

August 18, 2026

### **Product Update: Morningstar Leveraged Loan Indexes - Additional Data Availability**

Morningstar Indexes is pleased to announce additional data availability for the Morningstar Leveraged Loan Indexes. These enhancements are a part of an ongoing initiative to enhance the historical data available for the indexes. Details are available below.

#### **Index Level and Constituent Level History Now Available in the Morningstar Format for Select Sub Indexes**

Morningstar can now deliver historical index level (IDX) and constituent level (CON) files from January 2, 2014 onwards in the Morningstar for the [attached list of indexes](#).

Historical files will be delivered on an as-requested basis. To receive historical constituent data, a license for historical constituent data is required. If your firm would like to receive this data or is unsure of licensing status, please reach out to [morningstarindexesimplementation@morningstar.com](mailto:morningstarindexesimplementation@morningstar.com).

#### **New Ex Software Indexes Added to Index Packages**

As of August 4 2026, Morningstar has [launched](#) the following indexes:

- Morningstar LSTA US Leveraged Loan ex Software Index
- Morningstar LSTA US Performing Loans ex Software Index
- Morningstar LSTA US BB Ratings Loan ex Software Index
- Morningstar LSTA US B Ratings Loan ex Software Index
- Morningstar LSTA US CCC Ratings Loan ex Software Index
- Morningstar LSTA US Leveraged Loan 100 ex Software Index
- Morningstar European Leveraged Loan ex Software Index
- Morningstar European BB Ratings Loan ex Software Index
- Morningstar European B Ratings Loan ex Software Index
- Morningstar European CCC Ratings Loan ex Software Index

- Morningstar Global Leveraged Loan ex Software Index

The Morningstar Leveraged Loan ex Software Indexes are designed to exclude the software sector, isolating the performance of the broad leveraged loan market from sector-specific stress.

These indexes are now available in the existing US, European, and Global & Tradable loan packages. For clients licensed for the associated package, no additional licensing is required to receive these indexes or their history.

### 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 AUM—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

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**MORNINGSTAR** Indexes