

January 30, 2026

Index Name Change Notice

Dear Client,

Morningstar Indexes will update the legal names of the indexes listed below to align with standard Morningstar index naming conventions. The changes will take effect on March 2, 2026.

| Portfolio ID | Current Index Name | Updated Index Name |
|---------------------|--|---|
| 3390314 | Morningstar LSTA US Covenant Light Loan | Morningstar LSTA US Covenant Lite Loan |
| 2920646 | Morningstar LSTA US Leveraged LoanSelect Equal Par Value | Morningstar LSTA US Leveraged Loan Select Equal Par Value |
| 2920560 | Morningstar LSTA US Leveraged LoanSelect Equal Weight | Morningstar LSTA US Leveraged Loan Select Equal Weight |

As a result, the file names for these indexes will be updated. The list of updated file names for the impacted indexes can be found [here](#). Please notify all relevant technical departments in your organization about the changes, as there may be an impact on your existing parser or other systems and processes.

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.

Contact Us

morningstar-indexes@alerts-morningstar.com is a no-reply email address.

For questions concerning this notification, please contact us at

indexes@morningstar.com.

 MORNINGSTAR Indexes