

Media Contact:

Mimi Celeste Taylor, +44 (0)20 3107 0109 or mimiceleste.taylor@morningstar.com

FOR IMMEDIATE RELEASE**Agenda Announced for 2020 Morningstar Investment Conference UK Digital Event**

LONDON, 6 October 2020 – Morningstar UK Limited, a subsidiary of Morningstar, Inc. (NASDAQ: MORN), a leading provider of independent investment research, announced the agenda for its 14th annual [Morningstar Investment Conference](#), to be held on the 16 and 17 November 2020 in an all-digital format.

The digital Morningstar Investment Conference is an immersive online event that will feature all the key benefits of our flagship industry conference, bringing together industry leaders and investing experts to discuss the latest developments and share new perspectives on the market.

Headlining presenters include **Devan Kaloo, Global Head of Equities, Aberdeen Standard Investments**, discussing China's greater significance in indices and the global economy over the next decade, and **Ben Whitmore, Head of Strategy, Value Equities, Jupiter Asset Management**, on the dilemma facing investors with value shares on many measures at their lowest valuation relative to growth shares in a generation. There will also be a panel discussion on navigating the ESG and impact investing landscape featuring three investment managers from **Schroders, M&G Investments**, and **Legal & General Investment Management**, moderated by Hortense Bioy, Director, Sustainability Research, EMEA and APAC, Morningstar.

Additional highlights of this year's conference include:

- **Holly Mackay**, CEO and Founder, Boring Money, on the six main types of investor when it comes to attitudes to ESG and sustainable saving to help identify key drivers, interest, and even funds which map to these different cohorts' priorities.
- **Carl Richards**, Creator, The Behavior Gap, on the value of real financial advice.

- **Michael Jantzi**, CEO, Sustainalytics, a Morningstar company, on ESG portfolio risks and how investments in companies, funds, and various sustainable finance instruments might result in positive societal and/or environmental outcomes.

Paul Malone, UK CEO & West EMEA Regional Leader, comments: “We look forward to welcoming delegates over the course of two days in this new, dynamic web-based format with live and on-demand sessions. This year's conference agenda remains ambitious in scope with a clear focus on covering topics that matter to advisers, especially in the context of this year's challenging environment, including the evolving landscape of sustainability, investor preferences, the value of 'Real Financial Advice', and updates on current trends across the major asset classes.”

For the full conference agenda, speaker biographies, and further information about the digital event, please [click here](#). Conference updates will be available on Twitter through the hashtag #MICUK.

Media Registration Information

Full-time members of the news media receive complimentary registration to the Morningstar Investment Conference. To register, please click [here](#). Members of the media will have access to an online press room with resources and media briefings.

Attendee Registration Information

We have taken the decision to open access to this year's conference by making it free for financial advisers and wealth managers to attend. Note: this is only open to financial advisers and wealth managers, and Morningstar reserves the right to rescind invites to those individuals who do not meet our registration criteria. To register, please click [here](#). Registrants for #MICUK get access to our digital conferences from around the world too. All content from our conferences will be accessible on the digital event platform, on-demand until 1 December 2020.

- Ends -

About Morningstar, Inc.

Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of products and services for individual investors, financial advisers, asset managers, retirement plan providers and sponsors, and institutional investors in the private capital markets. Morningstar provides data and research insights on a wide range of investment offerings, including managed investment products, publicly listed companies, private capital markets, and real-time global market data. Morningstar also offers investment management services through its investment advisory subsidiaries, with approximately \$205 billion in assets under advisement and management as of 30 June 2020. The company has operations in 27 countries. For more information, visit <https://www.morningstar.com/company>. Follow Morningstar on Twitter @MorningstarInc.

©2020 Morningstar, Inc. All Rights Reserved.

MORN-C