

Morningstar® US Sustainability Extended IndexSM

19-Dec-25

The index is designed to reduce environmental, social, and governance risk (ESG) by targeting stocks with low ESG Risk Ratings, representing 67% of the Morningstar US Large-Mid Index by float market capitalization. The Index is rebalanced quarterly and reconstituted semi-annually.

For More Information:
<http://indexes.morningstar.com>

US: +1 312 384-3735

Europe: +44 20 3194 1082

Reconstituted Holdings

Name	Ticker	Country	Sector	Weight (%)
NVIDIA Corp	NVDA	United States	Technology	10.00
Apple Inc	AAPL	United States	Technology	9.95
Microsoft Corp	MSFT	United States	Technology	9.27
Amazon.com Inc	AMZN	United States	Consumer Cyclical	5.70
Tesla Inc	TSLA	United States	Consumer Cyclical	2.20
Eli Lilly and Co	LLY	United States	Healthcare	2.14
JPMorgan Chase & Co	JPM	United States	Financial Services	1.92
Visa Inc	V	United States	Financial Services	1.41
Walmart Inc	WMT	United States	Consumer Defensive	1.19
Netflix Inc	NFLX	United States	Communication Services	1.14
Mastercard Inc	MA	United States	Financial Services	1.12
Costco Wholesale Corp	COST	United States	Consumer Defensive	1.01
AbbVie Inc	ABBV	United States	Healthcare	1.00
Bank of America Corp	BAC	United States	Financial Services	0.90
Advanced Micro Devices Inc	AMD	United States	Technology	0.89
The Home Depot Inc	HD	United States	Consumer Cyclical	0.89
Procter & Gamble Co	PG	United States	Consumer Defensive	0.87
Cisco Systems Inc	CSCO	United States	Technology	0.77
International Business Machines Corp	IBM	United States	Technology	0.73
Coca-Cola Co	KO	United States	Consumer Defensive	0.71
Merck & Co Inc	MRK	United States	Healthcare	0.65
The Goldman Sachs Group Inc	GS	United States	Financial Services	0.62
Abbott Laboratories	ABT	United States	Healthcare	0.56
Thermo Fisher Scientific Inc	TMO	United States	Healthcare	0.55
Morgan Stanley	MS	United States	Financial Services	0.52
PepsiCo Inc	PEP	United States	Consumer Defensive	0.51
Applied Materials Inc	AMAT	United States	Technology	0.51
Intuitive Surgical Inc	ISRG	United States	Healthcare	0.51
Lam Research Corp	LRCX	United States	Technology	0.50
American Express Co	AXP	United States	Financial Services	0.49
Linde PLC	LIN	United States	Basic Materials	0.48
The Walt Disney Co	DIS	United States	Communication Services	0.47
Amgen Inc	AMGN	United States	Healthcare	0.46
Citigroup Inc	C	United States	Financial Services	0.46
AT&T; Inc	T	United States	Communication Services	0.46
Qualcomm Inc	QCOM	United States	Technology	0.46
NextEra Energy Inc	NEE	United States	Utilities	0.45
Intuit Inc	INTU	United States	Technology	0.44
Verizon Communications Inc	VZ	United States	Communication Services	0.43
TJX Companies Inc	TJX	United States	Consumer Cyclical	0.42
GE Vernova Inc	GEV	United States	Industrials	0.41
Booking Holdings Inc	BKNG	United States	Consumer Cyclical	0.40
Charles Schwab Corp	SCHW	United States	Financial Services	0.39
Accenture PLC	ACN	United States	Technology	0.39
Gilead Sciences Inc	GILD	United States	Healthcare	0.39

