

Morningstar US Big Data & Analytics Index

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Technologies that support big data processing and business intelligence, such as artificial intelligence, can improve marketing, product quality, and help companies operate more efficiently. Growing demand for these tools can create attractive opportunities for companies that create and effectively extract insights from large datasets.

The Morningstar US Big Data & Analytics Index is designed to deliver unparalleled, thematically pure exposure to the Big Data & Analytics theme by drawing on the in-depth knowledge and forward-looking insights of Morningstar's equity research team. It targets the stocks of U.S. companies well positioned to benefit from Artificial Intelligence & Machine Learning and Bioinformatics.

Big Data & Analytics Theme

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.

Thematic exposure scores

Through a thorough, standardized scoring process conducted by Morningstar equity analysts, companies are assigned a thematic exposure score for the Big Data & Analytics theme. This unique, forward-looking framework incorporates analysts' insights to assign 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 Construction

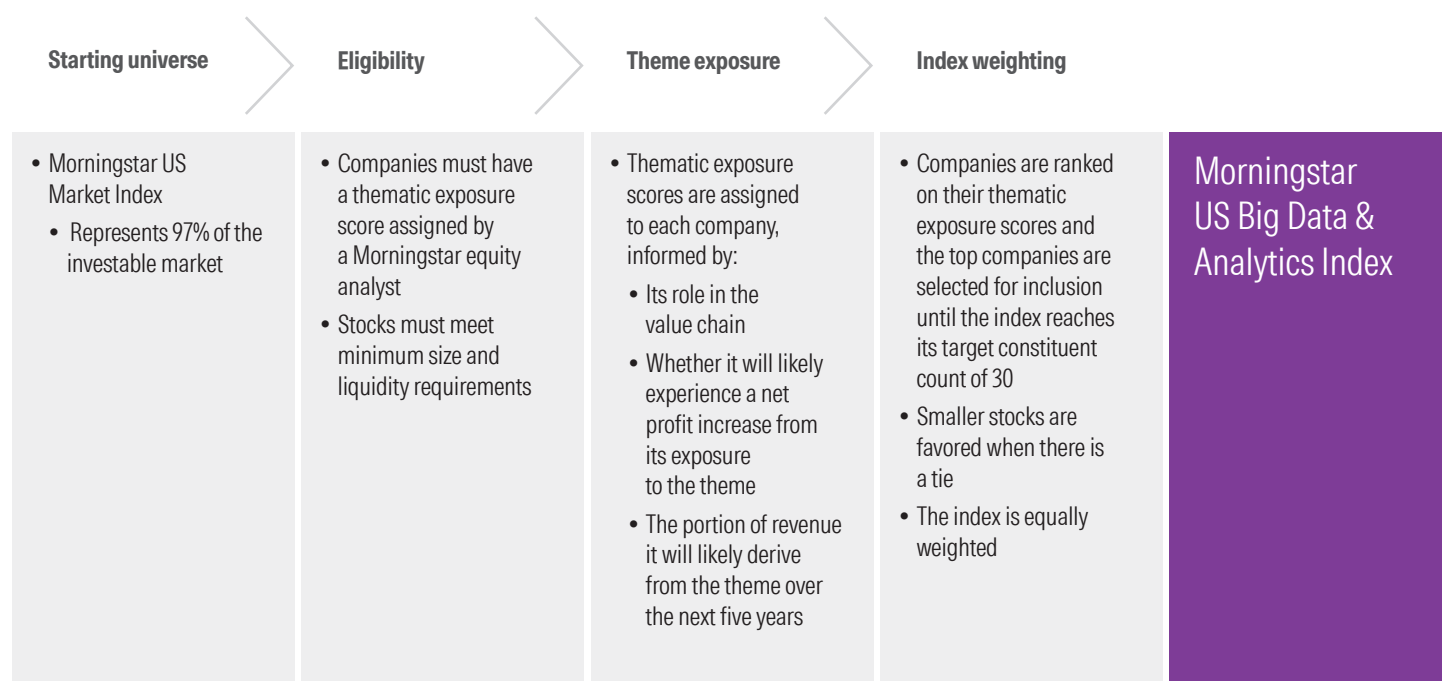
The Morningstar US Big Data & Analytics Index derives its constituents from the Morningstar US Markets Index, which represents the top 97% of the investable US equity market. Companies must be assigned a thematic exposure score of 1 or higher on the Big Data & Analytics theme and pass minimum liquidity requirements to be eligible for index membership. Those that pass the initial eligibility screens are then ranked to maximize exposure to the theme.

The highest-ranking stocks are selected for inclusion until the index reaches a constituent count of 30. The index is equal weighted.

Reconstitution

The Morningstar US Big Data & Analytics Index is reconstituted and rebalanced annually in December.

Construction process



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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.