



August 28, 2026

30 Day Reminder: Retirement of the 4pm Variants of Morningstar Fixed Income and Multi-Asset Indexes

Morningstar Indexes will retire the 4pm variants of Morningstar Fixed Income and Multi-Asset Indexes effective **September 28, 2026**. After the cessation date, the indexes will be permanently retired and will no longer be available in any ongoing file deliveries.

For clients seeking similar exposure refer to the equivalent index below.

Impacted Indexes and Equivalents

Impacted Variants	Equivalent Index
Morningstar US Core Bond 4PM TR USD	Morningstar US Core Bond TR USD
Morningstar US 1-3 Yr Core Bond 4PM TR USD	Morningstar US 1-3 Yr Core Bond TR USD
Morningstar US 1-5 Yr Core Bond 4PM TR USD	Morningstar US 1-5 Yr Core Bond TR USD
Morningstar US 5-10 Yr Core Bond 4PM TR USD	Morningstar US 5-10 Yr Core Bond TR USD
Morningstar US 10+ Yr Core Bond 4PM TR USD	Morningstar US 10+ Yr Core Bond TR USD
Morningstar US 1-5 Yr Treasury Inflation-Protected Securities 4PM TR USD	Morningstar US 1-5 Yr Treasury Inflation-Protected Securities TR USD

Morningstar US 10+ Yr Treasury Inflation-Protected Securities 4PM TR USD	Morningstar US 10+ Yr Treasury Inflation-Protected Securities TR USD
Morningstar US 1-10 Yr Core Bond 4PM TR USD	Morningstar US 1-10 Yr Core Bond TR USD
Morningstar US 1-10 Yr Core Bond 4 PM PR USD	Morningstar US 1-10 Yr Core Bond PR USD
Morningstar US Mortgage-Backed Securities 4PM TR USD	Morningstar US Mortgage-Backed Securities TR USD
Morningstar Lifetime Allocation Aggressive 2000 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2000 NR USD
Morningstar Lifetime Allocation Aggressive 2005 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2005 NR USD
Morningstar Lifetime Allocation Aggressive 2010 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2010 NR USD
Morningstar Lifetime Allocation Aggressive 2015 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2015 NR USD
Morningstar Lifetime Allocation Aggressive 2020 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2020 NR USD
Morningstar Lifetime Allocation Aggressive 2025 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2025 NR USD
Morningstar Lifetime Allocation Aggressive 2030 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2030 NR USD

Morningstar Lifetime Allocation Aggressive 2035 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2035 NR USD
Morningstar Lifetime Allocation Aggressive 2040 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2040 NR USD
Morningstar Lifetime Allocation Aggressive 2045 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2045 NR USD
Morningstar Lifetime Allocation Aggressive 2050 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2050 NR USD
Morningstar Lifetime Allocation Aggressive 2055 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2055 NR USD
Morningstar Lifetime Allocation Aggressive 2060 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2060 NR USD
Morningstar Lifetime Allocation Aggressive 2065 4PM NR USD	Morningstar Lifetime Allocation Aggressive 2065 NR USD
Morningstar Lifetime Allocation Aggressive Income 4PM NR USD	Morningstar Lifetime Allocation Aggressive Income NR USD
Morningstar Lifetime Allocation Conservative 2000 4PM NR USD	Morningstar Lifetime Allocation Conservative 2000 NR USD
Morningstar Lifetime Allocation Conservative 2005 4PM NR USD	Morningstar Lifetime Allocation Conservative 2005 NR USD
Morningstar Lifetime Allocation Conservative 2010 4PM NR USD	Morningstar Lifetime Allocation Conservative 2010 NR USD

Morningstar Lifetime Allocation Conservative 2015 4PM NR USD	Morningstar Lifetime Allocation Conservative 2015 NR USD
Morningstar Lifetime Allocation Conservative 2020 4PM NR USD	Morningstar Lifetime Allocation Conservative 2020 NR USD
Morningstar Lifetime Allocation Conservative 2025 4PM NR USD	Morningstar Lifetime Allocation Conservative 2025 NR USD
Morningstar Lifetime Allocation Conservative 2030 4PM NR USD	Morningstar Lifetime Allocation Conservative 2030 NR USD
Morningstar Lifetime Allocation Conservative 2035 4PM NR USD	Morningstar Lifetime Allocation Conservative 2035 NR USD
Morningstar Lifetime Allocation Conservative 2040 4PM NR USD	Morningstar Lifetime Allocation Conservative 2040 NR USD
Morningstar Lifetime Allocation Conservative 2045 4PM NR USD	Morningstar Lifetime Allocation Conservative 2045 NR USD
Morningstar Lifetime Allocation Conservative 2050 4PM NR USD	Morningstar Lifetime Allocation Conservative 2050 NR USD
Morningstar Lifetime Allocation Conservative 2055 4PM NR USD	Morningstar Lifetime Allocation Conservative 2055 NR USD
Morningstar Lifetime Allocation Conservative 2060 4PM NR USD	Morningstar Lifetime Allocation Conservative 2060 NR USD
Morningstar Lifetime Allocation Conservative 2065 4PM NR USD	Morningstar Lifetime Allocation Conservative 2065 NR USD

Morningstar Lifetime Allocation Conservative Income 4PM NR USD	Morningstar Lifetime Allocation Conservative Income NR USD
Morningstar Lifetime Allocation Moderate 2000 4PM NR USD	Morningstar Lifetime Allocation Moderate 2000 NR USD
Morningstar Lifetime Allocation Moderate 2005 4PM NR USD	Morningstar Lifetime Allocation Moderate 2005 NR USD
Morningstar Lifetime Allocation Moderate 2010 4PM NR USD	Morningstar Lifetime Allocation Moderate 2010 NR USD
Morningstar Lifetime Allocation Moderate 2015 4PM NR USD	Morningstar Lifetime Allocation Moderate 2015 NR USD
Morningstar Lifetime Allocation Moderate 2020 4PM NR USD	Morningstar Lifetime Allocation Moderate 2020 NR USD
Morningstar Lifetime Allocation Moderate 2025 4PM NR USD	Morningstar Lifetime Allocation Moderate 2025 NR USD
Morningstar Lifetime Allocation Moderate 2030 4PM NR USD	Morningstar Lifetime Allocation Moderate 2030 NR USD
Morningstar Lifetime Allocation Moderate 2035 4PM NR USD	Morningstar Lifetime Allocation Moderate 2035 NR USD
Morningstar Lifetime Allocation Moderate 2040 4PM NR USD	Morningstar Lifetime Allocation Moderate 2040 NR USD
Morningstar Lifetime Allocation Moderate 2045 4PM NR USD	Morningstar Lifetime Allocation Moderate 2045 NR USD

Morningstar Lifetime Allocation Moderate 2050 4PM NR USD	Morningstar Lifetime Allocation Moderate 2050 NR USD
Morningstar Lifetime Allocation Moderate 2055 4PM NR USD	Morningstar Lifetime Allocation Moderate 2055 NR USD
Morningstar Lifetime Allocation Moderate 2060 4PM NR USD	Morningstar Lifetime Allocation Moderate 2060 NR USD
Morningstar Lifetime Allocation Moderate 2065 4PM NR USD	Morningstar Lifetime Allocation Moderate 2065 NR USD
Morningstar Lifetime Allocation Moderate Income 4PM NR USD	Morningstar Lifetime Allocation Moderate Income NR USD

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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