Morningstar® US Sustainability Extended IndexSM

Reconstituted Holdings

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KLA Corp	KLAC	United States	Technology	0.39
S&P; Global Inc	SPGI	United States	Financial Services	0.38
Boston Scientific Corp	BSX	United States	Healthcare	0.38
Danaher Corp	DHR	United States	Healthcare	0.37
Pfizer Inc	PFE	United States	Healthcare	0.36
BlackRock Inc	BLK	United States	Financial Services	0.36
Welltower Inc	WELL	United States	Real Estate	0.36
Capital One Financial Corp	COF	United States	Financial Services	0.35
Union Pacific Corp	UNP	United States	Industrials	0.34
Arista Networks Inc	ANET	United States	Technology	0.34
Adobe Inc	ADBE	United States	Technology	0.34
Lowe's Companies Inc	LOW	United States	Consumer Cyclical	0.34
Medtronic PLC	MDT	United States	Healthcare	0.34
Eaton Corp PLC	ETN	United States	Industrials	0.34
Stryker Corp	SYK	United States	Healthcare	0.34
Progressive Corp	PGR	United States	Financial Services	0.33
Palo Alto Networks Inc	PANW	United States	Technology	0.33
AppLovin Corp	APP	United States	Communication Services	0.32
Prologis Inc	PLD	United States	Real Estate	0.30
Deere & Co	DE	United States	Industrials	0.29
Vertex Pharmaceuticals Inc	VRTX	United States	Healthcare	0.27
McKesson Corp	MCK	United States	Healthcare	0.27
Chubb Ltd	CB	United States	Financial Services	0.27
Blackstone Inc	BX	United States	Financial Services	0.27
Automatic Data Processing Inc	ADP	United States	Technology	0.26
CVS Health Corp	CVS	United States	Healthcare	0.25
CME Group Inc	CME	United States	Financial Services	0.25
T-Mobile US Inc	TMUS	United States	Communication Services	0.25
Southern Co	SO	United States	Utilities	0.25
Bristol-Myers Squibb Co	BMJ	United States	Healthcare	0.25
Newmont Corp	NEM	United States	Basic Materials	0.25
MercadoLibre Inc	MELI	United States	Consumer Cyclical	0.24
Comcast Corp	CMCSA	United States	Communication Services	0.24
Duke Energy Corp	DUK	United States	Utilities	0.24
Trane Technologies PLC	TT	United States	Industrials	0.23
Intercontinental Exchange Inc	ICE	United States	Financial Services	0.22
Marsh & McLennan Companies Inc	MMC	United States	Financial Services	0.22
Cadence Design Systems Inc	CDNS	United States	Technology	0.21
O'Reilly Automotive Inc	ORLY	United States	Consumer Cyclical	0.21
American Tower Corp	AMT	United States	Real Estate	0.21
KKR & Co Inc	KKR	United States	Financial Services	0.20
CRH PLC	CRH	United States	Basic Materials	0.20
Waste Management Inc	WM	United States	Industrials	0.20
Howmet Aerospace Inc	HWM	United States	Industrials	0.20
Regeneron Pharmaceuticals Inc	REGN	United States	Healthcare	0.20
Marvell Technology Inc	MRVL	United States	Technology	0.19
U.S. Bancorp	USB	United States	Financial Services	0.19
Moodys Corp	MCO	United States	Financial Services	0.19
Aon PLC	AON	United States	Financial Services	0.19
Bank of New York Mellon Corp	BK	United States	Financial Services	0.19
Emerson Electric Co	EMR	United States	Industrials	0.19
Elevance Health Inc	ELV	United States	Healthcare	0.19
PNC Financial Services Group Inc	PNC	United States	Financial Services	0.19
Mondelez International Inc	MDLZ	United States	Consumer Defensive	0.19
Williams Companies Inc	WMB	United States	Energy	0.18

