Morningstar Direct^{SM} Cloud Editions Release Notes December 5, 2018

This document describes the new features and enhancements in the Morningstar Direct^{SM} Cloud Editions, as follows:

Overview

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How can I access Morningstar Research on the Commodities
and Energy markets?

In Morningstar Research, a new publication for Morningstar Commodities and Energy
Markets offers articles from experts to help front office, risk managers, and analysts
make better decisions in the North American power, gas, and oil markets.

**How can I access
Morningstar Research
on the Commodities
and Energy markets?**
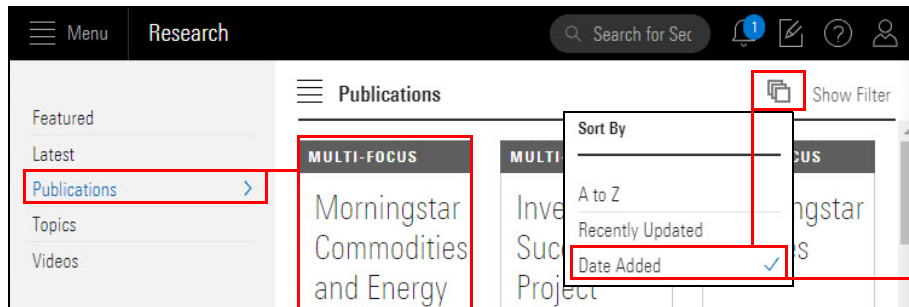
To move the newest
publications to the top
of the display, click the
Sort icon and select
Date Added.

A new Regulatory Filings component is available in all Investment workbooks,
including Markets workbooks. The component lists the regulatory filings going back 15
years for the following fund and equity types:

**How can I view
information on
regulatory filings?**

▶ first generation of an integrated fund
▶ first generation of an equity, and
▶ first generation of an SMA (Separately Managed Account).

☞ Note: The Regulatory Filings component is not part of any pre-built worksheet; you must
manually add it to a new or existing worksheet to see it.
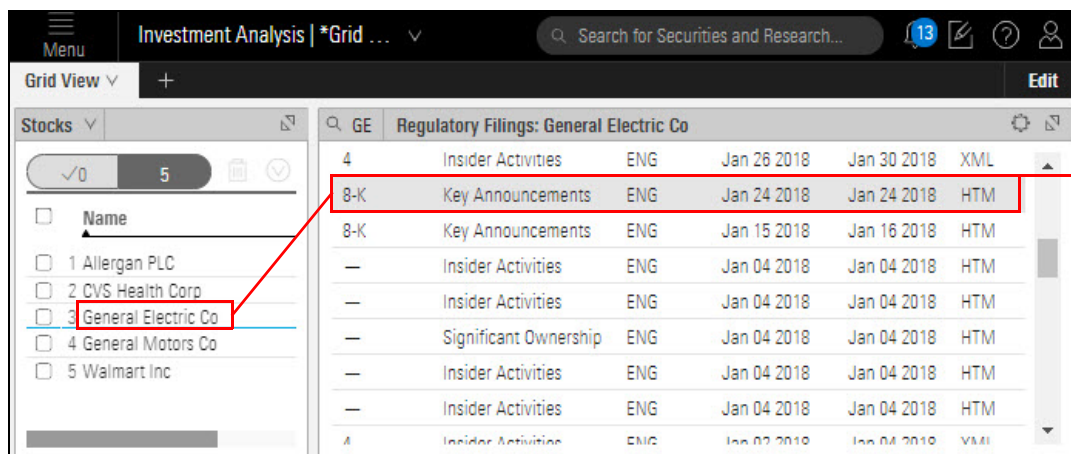
Click a filing to
open it in a new
browser window
or tab.

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How can I view the Morningstar Separately Managed Accounts Report
for a fixed income security?

The Morningstar Report for Separately Managed Accounts for a fixed-income security is now available. The report can be accessed from the Morningstar Research component.

☞ Note: The Global Fund Report is available only for those SMA Fixed Income funds covered by a Morningstar Analyst. Look for a value (Gold, Silver, Bronze, or Neutral) in the Morningstar Analyst Rating column in the Grid View component to find these funds.

