Morningstar Office^{SM} Cloud Release Notes December 5, 2018

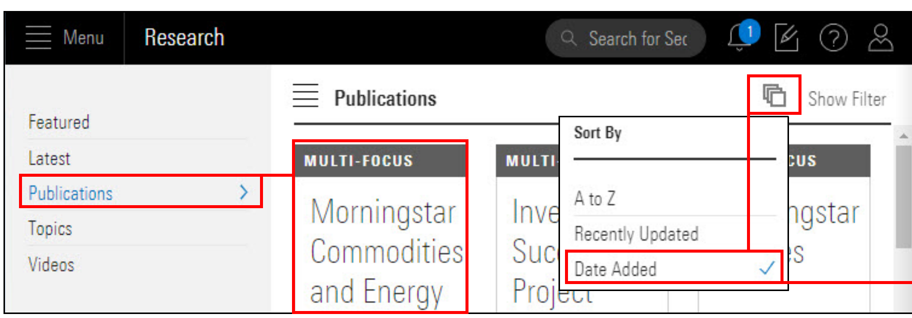
Overview

This document describes the new features and enhancements in Morningstar Office^{SM} Cloud, as follows:

- How can I access Morningstar Research on the Commodities and Energy markets? (page 1)
- How can I view information on regulatory filings? (page 2)
- What additional grouping options are available from the Allocation component? (page 2)
- How can I view the Morningstar Separately Managed Accounts Report for a fixed income security? (page 3)
- How can I analyze a model? (page 4)
- How can I search for clients and accounts in Billing? (page 4)

How can I access Morningstar Research on the Commodities and Energy markets?

In Morningstar Research, a new publication for Morningstar Commodities and Energy Markets offers articles from experts to help front office, risk managers, and analysts make better decisions in the North American power, gas, and oil markets.



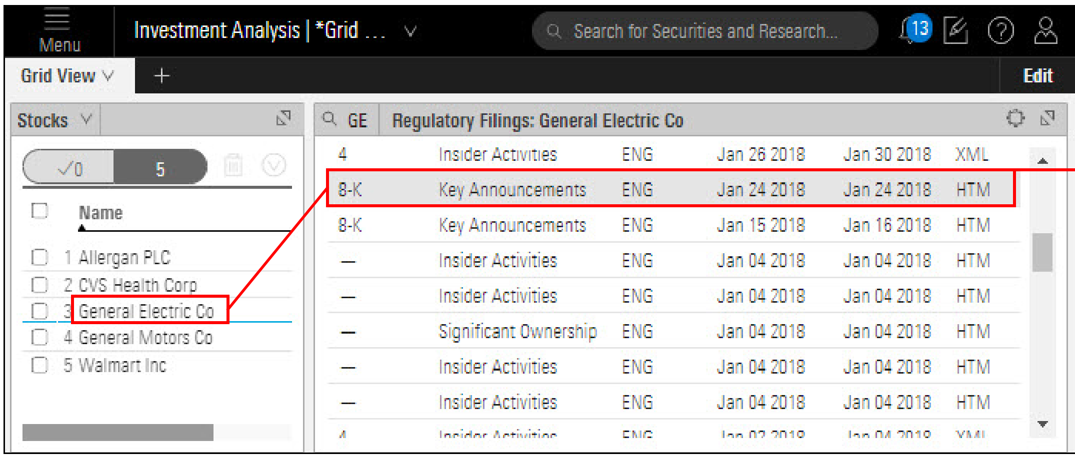
To move the newest publications to the top of the display, click the **Sort** icon and select **Date Added**.

How can I view information on regulatory filings?

A new Regulatory Filings component is available in all Investment workbooks, including Markets workbooks. The component lists the regulatory filings going back 15 years for the following fund and equity types:

- first generation of an integrated fund
- first generation of an equity, and
- first generation of an SMA (Separately Managed Account).

> Note: The Regulatory Filings component is not part of any pre-built worksheet; you must manually add it to a new or existing worksheet to see it.

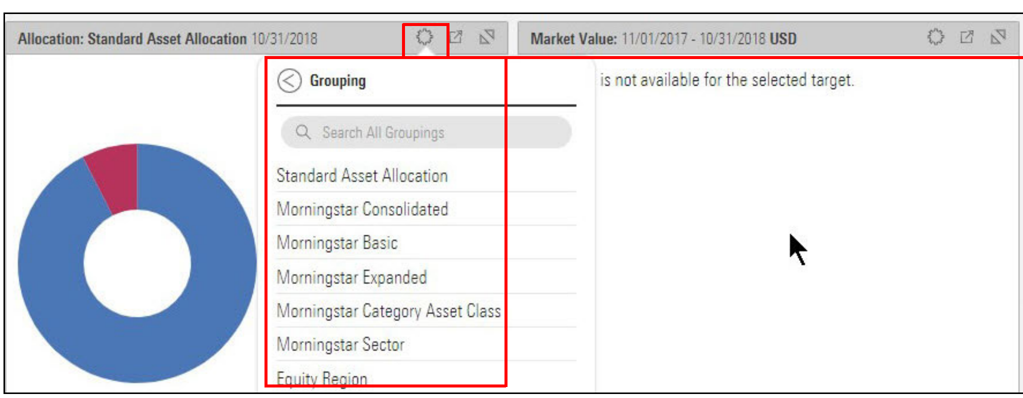


Click a filing to open it in a new browser window or tab.