Morningstar® US Sustainability Extended IndexSM

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Name	Ticker	Country	Sector	Weight (%)
Equinix Inc	EQIX	United States	Real Estate	0.18
Nike Inc	NKE	United States	Consumer Cyclical	0.18
Illinois Tool Works Inc	ITW	United States	Industrials	0.18
The Cigna Group	CI	United States	Healthcare	0.18
Johnson Controls International PLC	JCI	United States	Industrials	0.18
United Parcel Service Inc	UPS	United States	Industrials	0.18
Ecolab Inc	ECL	United States	Basic Materials	0.17
Cummins Inc	CMI	United States	Industrials	0.17
Cencora Inc	COR	United States	Healthcare	0.17
Vertiv Holdings Co	VRT	United States	Industrials	0.17
Marriott International Inc	MAR	United States	Consumer Cyclical	0.17
Royal Caribbean Group	RCL	United States	Consumer Cyclical	0.17
AutoZone Inc	AZO	United States	Consumer Cyclical	0.17
Norfolk Southern Corp	NSC	United States	Industrials	0.17
CSX Corp	CSX	United States	Industrials	0.16
The Travelers Companies Inc	TRV	United States	Financial Services	0.16
Colgate-Palmolive Co	CL	United States	Consumer Defensive	0.16
Cintas Corp	CTAS	United States	Industrials	0.16
American Electric Power Co Inc	AEP	United States	Utilities	0.16
Arthur J. Gallagher & Co	AUG	United States	Financial Services	0.16
Hilton Worldwide Holdings Inc	HLT	United States	Consumer Cyclical	0.16
Sempra	SRE	United States	Utilities	0.15
FedEx Corp	FDX	United States	Industrials	0.15
Simon Property Group Inc	SPG	United States	Real Estate	0.15
Vistra Corp	VST	United States	Utilities	0.15
Roblox Corp	RBLX	United States	Communication Services	0.15
PayPal Holdings Inc	PYPL	United States	Financial Services	0.15
Air Products and Chemicals Inc	APD	United States	Basic Materials	0.15
IDEXX Laboratories Inc	IDXX	United States	Healthcare	0.14
Seagate Technology Holdings PLC	STX	United States	Technology	0.14
Zoetis Inc	ZTS	United States	Healthcare	0.14
Western Digital Corp	WDC	United States	Technology	0.14
Allstate Corp	ALL	United States	Financial Services	0.14
Marathon Petroleum Corp	MPC	United States	Energy	0.14
Becton Dickinson & Co	BDX	United States	Healthcare	0.14
Apollo Asset Management Inc.	APO	United States	Financial Services	0.14
Warner Bros. Discovery Inc	WBD	United States	Communication Services	0.14
SLB Ltd	SLB	United States	Energy	0.13
Valero Energy Corp	VLO	United States	Energy	0.13
Kinder Morgan Inc	KMI	United States	Energy	0.13
Aflac Inc	AFL	United States	Financial Services	0.13
United Rentals Inc	URI	United States	Industrials	0.13
Carvana Co	CVNA	United States	Consumer Cyclical	0.13
Digital Realty Trust Inc	DLR	United States	Real Estate	0.13
Realty Income Corp	O	United States	Real Estate	0.13
Edwards Lifesciences Corp	EW	United States	Healthcare	0.13
Cardinal Health Inc	CAH	United States	Healthcare	0.13
Ferguson Enterprises Inc	FERG	United States	Industrials	0.13
Baker Hughes Co	BKR	United States	Energy	0.12
Airbnb Inc	ABNB	United States	Consumer Cyclical	0.12
CBRE Group Inc	CBRE	United States	Real Estate	0.12
Exelon Corp	EXC	United States	Utilities	0.12
Workday Inc	WDAY	United States	Technology	0.12
Fastenal Co	FAST	United States	Industrials	0.12
Electronic Arts Inc	EA	United States	Communication Services	0.12