How can I view the Morningstar Separately Managed Accounts Report for a fixed income security?

A sample of the new Morningstar Report for fixed-income separately managed accounts.

In a workbook, do the following:

1. Select a **Morningstar-covered SMA Fixed Income security**.

2. At the top of the component, click **Separate Accounts Report**. The report opens in the component area as a printable, downloadable PDF.
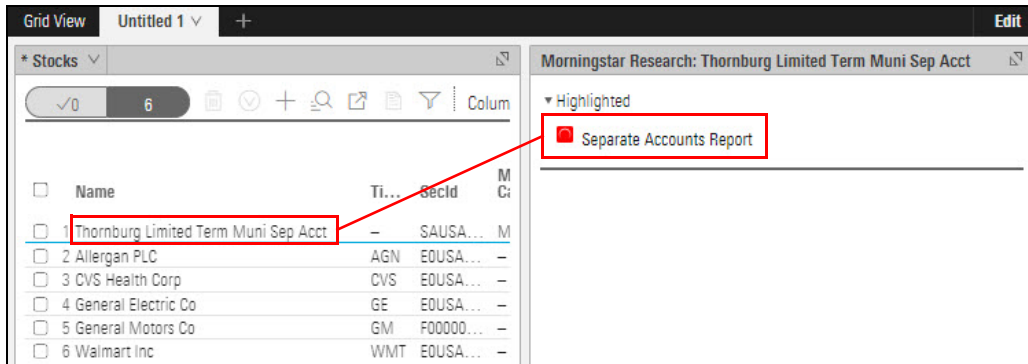
Note the highlighted selections.

You can now view fund-level regional and country data in an Equity Fund workbook by using the following new components:

► Global Revenue Map, and
► Revenue Exposure.

☞   Note: Both components are found in the Allocation section of the Component Library. A fund must have at least 20% of its assets in equities in order for the components to populate.

How can I access regional and country revenue data at the fund level?

The Global Revenue Map component can be displayed as a map (default) or a grid, as well as by region (default) or country.

The Revenue Exposure component can be displayed as a table (default) or a chart.
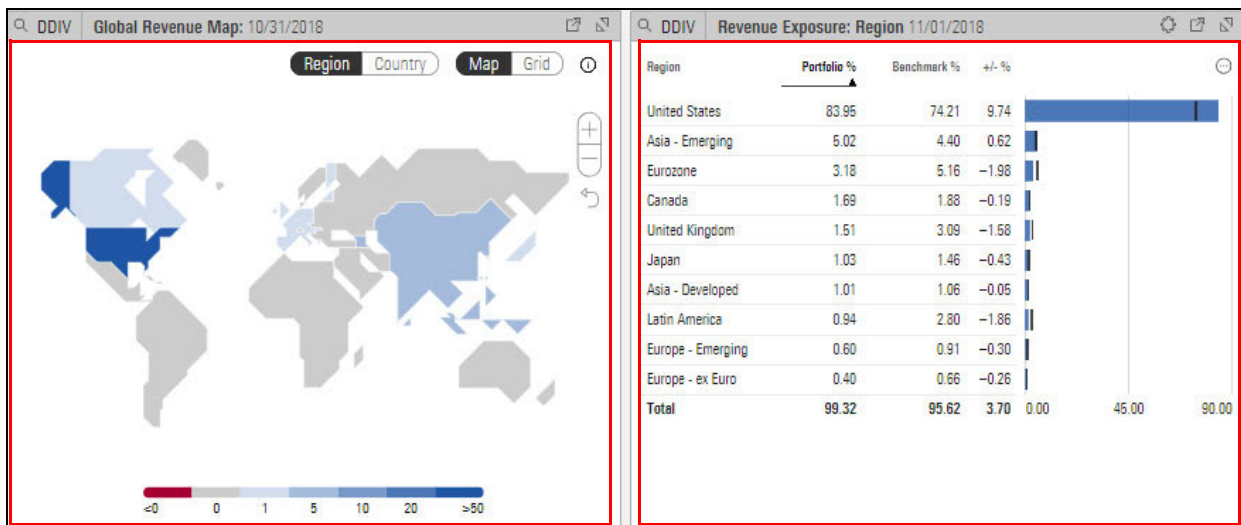
If you are licensed to access Systainalytics company-level ESG data, the data points Company Normalized ESG Score and Company Highest Controversy Level are available as follows:

How can I view company-level ESG data?

