Morningstar® Direct℠ Classroom Training

Thursday, October 25, 2012

MicroTek, 333 Bush St., Suite 1200, San Francisco, CA

Morningstar Direct hands-on training will help you realize the full benefits of the platform's powerful capabilities and sophisticated functionality. Whether you're interested in in-depth research, analytics, or publishing tools, we will provide solutions to meet your individual needs. The morning session is designed for beginners, focusing on basic navigation and functionality. The afternoon session is most appropriate for intermediate to advanced users, focusing on in-depth analytical tools. Registrants may select either the morning or afternoon session or may register for both.

Reasons you should attend:
Learn the best practices to analyze various types of investments
Learn about tips and tricks to make your workflow more efficient
Uncover in-depth analytical tools to bring more rigor to your research and analysis
Learn to communicate your results with reporting and presentations tools

8:30 to 9:00 am	**Registration**
9:00 to 12:00 pm	**Morning Program for Beginners**

This session will cover basic navigation and functionality to help you jump-start your process.

► Investments Lists & Search Criteria
► Data Sets & Custom Calculations
► Reports & Charts
► Model Portfolios & Imports

12:00 to 1:00 pm	**Working Lunch (**Excel API)
1:00 to 4:30 pm	**Afternoon Program for Intermediate and Advanced Users**

This session will cover work flow scenarios to apply various analytics for in-depth analysis.

► Performance Reporting & Scorecard
► Equity Attribution & Real Time Portfolio Analysis
► Presentation Studio
► Asset Flows

► *With time remaining, Asset Allocation & Total Portfolio Attribution will be covered.*