Enhancements in Morningstar Direct℠ Plug-in for Microsoft® Excel®

**Mar 10 Release	Ver 3.8**	▶ New templates:
	▶ High/Low/Closing Prices ▶ Daily Yield
	▶ Historical Active Share
Dec 09 Update	▶ New template:
	▶ Top Holdings template extracts up to 30 holdings for up to 50 portfolios
	▶ Rescaling applied as a step in calculation for the Active Share template
	▶ Extract bid prices in Price templates on days when NAVs are unavailable
	▶ Added qualitative rating data points to Rating template
Nov 09 Update	▶ New templates:
	▶ Active Share ▶ Price + Dividend
**Sep 09 Release	Ver 3.7**	▶ Launch Morningstar plug-in for Microsoft® Excel® from left navigational panel under Home in Morningstar Direct
	▶ Save selected investments to the template when you save the template
Jul 09 Update	▶ New templates:
	▶ Bid/Offer Calendar Period Return for Funds ▶ Transaction Exit/Entry Price for Australia Funds
	▶ Bid/Offer Trailing Period Return for Funds ▶ NAV + Cap Gain + Dividend for Funds
	▶ Bid/Offer Rolling Period Return for Funds
Jun 09 Update	▶ New templates:
	▶ Post-Tax NAV for Italy funds ▶ Bid/Offer Price for Funds in UK, Germany, India, Hong Kong, Singapore, Mexico, Denmark
Apr 09 Update	▶ Set List to user-define Aggregates from Morningstar Direct
	▶ Manually select investments from all plug-in templates
	▶ New templates:
	▶ Returns-based Style Analysis ▶ Trailing Gross Return
	▶ Premium/Discount ▶ Capital Gain
	▶ Morningstar Rating History ▶ Rolling Risk
	▶ 7 Day Yield ▶ Rolling Relative Risk (Single Benchmark)
	▶ Trailing Return ▶ Rolling Relative Risk (Multiple Benchmarks)
	▶ Trailing Market Return
Nov 08 Update	▶ New templates:
	▶ Correlation Matrix ▶ Rolling Market Return
	▶ Rolling Return ▶ Rolling Gross Return

► Introduce Morningstar plug-in for Microsoft® Excel®

  ► Easy-to-use templates automatically pull historical time series data into spreadsheets for tasks such as developing and backtesting custom models, or for conducting peer and trend analyses

  ► Gives users freedom to develop custom calculations and adjust frequency, time period, and currency in analyses

  ► Links with Excel's features to transpose rows and columns and create charts, print ranges, and pivot tables

► Templates:

  ► Growth Index

  ► Rating

  ► Morningstar Category Daily Return Index

  ► Return Index

  ► Dividend

  ► Currency Exchange Rates

  ► Calendar Return

  ► Calendar Market Return

  ► Calendar Gross Return