



Morningstar Market Indexes Transitional Reconstitution Calendar

July 2026

The effective dates for the next 6 quarterly transitional reconstitutions for the [Morningstar Market Indexes](#) can be found below:

2026

September Quarter 2026

Ranking Date	After end of day Friday, September 4
Pro Forma Indexes Available via FTP	Sunday evening, September 6
Pro Forma Indexes Available via RADAR	Start of business Monday, September 8
Transitional Reconstitution Dates	After end of day Wednesday, September 16 – After end of day Tuesday, September 22
Reconstitution Effective	Market Open Wednesday, September 23

December Quarter 2026

Ranking Date	After end of day Friday, December 4
Pro Forma Indexes Available via FTP	Sunday evening, December 6
Pro Forma Indexes Available via RADAR	Start of business Monday, December 7
Transitional Reconstitution Dates	After end of day Wednesday, December 16 – After end of day Tuesday, December 22
Reconstitution Effective	Market Open Wednesday, December 23

2027**March Quarter 2027**

Ranking Date	After end of day Friday, March 5
Pro Forma Indexes Available via FTP	Sunday evening, March 7
Pro Forma Indexes Available via RADAR	Start of business Monday, March 8
Transitional Reconstitution Dates	After end of day Wednesday, March 17 – After end of day Tuesday, March 23
Reconstitution Effective	Market Open Wednesday, March 24

June Quarter 2027

Ranking Date	After end of day Friday, June 4
Pro Forma Indexes Available via FTP	Sunday evening, June 6
Pro Forma Indexes Available via RADAR	Start of business Monday, June 7
Transitional Reconstitution Dates	After end of day Tuesday, June 15 – After end of day Tuesday, June 22
Reconstitution Effective	Market Open Wednesday, June 23

September Quarter 2027

Ranking Date	After end of day Friday, September 3
Pro Forma Indexes Available via FTP	Sunday evening, September 5
Pro Forma Indexes Available via RADAR	Start of business Tuesday, September 7
Transitional Reconstitution Dates	After end of day Wednesday, September 15 – After end of day Tuesday, September 21
Reconstitution Effective	Market Open Wednesday, September 22

December Quarter 2027

Ranking Date	After end of day Friday, December 3
Pro Forma Indexes Available via FTP	Sunday evening, December 5
Pro Forma Indexes Available via RADAR	Start of business Monday, December 6
Transitional Reconstitution Dates	After end of day Wednesday, December 15 – After end of day Tuesday, December 21
Reconstitution Effective	Market Open Wednesday, December 22

For more information on the index maintenance, please refer to the [Morningstar Market Indexes Series Rulebook](#).

About Morningstar Indexes

Morningstar Indexes was built to meet 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 AUM—into the Morningstar Indexes family. Rebranded to the Morningstar Market Indexes in July 2026, these indexes are recognized globally for their high-quality methodology and focus on investability. 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.

Contact Us

indexes@morningstar.com