



## Morningstar Announces Winners for 2023 Morningstar Awards for Investing Excellence Luxembourg

Luxembourg, 9 March -- [Morningstar, Inc.](#) (Nasdaq: MORN), a leading provider of independent investment research, yesterday announced the winners 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 Morningstar Awards for Investing Excellence commends funds and asset managers for serving 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 winners, across equity, fixed income, and multi-asset categories, as the leading funds within Luxembourg for investors. Additionally, with our Asset Manager Sustainable-Investing Awards, we seek to recognize asset managers that have built strong ESG capabilities and have proven track records of integrating sustainability principles into their investment organizations” said **Jeffrey Schumacher, Director of Manager Research EMEA, Morningstar Inc.**

The 2023 Morningstar Awards for Investing Excellence award winners in Luxembourg are:

<b>Morningstar Category Awards</b>	<b>Winner</b>	<b>Share Class</b>	<b>Morningstar Analyst Rating</b>
Category Winner: Best EUR Allocation Fund	Cartesio	Cartesio Equity	Bronze
Category Winner: Best EUR Bond Fund	Candriam	Candriam Bonds Euro High Yield	Silver
Category Winner: Best Europe Equity Fund	M&G	M&G (Lux) European Strategic Value	Bronze
Category Winner: Best Global Equity Fund	Schroders	Schroder ISF Global Sustainable Growth	Bronze

<b>Morningstar Asset Manager Awards</b>	<b>Winner</b>
Best Asset Manager	Robeco
Best Asset Manager - Sustainable Investing	Robeco

### 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 Ratings for Funds.

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



Awards  
2023™

### **About Morningstar**

Morningstar, Inc. is a leading provider of independent investment insights 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 \$246 billion in assets under advisement and management as of Dec. 31, 2022. The Company operates through wholly- or majority-owned subsidiaries in 32 countries. For more information, visit [www.morningstar.com/company](http://www.morningstar.com/company). Follow Morningstar on Twitter @MorningstarInc.

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