

Morningstar Wide Moat Focus Barclays VC 7% Index

Ticker BXIIMWM7	Asset Classes Equities; Treasury Futures	Inception Date 02/14/2007
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Overview

The Morningstar Wide Moat Focus Barclays VC 7% Index selects U.S. stocks that have been assigned a “Wide MOAT” rating by Morningstar, which seeks to identify companies with a long-term competitive advantage in their respective industry. The selected stocks are then combined with a portfolio of four Barclays US Treasury Futures indices. The Index seeks to enhance return and manage its risk exposure by adjusting the portfolio’s asset allocation on a monthly basis using techniques from Modern Portfolio Theory, the theory of optimizing expected returns based on a given level of market risk. The Index is a multi-asset class index that aims to provide stable returns across different market environments. To further control risk, the Index adds a volatility control overlay which aims to maintain its annual volatility level at or below 7%.



[Index Website](#)



[Index Fact Sheet](#)



[Index Overview](#)

Performance

Summary Performance

One Month

One Month

1 Year

1 Year

2 Year (annualized)

2 Year (annualized)

5 Year (annualized)

5 Year (annualized)

10 Year (annualized)

10 Year (annualized)

20 Year (annualized)

20 Year (annualized)

Year to Date

Year to Date

Historical Performance

Annualized Performance: -

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Performance of the Morningstar Wide Moat Focus Barclays VC 7% Index prior to 2007 is simulated. Simulated performance utilizes backward looking projections and should not be relied on as a predictor of future performance, which may differ substantially from the simulated performance reflected in this example.

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