Morningstar® US Sustainability Extended IndexSM

Reconstituted Holdings

Name	Ticker	Country	Sector	Weight (%)
AMETEK Inc	AME	United States	Industrials	0.11
ONEOK Inc	OKE	United States	Energy	0.11
Cheniere Energy Inc	LNG	United States	Energy	0.11
Rockwell Automation Inc	ROK	United States	Industrials	0.11
Republic Services Inc	RSG	United States	Industrials	0.11
Agilent Technologies Inc	A	United States	Healthcare	0.11
Public Storage	PSA	United States	Real Estate	0.11
Carrier Global Corp	CARR	United States	Industrials	0.11
MetLife Inc	MET	United States	Financial Services	0.11
Ameriprise Financial Inc	AMP	United States	Financial Services	0.11
D.R. Horton Inc	DHI	United States	Consumer Cyclical	0.10
Take-Two Interactive Software Inc	TTWO	United States	Communication Services	0.10
Dell Technologies Inc	DELL	United States	Technology	0.10
Public Service Enterprise Group Inc	PEG	United States	Utilities	0.10
The Kroger Co	KR	United States	Consumer Defensive	0.10
Target Corp	TGT	United States	Consumer Defensive	0.10
MSCI Inc	MSCI	United States	Financial Services	0.10
American International Group Inc	AIG	United States	Financial Services	0.10
IQVIA Holdings Inc	IQV	United States	Healthcare	0.10
The Hartford Insurance Group Inc	HIG	United States	Financial Services	0.10
Prudential Financial Inc	PRU	United States	Financial Services	0.09
Martin Marietta Materials Inc	MLM	United States	Basic Materials	0.09
Crown Castle Inc	CCI	United States	Real Estate	0.09
eBay Inc	EBAY	United States	Consumer Cyclical	0.09
Sysco Corp	SY	United States	Consumer Defensive	0.09
GE HealthCare Technologies Inc	GEHC	United States	Healthcare	0.09
Kimberly-Clark Corp	KMB	United States	Consumer Defensive	0.09
Consolidated Edison Inc	ED	United States	Utilities	0.09
Ventas Inc	VTR	United States	Real Estate	0.09
Veeva Systems Inc	VEEV	United States	Healthcare	0.09
SoFi Technologies Inc	SOFI	United States	Financial Services	0.09
WEC Energy Group Inc	WEC	United States	Utilities	0.09
Otis Worldwide Corp	OTIS	United States	Industrials	0.09
Arch Capital Group Ltd	ACGL	United States	Financial Services	0.09
Keysight Technologies Inc	KEYS	United States	Technology	0.09
Keurig Dr Pepper Inc	KDP	United States	Consumer Defensive	0.08
Xylem Inc	XYL	United States	Industrials	0.08
Nasdaq Inc	NDAQ	United States	Financial Services	0.08
United Airlines Holdings Inc	UAL	United States	Industrials	0.08
State Street Corp	STT	United States	Financial Services	0.08
Copart Inc	CPRT	United States	Industrials	0.08
Ares Management Corp	ARES	United States	Financial Services	0.08
Ingersoll Rand Inc	IR	United States	Industrials	0.08
Verisk Analytics Inc	VRSK	United States	Industrials	0.08
Mettler-Toledo International Inc	MTD	United States	Healthcare	0.08
VICI Properties Inc	VICI	United States	Real Estate	0.08
Kenvue Inc	KVUE	United States	Consumer Defensive	0.08
Expedia Group Inc	EXPE	United States	Consumer Cyclical	0.07
Humana Inc	HUM	United States	Healthcare	0.07
Willis Towers Watson PLC	WTW	United States	Financial Services	0.07
M&T; Bank Corp	MTB	United States	Financial Services	0.07
Hewlett Packard Enterprise Co	HPE	United States	Technology	0.07
Fifth Third Bancorp	FITB	United States	Financial Services	0.07
Ameren Corp	AEE	United States	Utilities	0.07
LPL Financial Holdings Inc	LPLA	United States	Financial Services	0.07

Morningstar® US Sustainability Extended IndexSM

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Carnival Corp	CCL	United States	Consumer Cyclical	0.07
Synchrony Financial	SYF	United States	Financial Services	0.07
The Hershey Co	HSY	United States	Consumer Defensive	0.07
Pure Storage Inc	PSTG	United States	Technology	0.07
Occidental Petroleum Corp	OXY	United States	Energy	0.07
CoStar Group Inc	CSGP	United States	Real Estate	0.07
Reddit Inc	RDDT	United States	Communication Services	0.07
Extra Space Storage Inc	EXR	United States	Real Estate	0.07
Phillips 66	PSX	United States	Energy	0.07
Xcel Energy Inc	XEL	United States	Utilities	0.07
Equifax Inc	EFX	United States	Industrials	0.07
Cincinnati Financial Corp	CINF	United States	Financial Services	0.06
Biogen Inc	BIIB	United States	Healthcare	0.06
Iron Mountain Inc	IRM	United States	Real Estate	0.06
Dover Corp	DOV	United States	Industrials	0.06
Steris PLC	STE	United States	Healthcare	0.06
American Water Works Co Inc	AWK	United States	Utilities	0.06
General Mills Inc	GIS	United States	Consumer Defensive	0.06
Huntington Bancshares Inc	HBAN	United States	Financial Services	0.06
Northern Trust Corp	NTRS	United States	Financial Services	0.06
AvalonBay Communities Inc	AVB	United States	Real Estate	0.06
DexCom Inc	DXCM	United States	Healthcare	0.06
PulteGroup Inc	PHM	United States	Consumer Cyclical	0.06
Old Dominion Freight Line Inc	ODFL	United States	Industrials	0.06
Ulta Beauty Inc	ULTA	United States	Consumer Cyclical	0.06
Dollar General Corp	DG	United States	Consumer Defensive	0.06
Veralto Corp	VLTO	United States	Industrials	0.06
Waters Corp	WAT	United States	Healthcare	0.06
Citizens Financial Group Inc	CFG	United States	Financial Services	0.06
Eversource Energy	ES	United States	Utilities	0.06
HP Inc	HPQ	United States	Technology	0.06
Omnicom Group Inc	OMC	United States	Communication Services	0.06
Hubbell Inc	HUBB	United States	Industrials	0.06
The Estee Lauder Companies Inc	EL	United States	Consumer Defensive	0.06
Insulet Corp	PODD	United States	Healthcare	0.06
Devon Energy Corp	DVN	United States	Energy	0.06
Tapestry Inc	TPR	United States	Consumer Cyclical	0.06
Edison International	EIX	United States	Utilities	0.06
Halliburton Co	HAL	United States	Energy	0.06
CMS Energy Corp	CMS	United States	Utilities	0.06
Brown & Brown Inc	BRO	United States	Financial Services	0.06
WR Berkley Corp	WRB	United States	Financial Services	0.06
The Kraft Heinz Co	KHC	United States	Consumer Defensive	0.06
T. Rowe Price Group Inc	TROW	United States	Financial Services	0.06
Williams-Sonoma Inc	WSM	United States	Consumer Cyclical	0.06
Dollar Tree Inc	DLTR	United States	Consumer Defensive	0.05
Regions Financial Corp	RF	United States	Financial Services	0.05
NetApp Inc	NTAP	United States	Technology	0.05
Jabil Inc	JBL	United States	Technology	0.05
Equity Residential	EQR	United States	Real Estate	0.05
Flex Ltd	FLEX	United States	Technology	0.05
Quest Diagnostics Inc	DGX	United States	Healthcare	0.05
SBA Communications Corp	SBAC	United States	Real Estate	0.05
Constellation Brands Inc	STZ	United States	Consumer Defensive	0.05
Zoom Communications Inc	ZM	United States	Technology	0.05

