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Morningstar Investment Conference Digital Event Details and Agenda Now Available

CHICAGO, July 28, 2020 /PRNewswire/ -- [Morningstar, Inc.](https://www.morningstar.com) (Nasdaq: MORN), a leading provider of independent investment research, today announced the agenda for its [Morningstar Investment Conference](https://www.morningstar.com/morningstar-investment-conference), which will take place as a digital-only event Wednesday, Sept. 16 and Thursday, Sept. 17.

"As uncertainty around the pandemic and its financial implications persists for investors, the role of financial advisors continues to expand and becomes even more critical. At the same time, growing demand for stakeholder capitalism offers a chance for more investors to engage more personally with their portfolios and with a long-term view," said Kunal Kapoor, chief executive officer, Morningstar. "While our conference will look different this year, there's no more urgent time to give rise to independent research, insights, and solutions across the investing industry that help us all to empower investor success."

This year's digital conference experience comprises both live and on-demand sessions. Featuring four tracks—Active Investing, Passive Investing, Future of Investing, and Rethinking Retirement—the digital Morningstar Investment Conference brings together industry leaders and investing experts as they discuss the latest developments and share new perspectives on the market. This year's speakers include:

- **Rupal Bhansali**, chief investment officer and portfolio manager, Ariel Investments
- **Cathy Curtis**, founder and chief executive officer, Curtis Financial Planning
- **Larry Fink**, founder, chairman, and chief executive officer, BlackRock
- **Michael Jantzi**, founder and chief executive officer, Sustainalytics
- **Rezo Kanovich**, managing director, Artisan Partners
- **Kunal Kapoor**, chief executive officer, Morningstar
- **Rob Lovelace**, vice chairman, Capital Group
- **Anne Mathias**, global rates and foreign exchange strategist, Vanguard
- **Michael Mauboussin**, head of consultant research, Counterpoint Global
- **Alan Moore**, co-founder and chief executive officer, XY Planning Network
- **Rick Rieder**, managing director, BlackRock

A Morningstar research session featuring Haywood Kelly, Morningstar's global head of research, will focus on the importance of incorporating ESG risk into Morningstar's investment analysis processes. Aron Szapiro, Morningstar's director of policy research, will host a session on the future of regulation and investing in the era of the SECURE Act and Regulation Best Interest. Additionally, stock analysts from Morningstar's equity research group will participate in a panel on the key themes to watch for in the coming decade, including 5G, electric vehicles, renewables, and pharmaceuticals.

Christine Benz, director of personal finance at Morningstar, will moderate a discussion around the future of advice and key issues in independent investment advisory practices today with Don Phillips, managing director at Morningstar; Cathy Curtis, founder and chief executive officer at Curtis Financial Planning; and Alan Moore, co-founder and chief executive officer of the XY Planning Network.

Exhibitors and sponsors will be able to engage with digital Morningstar Investment Conference attendees through Virtual Booths, which include on-demand and live content, as well as the ability to connect with attendees on the platform during both days of the conference.

This year, Morningstar is working with Mesmerise Global to debut a virtual reality option for the digital Morningstar Investment Conference. MIC Virtual Reality (VR) pass holders will be immersed in a VR experience, taking them to the "front row" for live sessions, sponsor booths, and on-demand content. In addition to conference content, VR pass holders will be able to see the impact of their investment decisions using ESG risk factors in the "Morningstar Sustainable City" VR game, as well as how to support the environment with the "Save the Bees" VR game. The MIC Virtual Reality pass is \$699 and includes one preloaded Oculus Quest headset and access to the digital MIC (desktop/mobile) experience.

More information about the digital Morningstar Investment Conference is available at <https://go.morningstar.com/MIC>. Tune in on Twitter with #MICUS or #MICDigital and by following [@MorningstarInc](https://twitter.com/MorningstarInc).

Attendee Registration Information

The digital Morningstar Investment Conference costs \$149 per person, which includes all access to both days of research, analysis, and insights. Registration is available at <https://go.morningstar.com/MIC>. One week in advance of the conference, registered attendees will receive an email with credentials needed to access the digital Morningstar Investment Conference. All live and on-demand content from the digital Morningstar Investment Conference will be available for registered attendees through Oct. 18, 2020.

Media Registration Information

Full-time members of the news media receive complimentary registration to the digital Morningstar Investment Conference. For media registration, please visit [this link](#). Members of the media will have access to an online press room with resources and media briefings.

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 advisors, asset managers, retirement plan providers and sponsors, and institutional investors in the debt and 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, debt securities, and real-time global market data. Morningstar also offers investment management services through its investment advisory subsidiaries, with approximately \$179 billion in assets under advisement and management as of March 31, 2020. The Company has operations in 27 countries. For more information, visit www.morningstar.com/company. Follow Morningstar on Twitter [@MorningstarInc](https://twitter.com/MorningstarInc).

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