

August 11, 2025

Morningstar Equity Research Thematic Exposure Score Data

Morningstar Indexes is pleased to announce that the thematic exposure scores underpinning Morningstar's family of equity research-driven thematic indexes are available for license. These indexes are designed to deliver unparalleled, thematically pure exposure to a range of durable themes by drawing on the in-depth knowledge and forward-looking insights of Morningstar's equity research team.

These thematic exposure scores capture the degree to which the Morningstar equity research team expects a company's financial performance will be exposed to a given theme. They leverage insights regarding a company's role in the supply chain for associated products/services and estimates as to how a company's thematic exposures will impact revenue and net profits in the future. With this data, investors can better leverage the research that drives stock selection for Morningstar equity research-driven thematic indexes. The data set also provides greater transparency into Morningstar's thematic index construction process.

Please contact Colleen Gill for more information: colleen.gill@morningstar.com.

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.

The logo for Morningstar Indexes, featuring the word "MORNINGSTAR" in a bold, sans-serif font, followed by "Indexes" in a lighter, sans-serif font. The "M" is stylized with a red swoosh.

This email contains privileged and confidential information and is intended only for the use of the person(s) named above. Any dissemination, distribution, or duplication of this communication without prior written consent from Morningstar is strictly prohibited. If you have received this message in error, please contact the sender immediately and delete the materials from any computer.