

Enhancements in Morningstar DirectSM Reports & Charts

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- Mar 10 Release | Ver 3.8
- ▶ Include disclosures for Fund vs. Fund report
 - ▶ Added Yearly Estimated Net Flow to Historical Cash Flow Data
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- Sep 09 Release | Ver 3.7
- ▶ Introduce Presentation Studio to create reusable templates for entirely customizable presentations, reports, and fact sheets reflecting company branding (*see Presentation Studio for details*)
 - ▶ New Target Date Series reports
 - ▶ New Return Bar chart displays side-by-side annual and trailing returns vs. benchmark
 - ▶ New Rolling Return Line chart displays rolling returns for multiple investments
 - ▶ Data table included below Growth, Price, Rolling Return Line, Return Bar, Risk/Reward, and Return vs. Category charts
 - ▶ Enhance Growth chart improves speed and responsiveness, displays different return types including market, total, and gross, for the entire chart or for individual investments
 - ▶ Improve format for Return vs. Category chart with option to select peer group and display annual or trailing returns
 - ▶ Show correlation in bull/bear markets in Returns Correlation matrix
 - ▶ Easily add common benchmark types without looking up the benchmark using the Add Benchmark feature
 - ▶ Use symbols to represent investments, and select a benchmark for the crosshairs in the Risk/Return chart
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- Mar 09 Release | Ver 3.6.1
- ▶ Report Builder
 - ▶ Home page for Report Builder
 - ▶ Added Performance Summary as a new report template
 - ▶ Select new operations, performance, risk, portfolio, and Morningstar Ratings and analysis components for inclusion in custom reports
 - ▶ Select up to four investments to compare against a benchmark in the Multiple Investment Comparison report
 - ▶ Add Morningstar Rating™ for hedge funds to the Hedge Fund Summary report
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- Dec 08 Release | Ver 3.6
- ▶ Report Builder
 - ▶ Notes component adds most recent user-written notes on investment
 - ▶ Send and share customized components
 - ▶ Click PDF button in Report Builder to generate report
 - ▶ Institutional ownership report
 - ▶ Ownership Activity to identify which institutions have new, sold-out of, increased, or decreased selected investment positions
 - ▶ Ownership Statistics to analyze market cap and country breakdowns of each institutional owner
 - ▶ Generate HTML or PDF report
 - ▶ Quicktake reports
 - ▶ Fair value analysis for ETFs displays valuation rating, fair value prices and returns, portfolio fair value uncertainty with underlying security breakdowns, moat breakdowns, % of assets with fair market value, and # of holdings covered
 - ▶ Morningstar Style Box™ for fixed income funds
 - ▶ Gross return for Canada pooled funds
 - ▶ Select Morningstar Category in Performance Evaluation report dialog to dynamically populate investment peer groups
 - ▶ Choose standardized returns disclosure page and general disclosures separately in reports dialog

Oct 08 Release | Ver 3.5

- ▶ Report Builder
 - ▶ Launch Report Builder from Report Templates under Workspace
 - ▶ Added Templates to quickly access your saved templates
 - ▶ More customizable options for Text Box
 - ▶ Improved speed when loading custom components and generating reports
 - ▶ Expand/collapse all levels in Component Library by double-clicking on section heading
- ▶ Generate up to 100 Quicktake PDF reports at one time
- ▶ Increase simultaneous report processing limit from 15 to 30 investments
- ▶ Find popular Quicktake reports with new search suggestions
- ▶ Quicktake reports on market indexes with information on classifications, operations, and performance
- ▶ Expand Fund vs Fund report to include ETF, closed-end funds, and international funds
- ▶ Add six new benchmark sets for returns-based style analysis report and returns-based style trail chart

May 08 Release | Ver 3.4

- ▶ Logo/image component in Report Builder now accessible from any location
- ▶ New peer group options available in Floating Bar and Scatterplot charts and Performance Evaluation report: GIF Sector, AIC Sector, IMA Sector, ABI Life Sector, ABI Pension Sector, Categoria Inverco, Categoria Assogestioni
- ▶ Option for a non-log scale in the growth chart
- ▶ Dynamic benchmark selection for reports, including MPT statistics against category benchmark and specified prospectus benchmark
- ▶ Generate up to 15 Rating Analysis reports in a batch