Morningstar provides a platform for analysts, researchers, and authors to report on investment, personal finance, and economic topics fairly, accurately, and from an investor’s point of view. The firm was founded on a principle of independent research, and this policy helps ensure our credibility and commitment to investor success.

We follow a set of rules designed to maintain the transparency and independence of our editorial content. This policy articulates the standards that apply to authors of editorial content at Morningstar, regardless of the platform (excluding DBRS Morningstar, PitchBook, and Morningstar Sustainalytics).

The Editorial Integrity Policy is neither static nor all-encompassing. It is designed to work in tandem with our other company policies and procedures, including, but not limited to, Morningstar’s Code of Ethics and Integrity Policies for the manager research and equity research groups.
Morningstar Editorial Integrity Policy
August 2022

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*Editorial content* refers to Morningstar-created articles, videos, presentations, and graphics on public-facing editorial websites; printed materials; podcasts; blog posts written by our analysts and researchers; editorial sections of products such as the Research Portal in editions of Morningstar Cloud; any content that’s written by an analyst, but not in their coverage of a security; and columns and articles written for third-party publications in which the author is representing Morningstar. It can also include editorial-focused events that Morningstar hosts.

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