

# Fair Isaac & Co. Set to Join S&P 500; Others to Join S&P MidCap 400 and S&P SmallCap 600

NEW YORK, March 3, 2023 /PRNewswire/ -- S&P Dow Jones Indices ("S&P DJI") will make the following changes to the S&P 500, S&P MidCap 400 and S&P SmallCap 600 indices effective prior to the open of trading on Monday, March 20, to coincide with the quarterly rebalance. The changes are being made to ensure each index is more representative of its market capitalization range. The company moving to the S&P 500 is more representative of the large-cap market space. All companies moving to the S&P MidCap 400 are more representative of the mid-cap market space, and all companies moving to the S&P SmallCap 600 are more representative of the small-cap market space. The companies being discretionarily removed from the S&P SmallCap 600 are no longer representative of the small-cap market space.

- S&P MidCap 400 constituent Fair Isaac & Co Inc. (NYSE:FICO) will replace Lumen Technologies Inc. (NYSE:LUMN) in the S&P 500, and Lumen Technologies will replace Bed Bath & Beyond Inc (NASDAQ:BBBY) in the S&P SmallCap 600. Valaris Limited (NYSE:VAL) will replace Fair Isaac & Co in the S&P MidCap 400.
- Axalta Coating Systems Ltd (NYSE:AXTA), Autoliv Inc. (NYSE:ALV), Starwood Property Trust Inc. (NYSE:STWD), SouthState Corp. (NASDAQ:SSB), Chord Energy Corp. (NASDAQ:CHRD), Advanced Drainage Systems Inc. (NYSE:WMS), Hilton Grand Vacations Inc. (NYSE:HGV), Hertz Global Holdings Inc. (NASDAQ:HTZ), Aramark (NYSE:ARMK) and US Foods Holding Corp. (NYSE:USFD) will replace SL Green Realty Corp. (NYSE:SLG), Cracker Barrel Old Country Store Inc. (NASDAQ:CBRL), ViaSat Inc. (NASDAQ:VSAT), Washington Federal Inc. (NASDAQ:WAFD), Dycom Industries Inc. (NYSE:DY), Kennametal Inc. (NYSE:KMT), JBG Smith Properties (NYSE:JBGS), Pebblebrook Hotel Trust (NYSE:PEB), Hanesbrands Inc. (NYSE:HBI) and Tandem Diabetes Care Inc. (NASDAQ:TNDM) respectively in the S&P MidCap 400. All constituents being removed from the S&P MidCap 400 will be added to the S&P SmallCap 600 replacing The Pennant Group Inc. (NASDAQ:PNTG), Unisys Corp. (NYSE:UIS), Organogenesis Holdings Inc. (NASDAQ:ORGO), Surmodics Inc. (NASDAQ:SRDX), Hersha Hospitality Trust (NYSE:HT), Park Aerospace Corp. (NYSE:PKE), Granite Point Mortgage Trust Inc. (NYSE:GPMT), Industrial Logistics Properties Trust (NASDAQ:ILPT), OptimizeRx Corp. (NASDAQ:OPRX), and ZimVie Inc. (NASDAQ:ZIMV) respectively.
- Kennedy-Wilson Holdings Inc. (NYSE:KW), Atlantic Union Bankshares Corp. (NYSE:AUB), NexTier Oilfield Solutions Inc. (NYSE:NEX) and Radian Group Inc. (NYSE:RDN) will replace WW International Inc. (NASDAQ:WW), Franklin Street Properties Corp. (NYSE American:FSP), Motorcar Parts of America Inc. (NASDAQ:MPAA) and Universal Electronics Inc. (NASDAQ:UEIC) respectively in the S&P SmallCap 600.

Following is a summary of the changes that will take place prior to the open of trading on the effective date:

Effective Date	Index Name	Action	Company Name	Ticker	GICS Sector
March 20, 2023	S&P 500	Addition	Fair Isaac & Co	FICO	Information Technology
March 20, 2023	S&P 500	Deletion	Lumen Technologies	LUMN	Communication Services
March 20, 2023	S&P MidCap 400	Addition	Valaris Limited	VAL	Energy
March 20, 2023	S&P MidCap 400	Addition	Axalta Coating Systems	AXTA	Materials
March 20, 2023	S&P MidCap 400	Addition	Autoliv	ALV	Consumer Discretionary
March 20, 2023	S&P MidCap 400	Addition	Starwood Property Trust	STWD	Financials
March 20, 2023	S&P MidCap 400	Addition	SouthState	SSB	Financials
March 20, 2023	S&P MidCap 400	Addition	Chord Energy	CHRD	Energy
March 20, 2023	S&P MidCap 400	Addition	Advanced Drainage Systems	WMS	Industrials
March 20, 2023	S&P MidCap 400	Addition	Hilton Grand Vacations	HGV	Consumer Discretionary
March 20, 2023	S&P MidCap 400	Addition	Hertz Global Holdings	HTZ	Industrials
March 20, 2023	S&P MidCap 400	Addition	Aramark	ARMK	Consumer Discretionary
March 20, 2023	S&P MidCap 400	Addition	US Foods Holding	USFD	Consumer Staples
March 20, 2023	S&P MidCap 400	Deletion	Fair Isaac & Co	FICO	Information Technology
March 20, 2023	S&P MidCap 400	Deletion	Kennametal	KMT	Industrials
March 20, 2023	S&P MidCap 400	Deletion	JBG Smith Properties	JBGS	Real Estate
March 20, 2023	S&P MidCap 400	Deletion	Pebblebrook Hotel Trust	PEB	Real Estate

