
Morningstar EnCorr

Using EnCorr's Scenario Builder Tool to Create
"What-If Scenarios"

EnCorr Modules

Analyzer



Explore historical and current investment data

Inputs Generator



Develop, refine, and test asset class assumptions

Optimizer Plus



Build and analyze portfolios along the efficient frontier

Attribution



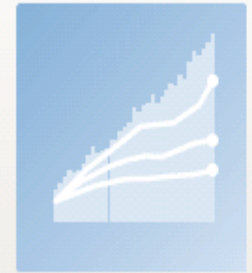
Examine manager style consistency and investment decisions

Allocator



Determine manager mix to implement asset allocation plan

Scenario Builder



Perform "what if" analyses under multiple conditions

Overview

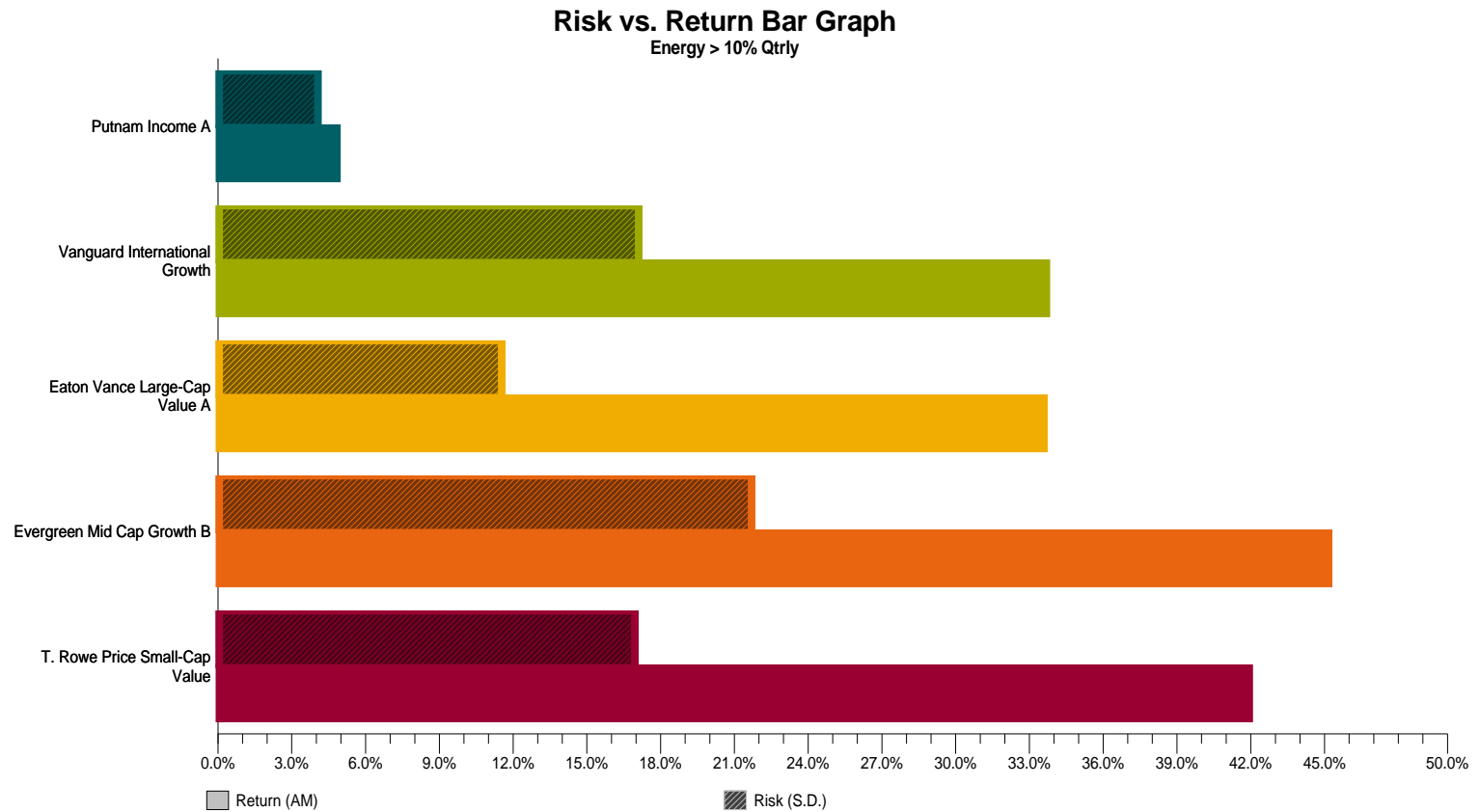
- ▶ Description:
 - ▶ EnCorr Scenario Builder enables you to perform “what-if” scenarios under multiple conditions.
- ▶ Sample Scenarios
 - ▶ January effect on small cap stocks
 - ▶ 4th quarter effect on technology stocks
 - ▶ Yield curve effect on the stock and bond markets
 - ▶ Inflation effect on markets and investments
 - ▶ Value and growth style effect on investments
 - ▶ Presidential effect on the stock and bond markets

Navigation

- ▶ Selecting your series
 - ▶ Basis Series Tab
 - Select your data series that define various market or economic conditions
 - ▶ Analysis series
 - Select data series for whose returns you would like to create scenarios and analyze

Output

▶ Excel, Powerpoint, Word



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