

June 16, 2026

1 week Reminder: Consultation Results - Morningstar PH&C Developed Markets Low Carbon Select

After reviewing feedback from [the consultation](#) on the Morningstar PH&C Developed Markets Low Carbon Select Index, Morningstar Indexes is proceeding with the proposed methodology change to introduce a 6.1% maximum security-level cap to help manage concentration risk.

Impacted Index:

Portfolio ID	Index Name
3483102	Morningstar PH&C Developed Markets Low Carbon Select Index

Change:

The current methodology does not apply a maximum-security cap. In light of increasing concentration within developed equity markets, a 6.1% cap per security will be applied on a go-forward basis. Historical performance and historical index composition will remain unchanged.

These changes will be effective from the June reconstitution, June 22, 2026.

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 for more information.

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