



February 27, 2026

**1 Day Reminder: 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.

<b>Portfolio ID</b>	<b>Current Index Name</b>	<b>Updated Index Name</b>
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. In February 2026, the acquisition of CRSP brought the CRSP Market Indexes—benchmarks for over \$3 trillion in US equities—into the Morningstar Indexes family. Additionally, CRSP’s Research Data Products, renowned for their academic rigor, historical depth and accuracy, will further enhance Morningstar’s equity research and data capabilities. This integration unites two trusted sources of market insight, reinforcing a shared commitment to transparency, quality, and investor-focused solutions.

Please visit [indexes.morningstar.com](https://indexes.morningstar.com) for more information.

### **Contact Us**

[morningstar-indexes@alerts-morningstar.com](mailto:morningstar-indexes@alerts-morningstar.com) is a no-reply email address.

For questions concerning this notification, please contact us at

[indexes@morningstar.com](mailto:indexes@morningstar.com).

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