MORNINGSTAR Indexes

Morningstar PIMFA Indexes Implementation Calendar

November 2026

The effective dates for the next 8 quarterly reconstitutions for the Morningstar PIMFA Private Investor Index Series and Morningstar PIMFA Equity Risk Index Series can be found below:

Reconstitution	Effective Date
November 2026	01/12/2026
February 2027	01/03/2027
May 2027	01/06/2027
August 2027	01/09/2027
November 2027	01/12/2027
February 2028	01/03/2027
May 2028	01/06/2028
August 2028	01/09/2028

For more information on the index maintenance, please refer to the Morningstar PIMFA Private Investor Index Series Rulebook and Morningstar PIMFA Equity Risk Index Series Rulebook.

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.

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