Change Release Timeline

- **April 30, 2025 (Phase 1):**
  - Regular April updates to Categories and their benchmarks.
  - Launched the new Category Groups.
  - Mapped each Category and its constituent funds into their relevant Category Group.
  - Linked each new Category Group into one of the existing Global Broad Category Groups.
- **October 31, 2025 (Phase 2):**
  - Rename the existing Global Broad Category Group field to "Morningstar Category Broad Group."
  - Update names and identifiers within the Category Broad Group field.
  - Consolidate Commodities and Property into a single Category Broad Group called "Real Assets."
  - Re-map each Category Group into the new Category Broad Group schema.

What will clients need to do before October 31 (Phase 2)?

Clients should review the detailed information on their specific product impact, which includes the overall product impact with their applicable Category and Global Broad Category Group updates, as well as the actions needed to take to prepare for them.

Morningstar Product Impact and Client Action

Morningstar Data Services
- **Impact:** Morningstar Data Services will rename the Global Broad Category Group data point to Morningstar Category Broad Group. The other mapping updates will reflect once those are updated in the upstream sources. For the renaming, there are two locations where it will take place:
  - Individual Data Points:
    - We will rename Global Broad Category Group to Morningstar Category Broad Group.
    - We will rename Global Broad Category Group Id to Morningstar Category Broad Group Id
  - Morningstar Category Template:
    - We will rename the data point morningstar_global_broad_category_group_name to morningstar_category_broad_group_name.
    - We will rename the data point morningstar_global_broad_category_group_id to morningstar_category_broad_group_id.
- **Client Action:**
  - **Existing Feeds:** The renaming of data points will not impact existing feeds with the Morningstar Category data. However, clients who want to consume the renamed data points must edit their feed's data point list.

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