MORNINGSTAR®

Enhancements in Morningstar Direct℠ Presentation Studio

Mar 10 Release | Ver 3.8

▶ New components:
  ▶ Holdings-based attribution components
  ▶ Multi-manager attribution comparison (4 components)
  ▶ Single manager attribution (6 components)
  ▶ Portfolio holdings table

  ▶ Correlation matrix
  ▶ Separate account narratives
  ▶ Notes and dynamic text
  ▶ Rich text format text components
  ▶ Investment Strategy and Manager Biography text

▶ Select portrait or landscape page layout
▶ New workflow for fact sheet creation
▶ Export to PDF, PPT or XPS
▶ Enhance portfolio date selection options
▶ Select custom colors using RGB codes
▶ Improve font sizing in tables
▶ Organize saved files and templates into folders
▶ Share templates with other Authorize Users

Dec 09 Update

▶ New charts added:
  ▶ Peer group floating bar chart
  ▶ Time series chart

  ▶ Rolling returns chart

▶ Peer group data (ranks, breakpoints, summary statistics) in data table components
▶ Display user-defined portfolios (Aggregates and Position Accounts)
▶ Deferred calculations for peer group charts and tables
▶ Include both Net and Gross returns for separate account data
▶ Use "Send to" option to send workbooks to other Morningstar Direct users
▶ Additional header and footer options
▶ Unlimited time period columns for bar charts and multiple time period tables
▶ Define custom color palette using a configuration file
▶ Include user-defined data files in tables

Sep 09 Release | Ver 3.7

▶ Introduce Presentation Studio to create reusable templates for entirely customizable presentations, reports, and fact sheets reflecting company branding
▶ Easily incorporate charts, data tables, images, and text for selected investments and benchmarks
▶ Use pre-defined templates or customize layouts by dragging and dropping components
▶ Interactive interface for presentation design allows instantaneous data update of charts and tables
▶ Configure page-formatting options including header, footer, page backgrounds, page numbers, fonts, etc.
▶ Available Morningstar templates:
  ▶ Competitor Analysis – Equity Managers
  ▶ Competitor Analysis – Fixed Income Managers
  ▶ Competitor Analysis – Separate Account Managers
  ▶ Equity Manager Fact Sheet
  ▶ Fixed Income Manager Fact Sheet
  ▶ Separate Account Manager Fact Sheet

► Available charts with data tables:

  ► Investment Growth

  ► Risk-Reward

  ► XY Scatterplot

  ► Trailing Returns

  ► Calendar Returns

  ► Holdings-Based Style

  ► Returns-Based Style

► Launch Presentation Studio from new module found on the left navigation panel

► *Note*: Platform requirements for best performance are 2 GB of memory and Windows XP operating system and newer. Microsoft Windows Installer 3.0 is required.