of the following indexes:

Index Name	PerformanceId
Morningstar Eurozone 50 Equal Weight Decrement 5% ER USD	0P0001DGEA
Morningstar Eurozone 50 Equal Weight Decrement 5% ER JPY	0P0001DGEH
Morningstar Eurozone 50 Equal Weight Decrement 5% ER CAD	0P0001DGED
Morningstar Eurozone 50 Equal Weight Decrement 5% ER GBP	0P0001DGEG
Morningstar Eurozone 50 Equal Weight Decrement 5% ER AUD	0P0001DGEC
Morningstar Eurozone 50 Equal Weight Decrement 5% ER CHF	0P0001DGEF
Morningstar Eurozone 50 Equal Weight Decrement 5% ER EUR	0P0001DGEE
Morningstar Medalist Europe Equity Funds DR EUR	0P0001FT24
Morningstar Medalist Europe Fixed-Income Funds DR EUR	0P0001FT29

The remaining return variants of these indexes would not be impacted by this termination and would continue to be calculated. We are seeking feedback on this proposal. Morningstar Indexes will provide at least 90 days advance notice if a decision is made to terminate the calculation of these decrement return variants.

Submit your responses and questions

Responses to this consultation can be submitted [here](#).

General questions about the consultation may also be sent to indexes@morningstar.com.

Key dates

- **Consultation:** The consultation will be open for response from May 1 to May 7, 2024.

- **Decision announcement:** Final decisions will be announced by May 21, 2024.
- **Proposed implementation:** TBD

Questions

1. Do you currently use the decrement return series of any of the following indexes: Morningstar Eurozone 50 Equal Weight, Morningstar Medalist Europe Equity Funds, Morningstar Medalist Europe Fixed Income Funds?
 - a. No
 - b. Yes, please explain.
2. Do you have any objections to the termination of these decrement return variants?
 - a. No
 - b. Yes, please explain.
3. What other factors should Morningstar Indexes consider in making this decision?

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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