March 20, 2023	S&P MidCap 400	Deletion	Hanesbrands	HBI	Consumer Discretionary
March 20, 2023	S&P MidCap 400	Deletion	Tandem Diabetes Care	TNDM	Health Care
March 20, 2023	S&P MidCap 400	Deletion	SL Green Realty	SLG	Real Estate
March 20, 2023	S&P MidCap 400	Deletion	Cracker Barrel Old Country Store	CBRL	Consumer Discretionary
March 20, 2023	S&P MidCap 400	Deletion	ViaSat	VSAT	Information Technology
March 20, 2023	S&P MidCap 400	Deletion	Washington Federal	WAFD	Financials
March 20, 2023	S&P MidCap 400	Deletion	Dycom Industries	DY	Industrials
March 20, 2023	S&P SmallCap 600	Addition	Kennedy-Wilson Holdings	KW	Real Estate
March 20, 2023	S&P SmallCap 600	Addition	Atlantic Union Bankshares	AUB	Financials
March 20, 2023	S&P SmallCap 600	Addition	NexTier Oilfield Solutions	NEX	Energy
March 20, 2023	S&P SmallCap 600	Addition	Radian Group	RDN	Financials
March 20, 2023	S&P SmallCap 600	Addition	Lumen Technologies	LUMN	Communication Services
March 20, 2023	S&P SmallCap 600	Addition	SL Green Realty	SLG	Real Estate
March 20, 2023	S&P SmallCap 600	Addition	Cracker Barrel Old Country Store	CBRL	Consumer Discretionary
March 20, 2023	S&P SmallCap 600	Addition	ViaSat	VSAT	Information Technology
March 20, 2023	S&P SmallCap 600	Addition	Washington Federal	WAFD	Financials
March 20, 2023	S&P SmallCap 600	Addition	Dycom Industries	DY	Industrials
March 20, 2023	S&P SmallCap 600	Addition	Kennametal	KMT	Industrials
March 20, 2023	S&P SmallCap 600	Addition	JBG Smith Properties	JBGS	Real Estate
March 20, 2023	S&P SmallCap 600	Addition	Pebblebrook Hotel Trust	PEB	Real Estate
March 20, 2023	S&P SmallCap 600	Addition	Hanesbrands	HBI	Consumer Discretionary
March 20, 2023	S&P SmallCap 600	Addition	Tandem Diabetes Care	TNDM	Health Care
March 20, 2023	S&P SmallCap 600	Deletion	WW International	WW	Consumer Discretionary
March 20, 2023	S&P SmallCap 600	Deletion	Franklin Street Properties	FSP	Real Estate
March 20, 2023	S&P SmallCap 600	Deletion	Motorcar Parts of America	MPAA	Consumer Discretionary
March 20, 2023	S&P SmallCap 600	Deletion	Universal Electronics	UEIC	Consumer Discretionary
March 20, 2023	S&P SmallCap 600	Deletion	Bed Bath & Beyond	BBBY	Consumer Discretionary
March 20, 2023	S&P SmallCap 600	Deletion	The Pennant Group	PNTG	Health Care
March 20, 2023	S&P SmallCap 600	Deletion	Unisys Corp	UIS	Information Technology
March 20, 2023	S&P SmallCap 600	Deletion	Organogenesis Holdings	ORGO	Health Care
March 20, 2023	S&P SmallCap 600	Deletion	Surmodics	SRDX	Health Care
March 20, 2023	S&P SmallCap 600	Deletion	Hersha Hospitality Trust	HT	Real Estate
March 20, 2023	S&P SmallCap 600	Deletion	Park Aerospace	PKE	Industrials
March 20, 2023	S&P SmallCap 600	Deletion	Granite Point Mortgage Trust	GPMT	Financials
March 20, 2023	S&P SmallCap 600	Deletion	Industrial Logistics Properties	ILPT	Real Estate
March 20, 2023	S&P SmallCap 600	Deletion	OptimizeRx	OPRX	Health Care
March 20, 2023	S&P SmallCap 600	Deletion	ZimVie	ZIMV	Health Care

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**S&P Dow Jones Indices**  
[index\\_services@spglobal.com](mailto:index_services@spglobal.com)

**Media Inquiries**  
[spdji.comms@spglobal.com](mailto:spdji.comms@spglobal.com)

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