What additional grouping options are available from the Allocation component?

Prior to this release, "Standard Asset Allocation" was the only grouping option offered when viewing in the Allocation component in a Clients & Accounts workbook. Now you can select from the following new grouping options:

- Morningstar Consolidated
- Morningstar Basic
- Morningstar Expanded
- Morningstar Category Asset Class
- Morningstar Sector, and
- Equity Region.

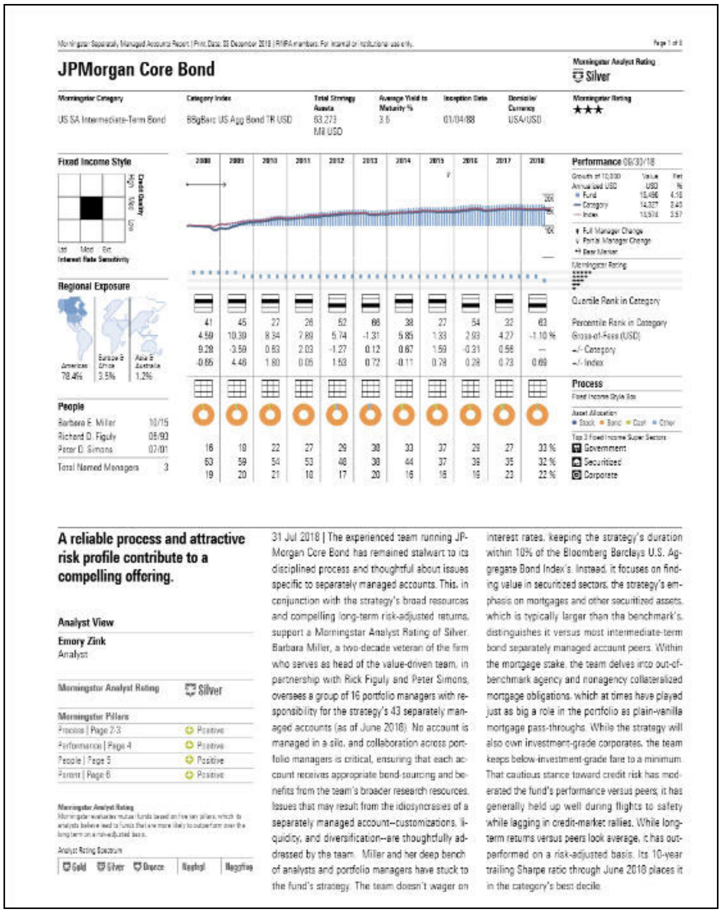


Click the **Component Settings** icon, select **Grouping**, then select **a grouping option**.

How can I view the Morningstar Separately Managed Accounts Report for a fixed income security?

The Morningstar Report for Separately Managed Accounts for a fixed-income security is now available. The report can be accessed from the Morningstar Research component.

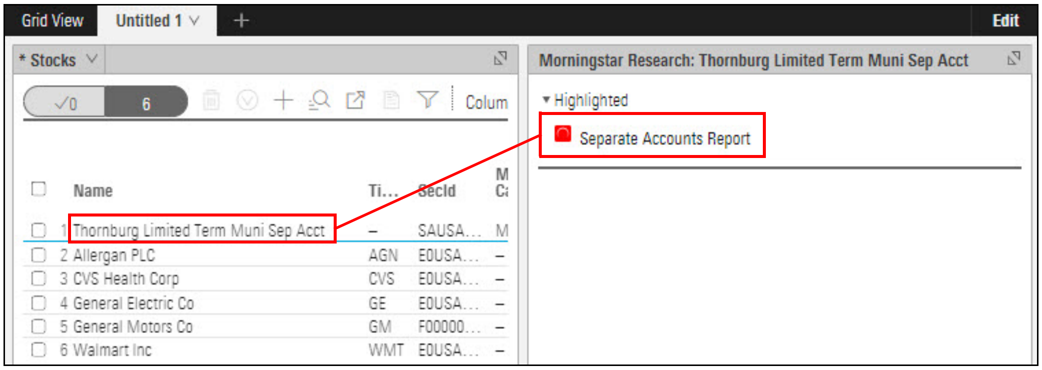
☞ Note: The Global Fund Report is available only for those SMA Fixed Income funds covered by a Morningstar Analyst. Look for a value (Gold, Silver, Bronze, or Neutral) in the Morningstar Analyst Rating column in the Grid View component to find these funds.



A sample of the new Morningstar Report for fixed-income separately managed accounts.

In a workbook, do the following:

1. Select a **Morningstar-covered SMA Fixed Income security**.
2. At the top of the component, click **Separate Accounts Report**. The report opens in the component area as a printable, downloadable PDF.



Note the highlighted selections.

How can I analyze a model?

With the new Model workbook, you can analyze your models using customizable workbooks and components.

To learn more about the Model workbook, please read Creating Custom Benchmarks and Model Portfolios in Morningstar Office[SM] Cloud.

How can I search for clients and accounts in Billing?

You can now search for clients and accounts by name directly from the Billing current page.