

S&P Dow Jones Indices Equity Index Rebalancing Schedule Consultation Results

NEW YORK, FEBRUARY 15, 2018: S&P Dow Jones Indices (“S&P DJI”) has conducted a consultation with members of the investment community on potential changes to the equity index rebalancing schedule for S&P and Dow Jones branded indices.

S&P DJI will not make any changes to the equity index rebalancing schedule at this time. The table below summarizes the results of each of the four proposals considered.

Proposal Considered	Result
September 2018 Rebalancing	The rebalancing effective date will remain unchanged, with rebalancing changes taking effect prior to the market open on Monday, September 24, 2018.
Subsequent Rebalancings	The schedule of index rebalancings subsequent to September 2018 will remain unchanged and indices will continue to adhere to their current rebalancing schedules.
Standard Quarterly Rebalancing Schedule	S&P DJI’s current standard quarterly rebalancing month set of March, June, September and December will not be modified at this time.
Multi-Day Rebalancing	S&P DJI will not be introducing multi-day rebalancing as a mainstream approach to rebalancing implementations at this time. The majority of S&P DJI’s equity indices will continue to implement rebalancings on a single day.

For more information about S&P Dow Jones Indices, please visit www.spdji.com.

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S&P Dow Jones Indices
index_services@spglobal.com