

Morningstar Developed Markets Big Data & Robotics 50 Index

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Across industries, there has been an increase in demand for technologies that support greater business intelligence and automation, which can reduce costs and improve efficiency and quality. This may create attractive opportunities for companies that provide big data and robotics solutions.

The Morningstar® Developed Markets Big Data & Robotics 50 Index™ is designed to deliver unparalleled, thematically pure exposure to the Big Data & Analytics and Robotics themes by drawing on the in-depth knowledge and forward-looking insights of Morningstar's equity research team.

Big Data & Robotics themes

The Big Data & Analytics theme targets companies focused on capabilities with data sets too large and complex to manipulate or interrogate with standard methods or tools. Sub-themes include Artificial Intelligence & Machine Learning and Bioinformatics.

The Robotics theme focuses on the branch of technology that deals with the design, construction, operation, and application of robots. Advances in robotics have seemingly infinite potential applications, spanning technology, industrial, medical, and consumer-facing channels.

Thematic exposure scores

Through a thorough, standardized scoring process conducted by Morningstar equity analysts, companies are assigned thematic exposure scores for each theme.

This unique, forward-looking framework incorporates insights to assign the scores, which range from 0 through 4, with higher scores representing a higher degree of thematic purity. The scoring process considers each company's role in the supply chain, expected revenue exposure to the theme five years into the future, and whether the company is expected to experience a net profit increase from its exposure to the theme over the next five years.

Index eligibility and portfolio construction

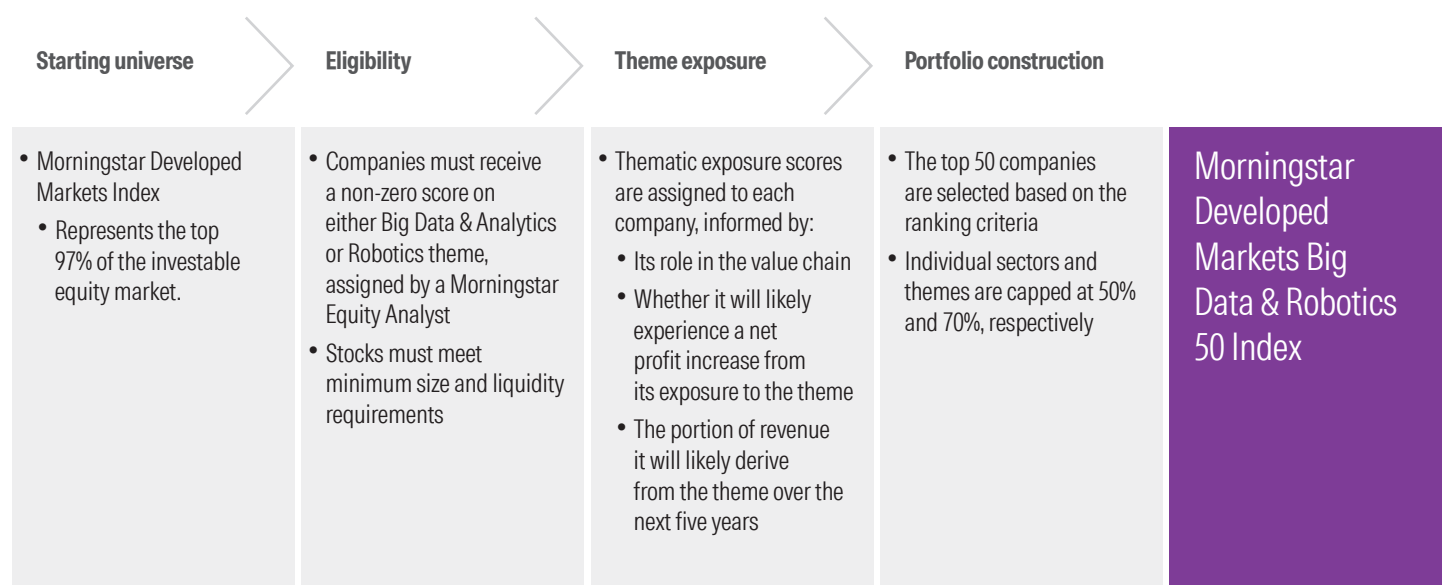
The Morningstar Developed Markets Big Data & Robotics 50 Index derives its constituents from the Morningstar Developed Markets Index, which represents the top 97% of the investable equity market. To be eligible for inclusion a stock must receive a non-zero exposure score on either the Big Data & Analytics or Robotics theme. To improve investment capacity, stocks must meet a minimum size requirement and also pass a liquidity screen.

Eligible companies are then ranked to maximize exposure to the Big Data & Analytics or Robotics themes. The top 50 constituents are targeted for inclusion. The index is equal weighted.

Reconstitution

The Morningstar Developed Markets Big Data and Robotics 50 Index is reconstituted and rebalanced annually in December.

Construction process



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.

Please visit indexes.morningstar.com for more information.