



JUNE 30, 2021

Morningstar Announces Agenda for 2021 Morningstar Investment Conference

Morningstar's annual investment conference will be held on September 22-24 and will feature ARK's Cathie Wood and Research Affiliates' Rob Arnott on stage together, as well as former Bill and Melinda Gates Foundation CEO Sue Desmond-Hellmann

CHICAGO, June 30, 2021 /PRNewswire/ -- Morningstar, Inc. (Nasdaq: MORN), a leading provider of independent investment research, today announced the agenda for its 33rd annual Morningstar Investment Conference, set to occur Wednesday, September 22 through Friday, September 24, 2021. This year's hybrid event will allow attendees to engage in any combination of three ways: in-person attendance at McCormick Place Convention Center in Chicago, digital attendance, and virtual reality attendance.

"As we wade into a post-pandemic world, we're eager to finally reconvene in person to discuss solutions for today's new normal and the challenges of tomorrow," said Kunal Kapoor, chief executive officer at Morningstar. "Whether you join on the ground or virtually, our conference this year will tackle pressing topics, such as diversity, cryptocurrency, and retirement planning, with a particularly keen focus on sustainable investing as the new face of long-term investing."

Morningstar's conference brings together top industry leaders and investing experts as they share research and provide new perspectives for investors. This year's speakers include:

- **Rob Arnott**, founder and chairman of the board, Research Affiliates
- **John Bellows**, portfolio manager, Western Asset
- **Bill Browder**, founder and chief executive officer, Hermitage Capital Management
- **Sue Desmond-Hellmann**, former chief executive officer, Bill and Melinda Gates Foundation
- **Jennifer Grancio**, chief executive officer, Engine No. 1
- **Megan Greene**, economist and senior fellow, Harvard Kennedy School
- **Kunal Kapoor**, chief executive officer, Morningstar

- **Dennis Lynch**, head of Counterpoint Global, Morgan Stanley
- **Bill Nygren**, portfolio manager, Oakmark Fund
- **Tiffany Wilding**, economist, PIMCO
- **Catherine Wood**, chief executive officer and chief investment officer, ARK Investment Management

Attendees are invited to celebrate Chicago and its blues history with a live performance by Grammy-award-winning musician Buddy Guy on Thursday, September 23.

In-person attendees will be required to adhere to the safety protocols as mandated by the city, state, and McCormick Place. Attendees who participate in the conference's virtual reality experience will be able to create personal avatars, connect and network with other virtual attendees, watch keynotes and mainstage sessions live, view sessions on-demand, tour Chicago, and play an ESG-themed investing game called "Sustainable City," all without leaving the virtual reality environment.

More information about the Morningstar Investment Conference, including the full agenda, hotel accommodations, and continuing-education credits, is available at <https://go.morningstar.com/MIC>. Tune in on Twitter with #MICUS or by following @MorningstarInc.

Registration Information

In-person attendance for the Morningstar Investment Conference, which includes digital access to the conference, costs \$749 per person through Wednesday, August 4 and includes all sessions, two breakfasts, lunch, and two receptions. After Wednesday, August 4, the registration fee is \$899 for in-person. The fee for digital registration is \$349 through Wednesday, August 4 and \$499 thereafter. Digital attendees will have access to all live broadcast sessions, including nine keynotes and four breakouts. All conference content is available on-demand through Oct. 24. The virtual reality option costs \$549; however, if attendees elect to bring their own VR headset the cost will be \$349. Registration is available online at <https://go.morningstar.com/MIC>. The Morningstar Investment Conference early bird pricing is available until Wednesday, August 4. The deadline to register for the VR and digital option is Tuesday, August 24, however, if

attendees plan to bring their own VR headset they must register by Tuesday, September 14.

Media Registration Information

Full-time, credentialed members of the news media may receive complimentary registration to the Morningstar Investment Conference. For media registration, please visit [this link](#) and select "Press: Digital Only" or "Press: In-Person + Digital."

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 and owners, 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 \$244 billion in assets under advisement and management as of March 31, 2021. The Company has operations in 29 countries. For more information, visit www.morningstar.com/company. Follow Morningstar on Twitter @MorningstarInc.

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