Morningstar, Inc.
Experts and Resource Directory

Morningstar, Inc. is a leading provider of independent investment data, research, and platforms with operations in 29 countries. The company offers an extensive line of products and services for individual investors, financial advisors, asset managers, retirement plan providers and sponsors, and institutional investors in the debt and private capital markets.

We provide 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.

As part of our mission to empower investor success, we are committed to making our data, research, and investing insights readily accessible to members of the media and to sharing our analysts' insights. Read on for a sampling of experts who are available for discussion and independent commentary across a variety of investing topics.

Complimentary Access and Resources Available to Members of the Media

- Attendance at Morningstar® Investment Conference
- Morningstar Investor
- Access to Morningstar Direct (*must be eligible for this subscription; please reach out to a member of our media team for more information*) as well as DBRS Morningstar ViewPoint, the PitchBook platform, and Sustainalytics Global Access
- *Morningstar® FundInvestor^{SM}, Morningstar® StockInvestor^{SM}, Morningstar® ETFInvestor^{SM}*, and *Morningstar® DividendInvestor^{SM}* newsletters and mobile apps
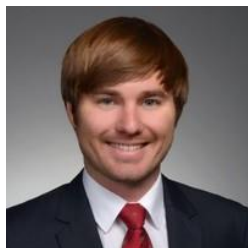
Experts Directory
Please contact our Newsroom (newsroom@morningstar.com) if you would like to connect with any of the spokespeople below or are seeking another Morningstar resource.

Equity Research

David Sekera is chief U.S. market strategist for Morningstar. David can discuss trends and Morningstar's outlook across global equity markets.

Preston Caldwell is the senior U.S. economics and equity analyst for Morningstar. Preston can discuss Morningstar's views on the U.S. economy, including U.S. GDP forecasts.

Madeline Hume is the NEXT senior research analyst for Morningstar. Madeline leads Morningstar's research efforts on emerging asset classes, including cryptocurrencies.

Adam Fleck is the director of ESG equity research for Morningstar. Adam leads Morningstar's environmental, social, and governance equity research, including collaboration with Sustainalytics.

Indexes

Rolf Agather is the global head of product and research for Morningstar Indexes. Rolf can discuss emerging trends in index-based investing and the growing use of market indexes by passive as well as active investors.

Tom Kuh is the head of ESG strategy for Morningstar Indexes. Tom can discuss the growing role of index-based ESG investment strategies, as well as other areas of ESG and sustainable investment from a regulatory, markets, and investor perspective.

Dan Lefkovitz is a strategist for Morningstar's Indexes group and can discuss trends across asset classes and sustainable investing approaches.

Katie Binns is director of fixed income & multi-asset indexes for Morningstar and can discuss topics related to fixed income and multi-asset indexes and investing and markets.

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Andrew Lane is director of equity research, index strategies at Morningstar. He can speak to the investment utility of market indexes that incorporate the insights of Morningstar Equity Research, including the Morningstar Wide MOAT Focus Index and other thematic index strategies.

Fund and Portfolio Research

Robby Greengold is a strategist on the manager research team for Morningstar. He covers the Ark Innovation ETF and is also the lead strategist on Fidelity.

Alec Lucas is a strategist on the manager research team for Morningstar. He covers equity strategies for asset managers and is the lead analyst on Vanguard, among other firms.

Bryan Armour is the director of passive strategist, North America for Morningstar. Bryan can discuss current ETF flows, the rise of thematic funds, and current events in the ETF markets.
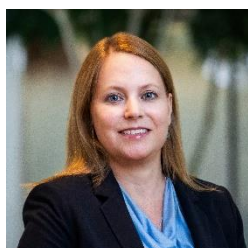
Megan Pacholok is an analyst on the manager research team for Morningstar. Megan covers multi-asset fund and college savings plans and leads Morningstar's target-date fund research.

Kenneth Lamont is a senior manager research analyst for passive strategies. He covers European passive funds and thematic funds.
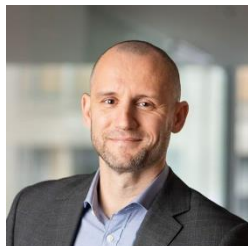
Jeffrey Ptak is the chief ratings officer responsible for approving new investment ratings methodologies for managed-investment strategies and equities, maintaining Morningstar's high quality and reporting standards for its growing portfolio of ratings, and leading a team focused on articulating Morningstar's best thinking in terms of portfolio construction. He also co-hosts The Long View podcast, covering a wide range of topics, such as asset allocation and balancing risk and return.

