

Morningstar Announces Nominees for 2023 Morningstar Awards for Investing Excellence Luxembourg

Luxembourg, 22 February 2023 -- [Morningstar, Inc.](#) (Nasdaq: MORN), a leading provider of independent investment research, today announced the nominees for the 2023 Morningstar Awards for Investing Excellence Luxembourg. The awards recognise those funds and asset managers that have served investors well over the long term and which Morningstar’s manager research team believes will be able to deliver strong risk-adjusted returns over time.

There are three types of Morningstar award: the Morningstar Category Awards, the Morningstar Asset Manager Awards, and the Morningstar Asset Manager Sustainable-Investing Awards.

The **nominees** for the 2023 Morningstar Awards for Investing Excellence Luxembourg are:

Morningstar Category Awards	Share Class	Nominees
Category Winner: Best EUR Allocation Fund	Cartesio Equity R	Cartesio
Category Winner: Best EUR Allocation Fund	Ruffer Total Return International	Ruffer
Category Winner: Best EUR Allocation Fund	DWS Concept Kaldemorgen	DWS
Category Winner: Best EUR Bond Fund	Candriam Bds Euro High Yld R EUR Cap	Candriam
Category Winner: Best EUR Bond Fund	Schroder ISF Sustainable Euro Credit	Schroders
Category Winner: Best EUR Bond Fund	Robeco European High Yield Bonds	Robeco
Category Winner: Best Europe Equity Fund	M&G (Lux) Eurp Strat Val A EUR Acc	M&G
Category Winner: Best Europe Equity Fund	Magallanes V.I. UCITS European Equity	Magallanes
Category Winner: Best Europe Equity Fund	BGF European Value Fund	BlackRock
Category Winner: Best Global Equity Fund	Schroder ISF Gbl Sust Gr A Acc USD	Schroders
Category Winner: Best Global Equity Fund	GuardCap Global Equity	GuardCap
Category Winner: Best Global Equity Fund	Robeco QI Emerging Conservative Equities	Robeco

Morningstar Asset Manager Awards	Nominees
Best Asset Manager	Robeco
Best Asset Manager	Vanguard
Best Asset Manager	J O Hambro
Best Asset Manager - Sustainable Investing	Robeco
Best Asset Manager - Sustainable Investing	BNP Paribas
Best Asset Manager - Sustainable Investing	Candriam

“These awards recognise funds and asset managers that have served investors well and which Morningstar’s Manager Research team believes will be able to deliver strong risk-adjusted returns in the longer term. Based on Morningstar’s forward-looking ratings for funds, the Morningstar manager research team carefully decide the finalists across individual fund markets.” said **Jeffrey Schumacher, Director of Manager Research EMEA, Morningstar**

The winners of the 2023 Morningstar Awards for Investing Excellence Luxembourg will be announced during a ceremony on March 8th.

Methodology

These awards are determined by a combination of risk-adjusted medium- to long-term performance track records and Morningstar’s forward-looking rating for funds, the Morningstar Analyst Rating™, complemented by the



Morningstar Quantitative Rating™ (MQR), when necessary. The MQR is a quantitative rating that seeks to emulate the Analyst Rating and uses the same Gold, Silver, Bronze, Neutral, Negative scale as the former. The Morningstar Asset Manager – Sustainable Investing Awards are determined by a combination of Morningstar’s ESG Commitment Level for asset managers, along with Morningstar’s sustainability metrics for funds and Manager Research analysts’ knowledge of the fund groups they assess in the context of the Morningstar Analyst Rating for funds.

The full methodology for the awards is available [here](#).

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 \$265 billion in assets under advisement and management as of Dec. 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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