Morningstar® US Sustainability Extended IndexSM

Reconstituted Holdings

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NiSource Inc	NI	United States	Utilities	0.05
Church & Dwight Co Inc	CHD	United States	Consumer Defensive	0.05
Liberty Media Corp	FWONK	United States	Communication Services	0.05
Illumina Inc	ILMN	United States	Healthcare	0.05
West Pharmaceutical Services Inc	WST	United States	Healthcare	0.05
Trimble Inc	TRMB	United States	Technology	0.05
Expeditors International of Washington Inc	EXPD	United States	Industrials	0.05
Arcor PLC	AMCR	United States	Consumer Cyclical	0.05
Lululemon Athletica Inc	LULU	United States	Consumer Cyclical	0.05
United Therapeutics Corp	UTHR	United States	Healthcare	0.05
CDW Corp	CDW	United States	Technology	0.05
Principal Financial Group Inc	PFG	United States	Financial Services	0.05
Live Nation Entertainment Inc	LYV	United States	Communication Services	0.05
C.H. Robinson Worldwide Inc	CHRW	United States	Industrials	0.05
Global Payments Inc	GPN	United States	Industrials	0.05
Centene Corp	CNC	United States	Healthcare	0.05
Smurfit WestRock PLC	SW	United States	Consumer Cyclical	0.05
Packaging Corp of America	PKG	United States	Consumer Cyclical	0.05
Rollins Inc	ROL	United States	Consumer Cyclical	0.05
Genuine Parts Co	GPC	United States	Consumer Cyclical	0.05
Charter Communications Inc	CHTR	United States	Communication Services	0.05
US Foods Holding Corp	USFD	United States	Consumer Defensive	0.05
Gartner Inc	IT	United States	Technology	0.04
Eversource Inc	EVERG	United States	Utilities	0.04
International Flavors & Fragrances Inc	IFF	United States	Basic Materials	0.04
Alliant Energy Corp	LNT	United States	Utilities	0.04
The Trade Desk Inc	TTD	United States	Communication Services	0.04
KeyCorp	KEY	United States	Financial Services	0.04
TechnipFMC PLC	FTI	United States	Energy	0.04
nVent Electric PLC	NVT	United States	Industrials	0.04
Somnigroup International Inc	SGI	United States	Consumer Cyclical	0.04
McCormick & Co Inc	MKC	United States	Consumer Defensive	0.04
Incyte Corp	INCY	United States	Healthcare	0.04
Hologic Inc	HOLX	United States	Healthcare	0.04
XPO Inc	XPO	United States	Industrials	0.04
Dow Inc	DOW	United States	Basic Materials	0.04
DuPont de Nemours Inc	DD	United States	Basic Materials	0.04
Jacobs Solutions Inc	J	United States	Industrials	0.04
TransUnion	TRU	United States	Financial Services	0.04
Texas Pacific Land Corp	TPL	United States	Energy	0.04
Royal Gold Inc	RGLD	United States	Basic Materials	0.04
Lennox International Inc	LII	United States	Industrials	0.04
Essex Property Trust Inc	ESS	United States	Real Estate	0.04
Southwest Airlines Co	LUV	United States	Industrials	0.04
Mid-America Apartment Communities Inc	MAA	United States	Real Estate	0.04
Burlington Stores Inc	BURL	United States	Consumer Cyclical	0.04
Invitation Homes Inc	INVH	United States	Real Estate	0.04
Pinterest Inc	PINS	United States	Communication Services	0.04
Best Buy Co Inc	BBY	United States	Consumer Cyclical	0.04
The Cooper Companies Inc	COO	United States	Healthcare	0.04
Labcorp Holdings Inc	LH	United States	Healthcare	0.04
Weyerhaeuser Co	WY	United States	Real Estate	0.04
Gen Digital Inc	GEN	United States	Technology	0.04
Performance Food Group Co	PFGC	United States	Consumer Defensive	0.04
Reliance Inc	RS	United States	Basic Materials	0.04

