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**FOR IMMEDIATE RELEASE****Morningstar UK Announces Winners for 2020 Fund Manager of the Year Awards**

LONDON, 15 October 2020—Morningstar UK Limited, a subsidiary of Morningstar, Inc. (NASDAQ: MORN), a leading provider of independent investment research, announced the winners of this year's Rising Talent, Outstanding Fund Manager and Investment House Awards.

The annual Fund Manager of the Year Awards, now in their 14th year, recognise and celebrate the best of the UK fund management profession who are selected by Morningstar's Manager Research analysts.

The awards draw from Morningstar's qualitative forward-looking fund rating system, the Morningstar Analyst Rating™ for funds. Morningstar assigns the Analyst Rating to funds that analysts qualitatively assess, typically through manager interviews and other sources. That assessment turns on three key "pillars"—People, Process, and Parent—with the rating reflecting how well the analysts expect the fund to perform after fees, while also taking risk into account.

**The 2020 winners are:**

- **Outstanding Fund Manager**  
Clare Hart, JPM US Equity Income
- **Rising Talent**  
Kacper Brzezniak, Allianz Strategic Bond
- **Outstanding Investment House**  
Schroders

**Jonathan Miller, Director of UK Manager Research for Morningstar**, comments: "The past few months have been a tumultuous period with difficult markets, unique challenges and uncertainty, all of which have posed serious challenges to even the most sophisticated of investors. But it's not just about the short term, and our winners demonstrated strong skills in delivering for investors.

"We are pleased to announce Clare Hart has won the prestigious Outstanding Fund Manager Award. We look to this category to identify the manager we see as remarkable, both in terms of style and approach, who stood above peers with exceptional returns over the longer term. Hart has run the Gold Rated JPM US Equity Income since its December 2008 inception and the US mutual version (JPMorgan Equity) since August 2004.

"Kacper Brzezniak, co-manager on Allianz Strategic Bond, is the winner of our Rising Talent Award. Featuring fund managers with relatively shorter experience managing their funds, this category is intended to highlight an individual who has made a real mark on their respective portfolios and has potential to continue delivering strong returns for investors. Brzezniak, who joined Allianz GI in July 2016, has been involved with the Allianz

Gilt Yield strategy and became co-manager of the Strategic Bond fund in February 2019, and has demonstrated real skill and knowledge in such management.

“Schroders was recognised for the Outstanding Investment House Award. Schroders, with an Above Average Parent Rating, stood out for the firm’s managers and teams buying into a demonstrable culture, growing in a measured way, and adding depth to teams in areas where they’re seeing success.”

The winners were revealed in a digital format on Morningstar.co.uk. Click [here](#) for the video interview on Rising Talent announced on 13 October, [here](#) for Outstanding Fund Manager announced on 14 October and [here](#) for Outstanding Investment House Awards announced on 15 October.

- Ends -

### **Notes to Editors**

The Analyst Rating is Morningstar’s forward-looking, analyst-driven ratings system that takes the form of Gold, Silver, Bronze, Neutral, and Negative. The Analyst Rating denotes an analyst’s conviction in a fund’s investment merits. Analysts typically re-evaluate Analyst Ratings on an annual basis. For more information about Morningstar’s manager research and ratings, please click [here](#).

Rating shown is for the most relevant clean share class only. Other share classes may carry a different rating, dependent on fees. Hedged share classes are typically excluded.

For more information about Morningstar Awards, visit <https://go.morningstar.com/Morningstar-Awards> and for more information on the Morningstar Awards Qualitative Methodology, please click [here](#).

### **About Morningstar UK Limited and Morningstar, Inc.**

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*Analyst Ratings are subjective in nature and should not be used as the sole basis for investment decisions. Analyst Ratings are based on Morningstar analysts’ current expectations about future events and therefore involve unknown risks and uncertainties that may cause Morningstar’s expectations not to occur or to differ significantly from what was expected. Morningstar does not represent its Analyst Ratings to be guarantees nor should they be viewed as an assessment of a fund’s or the fund’s underlying securities’ creditworthiness. This press release is for informational purposes only; it should not be considered an offer or solicitation to buy or sell the mutual funds noted within.*

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