

Page: General Information

Provide information about the company to be considered for the award. If you will be nominating an individual, specify the nominee's employer.

Name of Organization/Company

Morningstar

Additional Contacts

I do not wish to list additional contacts

Page: Entry Information

Entry Title

Anusha Dwivedula Driving Responsible AI and Scalable Data Innovation in Financial Services

Category

E11. Employee of the Year - Artificial Intelligence

Employee Nominee Submission Format

Written Answers

a. Briefly describe the nominated non-executive person's employer: the organization's history and past performance (up to 200 words). Required

Morningstar, Inc. is a leading global provider of independent investment research and data, headquartered in Chicago and operating in over 30 countries. Founded in 1984, Morningstar delivers a comprehensive suite of products and services—including managed investment portfolios, investment research, proprietary risk models, and software platforms—serving individual investors, financial advisors, asset managers, and institutional investors.

Morningstar's mission is to empower investor success by delivering insights that investors can trust. Its offerings span public and private markets and are delivered through trusted platforms like Morningstar Direct, Advisor Workstation, and Morningstar Data. The firm's long-term strategy focuses on embedding Morningstar's insights into client workflows via scalable, cloud-enabled, and AI-driven platforms that enhance the transparency and usability of financial data.

Morningstar reported \$2.275 billion in 2024, an 11.6% increase from 2023, reflecting its growth and resilience across global markets. Its acquisition of PitchBook in 2016 and subsequent innovations—like the 2025 launch of the Morningstar PitchBook Buyout Replication Index—illustrate its leadership in combining public and private market insights. With over \$266 billion in assets under management and advisement (as of 2023) and more than 10,000 employees worldwide, Morningstar continues to set the standard for responsible, data-driven investment decision-making across the global financial ecosystem.

b. Outline the nominated non-executive employee's achievements since the beginning of 2023 that you wish to bring to the judges' attention (up to 250 words). Required

In 2023, Anusha Dwivedula led a foundational shift in Morningstar's Data & Analytics group by implementing a data mesh operating model—an evolution following the successful buildout of the firm's enterprise self-serve data platform.

This transition redefined how data was governed across domains, driving improved accountability, domain ownership, and data quality. As product lead for Calculation Services, she embedded best practices in data stewardship, lineage, and access control, enabling the delivery of trusted data across investment workflows.

In 2024, Anusha spearheaded a company-wide AI-driven observability initiative. Anchored by her proprietary "Trust Sandwich" framework, the system operationalizes responsible AI via infrastructure-level monitoring, anomaly detection, and human-in-the-loop validation.

This platform now underpins Morningstar's most critical IP assets:

- Morningstar Portfolio Risk Score (MPRS): Over 2 million scores recalculated monthly across flagship platforms.
- Medalist Rating: Coverage expanded to 400,000+ share classes
- Total Return Index: Modernized calculations across 800+ investments.

Her leadership reduced modernization timelines by 67%, increased regulatory resilience, and set a scalable foundation for AI trust in financial data systems.

Beyond Morningstar, Anusha is making a significant impact on the industry. She authored an IEEE paper on AI quality frameworks, with additional work accepted at IEEE AITest 2025. A recognized thought leader, she has spoken at over 10 events, including IEEE CAI, INFORMS Analytics Showcase, Chief AI Officer Summit, and Women Impact Tech. She was named INFORMS Chicago's "Professional of the Year 2024," recognized as a "Leader of Impact 2025" by Women Impact Tech, and accepted into the prestigious AI2030 Global Fellow Program

1 of 4

c. Explain why the achievements you have highlighted are unique or significant. If possible compare the achievements to the performance of other employees or to other workers in your industry and/or to the nominee's past performance (up to 250 words). Required

Anusha Dwivedula's achievements stand out not only for their scale and technical depth but also for their lasting organizational impact, delivered without a VP or executive title. Her work has redefined how Morningstar approaches data ownership, quality, and AI governance across its global data ecosystem.

The successful implementation of a data mesh operating model in 2023 is particularly noteworthy. While many firms struggle to translate data mesh principles into actionable change, Anusha operationalized it within a large, matrixed organization by embedding domain ownership, governance protocols, and self-serve tooling. This shift improved reliability and accountability across investment data streams—something few peers in similar roles have accomplished at scale.

In 2024, her leadership in building a responsible AI-powered observability platform set a new standard. Most organizations focus narrowly on anomaly detection or dashboards. Anusha went further, designing a full-stack observability model ("Trust Sandwich") that integrates technical infrastructure, AI, and human oversight. This directly accelerated modernization timelines by 67% and enabled scalable, explainable outputs for high-stakes calculations like MPRS and the Medalist Rating—capabilities often siloed in much larger AI teams.

Compared to peers, Anusha's blend of platform thinking, ethical AI, and industry impact is rare. Few professionals at her level have authored peer-reviewed research, spoken at IEEE summits, and simultaneously delivered enterprise-wide transformation. Even within Morningstar, her ability to bridge technical, operational, and regulatory priorities makes her one of the most influential non-executive leaders in the organization's data transformation journey.

d. Reference any attachments of supporting materials throughout this nomination and how they provide evidence of the claims you have made in this nomination (up to 250 words). Optional

The following supporting materials provide evidence of Anusha Dwivedula's contributions, external recognition, and industry leadership:

Peer-Reviewed IEEE Paper (Published):

Anusha's paper, *Establishing Trust in AI-Driven Data Observability and Quality Control*, introduces the "Trust Sandwich" framework and Data Trust Score now embedded in Morningstar's data pipelines. It aligns with ISO/IEC 25012, NIST RMF, and IEEE P7003, highlighting her authority in responsible AI and data quality.

Accepted Paper – IEEE AITest 2025:

Her second paper, A Multi-Layer Framework for AI-Driven Quality Control in Large-Scale Data Production, was accepted at IEEE AITest 2025 as a regular research paper—one of only 22 selected from 79 submissions (31.6% acceptance rate). The paper selection underscores the technical rigor and industry relevance of her work.

Business Impact Metrics:

Internal documentation validates significant results: modernization cycles are shortened from six months to two, 2 M+ MPRS scores are recalculated monthly, and observability is scaled across 800 K+ investments, including the Medalist Rating and Total Return Index.

Thought Leadership:

Anusha has presented at IEEE CAI, Women Impact Tech, and the Chief AI Officer Summit, focusing on AI risk, observability, and governance.

Awards and Advisory Roles:

She was named INFORMS Chicago's "Professional of the Year 2024" and a 2025 "Leader of Impact" by Women Impact Tech. Anusha also serves on multiple advisory boards and was selected for the prestigious AI2030 Global Fellow Program.

Collectively, these materials demonstrate Anusha's sustained, high-impact contributions across technical innovation, business transformation, and industry thought leadership.

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