Morningstar® US Sustainability Extended IndexSM

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Name	Ticker	Country	Sector	Weight (%)
W.P. Carey Inc	WPC	United States	Real Estate	0.04
Allegion PLC	ALLE	United States	Industrials	0.04
Sun Communities Inc	SUI	United States	Real Estate	0.04
Paramount Skydance Corp	PSKY	United States	Communication Services	0.04
Kimco Realty Corp	KIM	United States	Real Estate	0.04
Carlisle Companies Inc	CSL	United States	Industrials	0.03
Equitable Holdings Inc	EQH	United States	Financial Services	0.03
Dynatrace Inc	DT	United States	Technology	0.03
Clorox Co	CLX	United States	Consumer Defensive	0.03
JB Hunt Transport Services Inc	JBHT	United States	Industrials	0.03
TKO Group Holdings Inc	TKO	United States	Communication Services	0.03
AECOM	ACM	United States	Industrials	0.03
Fox Corp	FOXA	United States	Communication Services	0.03
Zebra Technologies Corp	ZBRA	United States	Technology	0.03
LyondellBasell Industries NV	LYB	United States	Basic Materials	0.03
Zillow Group Inc	Z	United States	Communication Services	0.03
Southern Copper Corp	SCCO	United States	Basic Materials	0.03
Watsco Inc	WSO	United States	Industrials	0.03
The Carlyle Group Inc	CG	United States	Financial Services	0.03
News Corp	NWSA	United States	Communication Services	0.02
Fox Corp	FOX	United States	Communication Services	0.02
Bentley Systems Inc	BSY	United States	Technology	0.01
Zillow Group Inc	ZG	United States	Communication Services	0.01
News Corp	NWS	United States	Communication Services	0.01
Liberty Media Corp	FWONA	United States	Communication Services	0.01

Added Holdings

Name	Ticker	Country	Sector	Weight(%)	Previous Recon Failed Screen						
					Country/Sector Constraints	High Rank	ESG Risk Score	Controversy	Product Involvement	Addition to Universe	Other
JPMorgan Chase & Co	JPM	United States	Financial Services	1.92	•						
Costco Wholesale Corp	COST	United States	Consumer Defensive	1.01	•						
AppLovin Corp	APP	United States	Communication Services	0.32	•						
Southern Co	SO	United States	Utilities	0.25	•						
Newmont Corp	NEM	United States	Basic Materials	0.25	•						
Duke Energy Corp	DUK	United States	Utilities	0.24	•						
Vistra Corp	VST	United States	Utilities	0.15	•						
United Airlines Holdings Inc	UAL	United States	Industrials	0.08	•						
Ameren Corp	AEE	United States	Utilities	0.07	•						
Occidental Petroleum Corp	OXY	United States	Energy	0.07	•						
Phillips 66	PSX	United States	Energy	0.07	•						
Xcel Energy Inc	XEL	United States	Utilities	0.07	•						
The Kraft Heinz Co	KHC	United States	Consumer Defensive	0.06	•						
Illumina Inc	ILMN	United States	Healthcare	0.05	•						
C.H. Robinson Worldwide Inc	CHRW	United States	Industrials	0.05						•	