Amy Arnott is a portfolio strategist and author of Morningstar's most recent annual Mind the Gap study of investor returns. Amy can discuss best practices, including those around cryptocurrency, to help investors and advisors build smarter portfolios.

Morningstar Wealth

Daniel Needham is president of Morningstar Wealth, which includes investment management from Morningstar Investment Management, software and aggregation capacities from Morningstar Office and ByAllAccounts, and the individual investor experience across Morningstar.com.

Cindy Galiano is the managing director, U.S. Wealth Platform at Morningstar Wealth. She is responsible for product development, sales, marketing, and operations efforts supporting financial advisor-oriented products, such as Morningstar Office and Morningstar's turn-key asset management platform.

Marta Norton is chief investment officer for Morningstar Investment Management for the Americas at Morningstar Wealth. Marta can discuss the broad market outlook from the perspective of Morningstar Investment Management as well as trends in inflation and interest rates.

Philip Straehl is the global head of research for Morningstar Investment Management at Morningstar Wealth. Philip can discuss Morningstar Investment Management's key investment views across global equity and fixed income markets and key market trends.

Samantha Lamas is behavioral researcher for Morningstar. Sam's recent research has focused on investor engagement and the factors that drive people's decision making about investing and money. Her work delves into how people think about their financial goals, what they look for when seeking financial advice, and what kinds of mental shortcuts people use when making decisions about their personal finances.

Personal Finance

Christine Benz is the director of personal finance and retirement planning, author of *30-Minute Money Solutions* and *Morningstar® Guide to Mutual Funds*. She also co-hosts The Long View podcast, covering a wide range of topics, such as asset allocation and balancing risk and return.

Retirement

Brock Johnson is the president of Global Retirement and Workplace Solutions at Morningstar Investment Management and co-head of Morningstar's Investment Management RIA. Brock can discuss trends and the evolving landscape in the U.S. defined contribution and broader retirement space.

Jack VanDerhei is the director of retirement studies with Morningstar's Center for Retirement & Policy Studies. Jack's major areas of research focus on the financial aspects of private defined benefit and defined contribution plans.

Lia Mitchell is a senior analyst on the policy research team at Morningstar. Lia conducts research analyzing policy interventions leveraging Morningstar data and assists in developing and communicating Morningstar's policy positions.

Sustainable Investing

Martin Vezer is the associate director of ESG research for Sustainalytics. As head of the thematic research team, Martin focuses on a variety of wide-ranging ESG topics, including the carbon footprint of cryptocurrency.

Simon MacMahon is the executive vice president of Research Products for Sustainalytics. Simon oversees all ESG and corporate governance research at Sustainalytics and the management of Sustainalytics' ESG ratings products.

Anya Solovieva is the global commercial lead for Morningstar Sustainalytics' Climate Solutions. Anya has extensive knowledge of ESG-related investment analysis for empowering clients to meet global net zero commitments and have a better understanding of the exposure of physical risks in their portfolios.

Alyssa Stankiewicz is an associate director of sustainability research for Morningstar. She leads environmental, social, and governance research in North America, spearheading efforts on the ESG Commitment Level and publishing reports on the sustainable fund's landscape.

Hortense Bioy is global director of sustainability research and is based in the U.K. Hortense covers the global sustainable investing landscape and can discuss sustainable fund flows, assets, launches, repurposed funds, and SFDR.

Lindsey Stewart is director of investment stewardship research on Morningstar's global manager research team. Lindsey analyzes asset managers' sustainable-investing policies and practices with a focus on their engagement, proxy voting, and public policy outreach activities.

Policy Research

Lia Mitchell is a senior analyst on the policy research team at Morningstar. Lia conducts research analyzing policy interventions leveraging Morningstar data and assists in developing and communicating Morningstar's policy positions.

Private Markets

John MacDonagh is a senior emerging technology analyst, contributing to PitchBook's emerging technology research in the climate technology space. *(Please contact PitchBook PR at PR@pitchbook.com to set up time with John. Full institutional research analyst team can be found [here](#).)*