MORNINGSTAR®

We are pleased to offer EnCorr training sessions for our International users. These training sessions are a great opportunity to develop new skills and increase proficiency with the EnCorr platform. Some courses are offered in both North American and European time zones for your convenience.

Training sessions are divided into three groups according to content: Recent Enhancements, New User and Featured Topic.

Recent Enhancements	Discovering New Enhancements in Morningstar EnCorr 9.5 Find out what new enhancements are available in Morningstar EnCorr 9.5. This session will cover new functionality features, new allocator methodology, and additional data points.	View dates & register (North America) View dates & register (Europe)
New User	Using EnCorr's Analyzer to Perform Historical Analysis Learn to perform in-dept analyses on historical capital markets data, benchmarks, various investments, and custom portfolios. Evaluate performance and statistical measures while using EnCorr's inflation-adjusted returns, graphing functions, and statistical customizations.	View dates & register (Europe)
	Using EnCorr's Attribution to Perform Returns-Based Style Analysis Learn to evaluate the style consistency of multiple managers, as well as the performance of custom and predefined peer groups using EnCorr's Attribution tool.	View dates & register (North America)
	Using the Drawdown Tools to Determine Downturn and Recoveries Learn how to utilize EnCorr's drawdown statistics and condition feature to evaluate market downturns and recoveries.	View dates & register (North America)
	Using Forecasts and Simulations to Understand Results Learn to build return and wealth percentile tables and charts using the forecasts and Monte Carlo simulations.	View dates & register (North America)
	Using EnCorr's Inputs Generator to Develop Asset Class Assumptions Develop and test asset class assumptions by using EnCorr's input methodologies to build expected return estimates. Gain a better understanding of the impact of your input methodology choices, as well as of the meaning behind the results.	View dates & register (North America)
	Using Surplus Optimization to Account for Liabilities Discover true portfolio risk when applying liability-based approaches to asset allocations with EnCorr. Typically used within a defined pension context when there's a legal liability, these approaches are relevant for everyone with a portfolio of assets that exists to fund a liability.	View dates & register (North America)

	Using Resampling to Run Optimization Gain a deeper understanding of EnCorr's resampling methodology, which applies simulated returns to the optimization process. Learn the differences between traditional mean-variance optimization and resampled optimization.	View dates & register (North America)
	Using EnCorr's Scenario Builder to Create "What-If Scenarios" Learn how to build "what-if" scenarios in EnCorr to determine how well existing investments and new recommendations would perform in various market and economic conditions.	View dates & register (North America)
	Understanding Ibbotson's Building Blocks and Black-Litterman Input Methodologies Learn to identify which input methodology in EnCorr is most appropriate for optimizing your portfolios. Discover the Ibbotson Building Blocks and Black-Litterman methodologies through a step-by-step analysis of their elements.	View dates & register (North America)
Featured Topic	End to End Case Study to Benefit from all the EnCorr Modules Learn to use EnCorr's full suite of tools to research, build, implement, and evaluate asset allocation recommendations.	View dates & register (North America) View dates & register (Europe)

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