Morningstar® US Sustainability Extended IndexSM

Added Holdings

Name	Ticker	Country	Sector	Weight(%)	Previous Recon Failed Screen						
					Country/Sector Constraints	High Rank	ESG Risk Score	Controversy	Product Involvement	Addition to Universe	Other
Smurfit WestRock PLC*	SW	United States	Consumer Cyclical	0.05							•
Evergy Inc	EVERG	United States	Utilities	0.04	•						
The Trade Desk Inc	TTD	United States	Communication Services	0.04	•						
TechnipFMC PLC	FTI	United States	Energy	0.04						•	
nVent Electric PLC	NVT	United States	Industrials	0.04						•	
Jacobs Solutions Inc	J	United States	Industrials	0.04					•		
Royal Gold Inc	RGLD	United States	Basic Materials	0.04						•	
Southwest Airlines Co	LUV	United States	Industrials	0.04	•						
Labcorp Holdings Inc*	LH	United States	Healthcare	0.04							•
Paramount Skydance Corp	PSKY	United States	Communication Services	0.04						•	

*- Missing Data - ESGRiskScore

Morningstar® US Sustainability Extended IndexSM

Removed Holdings

Name	Ticker	Country	Sector	Previous Recon Failed Screen						
				Country/Sector Constraints	High Rank	ESG Risk Score	Controversy	Product Involvement	Dropped from the Parent Index	Other
Zscaler Inc shs	ZS	United States	Technology	•						
Yum Brands Inc.	YUM	United States	Consumer Cyclical	•						
Westinghouse Air Brake Technologies Corp Shs	WAB	United States	Industrials	•						
Unum Group Common Stock	UNM	United States	Financial Services						•	
UDR Inc.	UDR	United States	Real Estate						•	
Tyler Technologies Inc.	TYL	United States	Technology	•						
Truist Financial Corp	TFC	United States	Financial Services	•						
Tradeweb Markets Inc Shs	TW	United States	Financial Services						•	
Tractor Supply	TSCO	United States	Consumer Cyclical					•		
Toast Inc Class A	TOST	United States	Technology	•						
Teradyne Inc.	TER	United States	Technology	•						
Targa Resources Corp Common Stock	TRGP	United States	Energy	•						
TE Connectivity PLC Registered Shares	TEL	United States	Technology	•						
Synopsys Inc	SNPS	United States	Technology	•						
Starbucks Corporation	SBUX	United States	Consumer Cyclical	•						
Sprouts Farmers Markets Inc	SFM	United States	Consumer Defensive						•	
Snowflake Inc Ordinary Shares - Class A	SNOW	United States	Technology	•						
Snap Inc Registered Shs -A-	SNAP	United States	Communication Services						•	
ServiceNow Inc	NOW	United States	Technology	•						
Service Corporation International Common Stock	SCI	United States	Consumer Cyclical						•	
Salesforce Inc	CRM	United States	Technology	•						
Ross Stores Inc.	ROST	United States	Consumer Cyclical	•						
Revvity Inc	RVTY	United States	Healthcare						•	
RenaissanceRe Holdings Ltd	RNR	United States	Financial Services						•	
Reinsurance Group of America Inc	RGA	United States	Financial Services						•	
Regency Centers Corporation	REG	United States	Real Estate						•	
Pentair PLC Common Stock	PNR	United States	Industrials	•						
Paycom Software Inc Shs	PAYC	United States	Technology						•	
Paychex Inc.	PAYX	United States	Technology	•						
PTC Inc Common Stock	PTC	United States	Technology	•						
PPG Industries Inc.	PPG	United States	Basic Materials	•						
Owens-Corning Inc.	OC	United States	Industrials						•	
Oracle Corp	ORCL	United States	Technology	•						
Okta Inc Registered Shs -A-	OKTA	United States	Technology	•						
NXP Semiconductors NV Common Stock	NXPI	United States	Technology	•						

