

# Morningstar Wide Moat Focus Barclays VC 7% Index

Ticker <b>BXIIMWM7</b>	Asset Classes <b>Equities; Treasury Futures</b>	Inception Date <b>02/14/2007</b>
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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.

SB-10059-46 | 2025/05/14