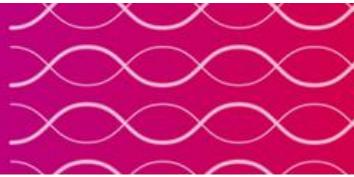


Morningstar Indexes



December 15, 2025

1 Week Reminder: Consultation Results - Morningstar Global Artificial Intelligence Select Index

Morningstar Indexes is making a methodology enhancement to the Morningstar Global Artificial Intelligence Select Index, implementing a daily check of the 5/25 capping constraint, following a [consultation](#) on this topic.

With this change, the constituent files will be checked at the end of each day to ensure the weightings of constituents above 5% do not sum to more than 25%. If this limit is breached at the end of day T, the smallest constituent above 5% would be capped at 4.5%, as well as any other constituent with weight between 4.5% and 5%. This would be done iteratively until the sum of the weightings above 5% is less than 25%. The excess weights would be distributed to the constituents below the 4.5% limit. This adjustment would be implemented at the open of T+2.

This enhancement is designed to mitigate turnover, while ensuring compliance with the capping constraint.

This change will be effective from December 22, 2025, on. There will be no change to the performance history or historical composition of the index.

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.