

## MEMORANDUM

To: Inline XBRL Filing of Tagged Data Proposal File

From: John Foley  
Senior Counsel, Division of Investment Management

Date: June 1, 2018

Re: Meeting with Representatives of Morningstar, Inc.

On May 22, 2018, David Bartels (Senior Special Counsel, Division of Investment Management (“IM”)), John Foley (Senior Counsel, IM), Michael Pawluk (Senior Special Counsel, IM), Sarah ten Siethoff (Deputy Associate Director, IM) and Hermine Wong (Special Counsel, Division of Economic and Risk Analysis) met with the following representatives of Morningstar, Inc.:

- Ben Alpert (Data Content Specialist, Fund Data Methodology);
- Frannie Besztery (Head of Data);
- Adrien Cloutier (Head of Data, Equity);
- Jesse Gimenez (Senior Technical Business Analyst, Data Collection);
- Sagar Patel (Data Content Specialist, Managed Investment Data);
- Aron Szapiro (Director of Policy Research); and
- Janet Yang (Global Data Director, Core Managed Investments).

Among other things, the participants discussed the Commission’s proposal on Inline XBRL filing of tagged data.