Morningstar® US Sustainability Extended IndexSM

Removed Holdings

Name	Ticker	Country	Sector	Previous Recon Failed Screen						
				Country/Sector Constraints	High Rank	ESG Risk Score	Controversy	Product Involvement	Dropped from the Parent Index	Other
NVR Inc.	NVR	United States	Consumer Cyclical	•						
Motorola Solutions Inc Common Stock	MSI	United States	Technology	•						
Monolithic Power Systems Inc.	MPWR	United States	Technology	•						
MongoDB Inc Shs	MDB	United States	Technology	•						
Molina Healthcare Inc.	MOH	United States	Healthcare						•	
Micron Technology Inc.	MU	United States	Technology	•						
Masco Corporation	MAS	United States	Industrials						•	
Liberty Broadband Corp Shs Series -C-	LBRDK	United States	Communication Services						•	
Liberty Broadband Corp Shs Series -A-	LBRDA	United States	Communication Services						•	
Lennar Corporation B	LEN/B	United States	Consumer Cyclical	•						
Lennar Corporation	LEN	United States	Consumer Cyclical	•						
Jack Henry & Associates Inc Common Stock	JKHY	United States	Technology						•	
J.M. Smucker Co.	SJM	United States	Consumer Defensive						•	
International Paper Co.	IP	United States	Consumer Cyclical	•						
HubSpot Inc Shs	HUBS	United States	Technology	•						
Hormel Foods Corporation	HRL	United States	Consumer Defensive						•	
Healthpeak Properties Inc	DOC	United States	Real Estate						•	
Guidewire Software Inc Common Stock	GWRE	United States	Technology	•						
Graco Incorporated	GGG	United States	Industrials	•						
GoDaddy Inc Shs -A-	GDDY	United States	Technology	•						
Fortinet Inc.	FTNT	United States	Technology	•						
First Solar Inc.	FSLR	United States	Technology	•						
Fidelity National Information Services Inc.	FIS	United States	Technology	•						
FactSet Research Systems Inc.	FDS	United States	Financial Services						•	
F5 Inc	FFIV	United States	Technology	•						
Everest Group Ltd	EG	United States	Financial Services						•	
Erie Indemnity Company A	ERIE	United States	Financial Services						•	
Equity Lifestyle Properties Inc.	ELS	United States	Real Estate						•	
Entergy Corporation	ETR	United States	Utilities	•						
East West Bancorp Inc Common Stock	EWBC	United States	Financial Services						•	
EQT Corporation	EQT	United States	Energy	•						
DoorDash Inc Ordinary Shares - Class A	DASH	United States	Consumer Cyclical	•						
Docusign Inc Ordinary Shares	DOCU	United States	Technology	•						
Deckers Outdoor Corporation	DECK	United States	Consumer Cyclical						•	
Datadog Inc shs A	DDOG	United States	Technology	•						

Morningstar® US Sustainability Extended IndexSM

Removed Holdings

Name	Ticker	Country	Sector	Previous Recon Failed Screen						
				Country/Sector Constraints	High Rank	ESG Risk Score	Controversy	Product Involvement	Dropped from the Parent Index	Other
CrowdStrike Holdings Inc Ordinary Shares - Class A	CRWD	United States	Technology	•						
Coupage Inc Ordinary Shares - Class A	CPNG	United States	Consumer Cyclical	•						
Corning Inc.	GLW	United States	Technology	•						
Conagra Brands Inc Shs	CAG	United States	Consumer Defensive						•	
Cognizant Technology Solutions Corporation A	CTSH	United States	Technology	•						
Clean Harbors Inc.	CLH	United States	Industrials						•	
Chipotle Mexican Grill Inc. A	CMG	United States	Consumer Cyclical	•						
CenterPoint Energy Inc.	CNP	United States	Utilities	•						
Camden Property Trust	CPT	United States	Real Estate						•	
CNH Industrial N.V. Shs	CNH	United States	Industrials						•	
Builders FirstSource Inc.	BLDR	United States	Industrials						•	
Brown-Forman Corporation B	BF/B	United States	Consumer Defensive						•	
Brown-Forman Corporation A	BF/A	United States	Consumer Defensive						•	
Broadridge Financial Solutions	BR	United States	Technology	•						
Booz Allen Hamilton Holding Corp Common Stock A	BAH	United States	Industrials						•	
Biomarin Pharmaceutical Inc.	BMRN	United States	Healthcare						•	
Berkshire Hathaway Inc. B	BRK/B	United States	Financial Services	•						
Ball Corporation	BALL	United States	Consumer Cyclical						•	
Avery Dennison Corp.	AVY	United States	Consumer Cyclical						•	
Autodesk Inc.	ADSK	United States	Technology	•						
Atlassian Corp	TEAM	United States	Technology	•						
Analog Devices Inc.	ADI	United States	Technology	•						
Amphenol Corporation	APH	United States	Technology	•						
American Homes 4 Rent	AMH	United States	Real Estate						•	
Align Technology Inc.	ALGN	United States	Healthcare						•	
Alexandria Real Estate Equities Inc.	ARE	United States	Real Estate						•	
Akamai Technologies Inc.	AKAM	United States	Technology						•	

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Sector Exposure

