

We are pleased to offer Direct training sessions for our international users. These training sessions are a great opportunity to develop new skills and increase proficiency with the Direct platform. Training sessions are divided into three groups according to content: Getting Started, Workspace, and Applications.

<b>Getting Started</b>	<p><b>Basic Overview: Learn Navigation and Functionality</b></p> <p>This session will cover basic navigation to jump start your process: user preferences, investment lists, search criteria, data sets &amp; calculations, and charts &amp; reports. For individual sessions, see class listing under Getting Started.</p>	<p><a href="#">View dates</a> <a href="#">&amp; register</a></p>
	<p><b>General Overview: Learn the Basics and Apply to Various Applications</b></p> <p>Learn Morningstar Direct's basic navigation and functionality to benefit from the many resources and applications. This comprehensive session will cover various features ranging from search criteria, investment lists, chart and reports to various applications such as presentation studio, performance attribution, performance reporting, fund flows, and more.</p>	<p><a href="#">View dates</a> <a href="#">&amp; register</a></p>
<b>Workspace</b>	<p><b>Aggregates: Build Blended Portfolios &amp; Benchmarks</b></p> <p>Learn how to define the allocations among investments or indexes. Leverage Morningstar Direct to analyze the results and display them in reports or charts.</p>	<p><a href="#">View dates</a> <a href="#">&amp; register</a></p>
	<p><b>Microsoft Excel Plug-In: Simply Access Historical Data Series Directly from Excel</b></p> <p>Discover how to use the Plug-In for Microsoft Excel. Experiment with various templates to link historical time series data to a search or investment list created in Morningstar Direct.</p>	<p><a href="#">View dates</a> <a href="#">&amp; register</a></p>
<b>Applications</b>	<p><b>Performance Attribution: Identify Excess Return Based on Investment Decisions</b></p> <p>Learn the basics to performance attribution. This session will mainly cover the navigation, functionality, interpretation of results, as well as batch scheduling, Adobe® PDF®, and importing of position accounts for daily attribution.</p>	<p><a href="#">View dates</a> <a href="#">&amp; register</a></p>
	<p><b>Performance Reporting: Streamline &amp; Automate Production</b></p> <p>Examine how Morningstar Direct's performance reporting streamlines your reporting process, from selecting peer groups to specifying performance time periods and customizing benchmarks.</p>	<p><a href="#">View dates</a> <a href="#">&amp; register</a></p>
	<p><b>Total Portfolio Attribution: Identify Excess Return Based on Asset Allocation &amp; Manager Selection</b></p> <p>Learn about Total Portfolio Attribution to analyze the decision maker's contribution to performance in the selection of investment managers and allocation of assets to each manager versus the strategic asset allocation policy. This session will cover both navigation and methodology.</p>	<p><a href="#">View dates</a> <a href="#">&amp; register</a></p>

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**Fund Flows: Gain Competitive Intelligence**

Learn to monitor current fund flow and market share data, gaining competitive intelligence information about the asset management industry. This session will cover the key benefits and how Morningstar Direct distinguishes its offerings from competitors.

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**Investment Scorecard: Apply Custom Grades to Screen Results**

Learn how to assign weights and grades to different quantitative factors in order to calculate custom scores.

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**Presentation Studio: Develop Custom Workbooks**

Discover the new Presentation Studio to create reusable templates for entirely customizable presentations, reports, and fact sheets that reflect your company branding. In this session, you will learn to create quick workbooks using Morningstar templates and to create custom workbooks using the various chart and table choices.

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For North American training times, please visit your Morningstar Direct platform:

- ▶ Select "Home"
- ▶ Select the "Training" folder
- ▶ Select "Online Classes"