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**FOR IMMEDIATE RELEASE****Morningstar Investment Management Europe Ltd Launches Morningstar Multi-Asset Fund Range**

*Series of blended multi-asset funds that span the Morningstar risk profiles of Moderately Cautious, Moderate, and Moderately Adventurous*

LONDON, 30 November 2020—Morningstar Investment Management Europe Ltd, part of the Morningstar Investment Management group and a subsidiary of Morningstar, Inc. (Nasdaq: MORN), today announced the launch of the Morningstar Multi-Asset Fund Range.

The [Morningstar Multi-Asset Fund Range](#) is a series of multi-asset funds that offer investors a choice of three different risk levels with equity exposure ranges of 30-50%, 50-70%, and 70-90% complemented by diversifying and other lower risk-type investments:

- CG Morningstar Multi Asset 40 Fund (equity exposure ranges of 30-50%)
- CG Morningstar Multi Asset 60 Fund (equity exposure ranges of 50-70%)
- CG Morningstar Multi Asset 80 Fund (equity exposure ranges of 70-90%)

The funds will invest in an active-passive blend, biased to passive funds to lower the cost for investors but will also have the flexibility to target high-conviction active funds. They are designed for U.K. investors seeking capital growth over the medium- to long-term within a risk-managed framework. Morningstar Multi-Asset Fund Range information sheet is available [here](#) and the Adviser brochure is available [here](#).

**Mike Coop, Head of Multi Asset Portfolio Management, EMEA, said,** "It is now possible to unlock the power of our award-winning asset allocation, leading global data, and research leveraged by Morningstar Investment Management, in one multi-asset fund range. With an asset allocation experience stretching back more than four decades, the funds provide investment exposures unavailable to most individual investors by not being limited to funds available on one platform. This wider fund universe and

use of ETFs—powered by Morningstar, Inc’s significant data and research capabilities— allows us to identify and access a broader array of opportunities.”

**Martin Coyle, Head of UK Business Development, said,** “We are excited to continue to support advisers through the expansion of our solutions, as we look to bring to market one of our most popular Managed Portfolios strategies in a fund structure. The Morningstar Multi-Asset Fund Range provides a robust, supported solution with diversified, high-quality, and cost-effective funds employing Morningstar’s global expertise. The series is competitively priced, with the blended approach offering the best of both worlds, that can be used as a one-stop solution or a core part of the clients’ portfolio.”

The estimated Ongoing Charges Figure (OCF) for the range is 0.60% for the Retail Share Class. The launch will expand the range of leading platforms offering Morningstar investment solutions, including those that currently offer the [Morningstar® Managed Portfolios™](#). In addition, the series will be mapped to Synaptic, Dynamic Planner, Defaqto, and Finametrica (a Morningstar, Inc. subsidiary) risk profiles.

Morningstar Investment Management group’s 100-plus investment team works with advisers and professional investors to deliver market-leading investment solutions supported by the company’s research-driven asset allocation, manager selection, and portfolio construction capabilities. Morningstar Managed Portfolios, the discretionary investment management offerings for UK investors, were launched in 2013. Managed Portfolios for investors in South Africa were established in 2016.

The investment objectives, risks, and charges and expenses of the Funds should be considered carefully prior to any investment. The associated fund prospectus should be consulted accordingly, prior to investing and is available [here](#).

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### **Notes to Editors**

Morningstar’s research and rating activities are not undertaken by Morningstar Investment Management Europe and as such, are not regulated by the UK Financial Conduct Authority. These activities are undertaken by other entities within the wider Morningstar Group. There are information barriers between Morningstar Investment Management Europe and other Morningstar research entities and any identified conflicts are managed in accordance with internal policies.

**About Morningstar Investment Management Europe Ltd. and Morningstar's Investment Management Group**

Morningstar Investment Management Europe Ltd. is a member of Morningstar's Investment Management group, a leading provider of discretionary investment management and advisory services. Guided by seven investment principles, the group is committed to focusing on its mission to design portfolios that help investors reach their financial goals. The group's global investment management team works as one to apply its disciplined investment process to all strategies and portfolios, bringing together core capabilities in asset allocation, investment selection, and portfolio construction. This robust process integrates proprietary research and leading investment techniques. As of Sept. 30, 2020, Morningstar's Investment Management group was responsible for more than US\$215 billion\* in assets under advisement and management across North America, EMEA, and Asia-Pacific. In the UK, Morningstar Investment Management Europe Ltd is authorised and regulated by the Financial Conduct Authority to provide these services to Professional clients.

*\*Includes assets under management and advisement for Morningstar Investment Management LLC, Morningstar Investment Services LLC, Morningstar Investment Management Europe Ltd., Morningstar Investment Management Australia Ltd., Ibbotson Associates Japan, Inc., Morningstar Investment Management South Africa (PTY) LTD, and Morningstar Associates, Inc. all of which are subsidiaries of Morningstar, Inc.*

**Carne Global Fund Managers (UK) Limited**

The CG Morningstar Multi Asset Funds (the "Funds") are sub-funds of CG Morningstar Multi Asset Fund ICVC. Carne Global Fund Managers (UK) Limited (CG) is the Authorised Corporate Director of the CG Morningstar Multi Asset funds. CG is registered in England No. 10704717 and is authorised and regulated in the United Kingdom by the Financial Conduct Authority. Registered office: 2nd Floor 107 Cheapside, London, England, EC2V 6DN.

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