- ▸ In the Holdings Analysis component (covered in this section)
- ▸ when creating a new model portfolio or client account, or
- ▸ when editing holdings for an existing model portfolio or client account.

Company-level ESG data is available for equities only.

To display the company-level ESG data points in the Holdings Analysis component, do the following:

1. In a Model Portfolio or Client Accounts workbook, select the **Holdings** worksheet. The Holdings Analysis component is displayed.

2. In the Grid component, select a **model portfolio** or **client account** containing individual equities.

3. In the Holdings Analysis component, click the **Component Settings** icon, then select **Column Set** > **Sustainability**.

4. **Scroll right** to see the Company Normalized ESG Score and Company Highest Controversy Level columns.

The company-level ESG data is located at the far-right in the Sustainability column set.

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How can I broadcast a household's account-level data to other
components in a Client Accounts workbook?

A household (or grouping) represents several underlying client accounts and it can use the weighted average of those accounts to show its own statistics. For instance, in a household with three client accounts, each account has its own asset-allocation breakdown; the breakdown of the household is the weighted average of all three account breakdowns.

In a Client Accounts workbook, when a household is the focus, the household's account-level data is available in the following components:

▶ Allocation   ▶ Holdings Plot

▶ Equity Region Exposure ▶ Investment Growth

▶ Historical Allocation   ▶ Market Value

▶ Historical Return   ▶ Return and Risk Scatterplot

▶ Holdings Analysis   ▶ Rolling Return

▶ Holdings Plot   ▶ Style Box

For more information, please read Working with Client Accounts.

How can I broadcast a household's account-level data to other components in a Client Accounts workbook?

When you enable client account grouping via the Peer Analytics panel, you can now see the aggregated client account household-level data for each group.
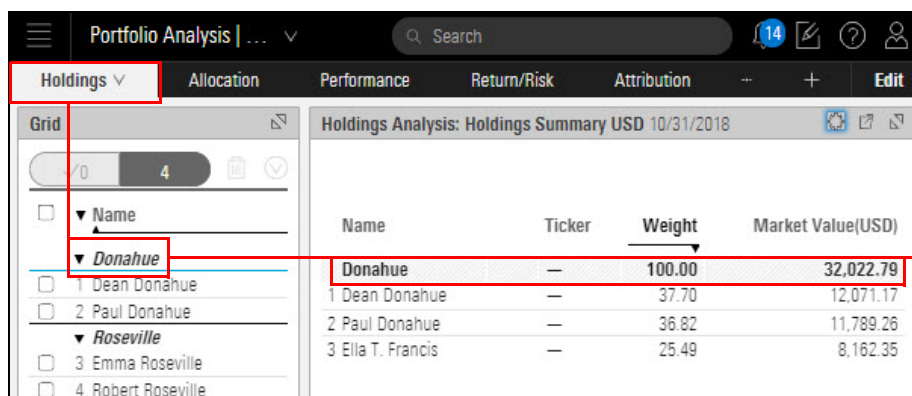
How can I view household-level data in a component?

Here you see the group-level Holdings Analysis for the selected group (Donahue).

For more information, please read Working with Client Accounts.

When conducting TPA, if you attached an investment policy to a portfolio, the attached policy is automatically used as the default policy in the Total Portfolio Attribution component. You no longer need to manually make this selection from the Component Settings menu in the Total Portfolio Attribution component.

For more information, please read Creating Model Portfolios, Custom Benchmarks, and Investment Policies.

What has changed in conducting Total Portfolio Analysis (TPA)?

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What determines the benchmarks and policy used when comparing two
model portfolios?

If you attached a model portfolio to another model portfolio, the associated model portfolio's benchmarks and policy are automatically used when generating a comparison report.

For more information, please read Creating Model Portfolios, Custom Benchmarks, and Investment Policies.

What determines the benchmarks and policy used when comparing two model portfolios?

In a Client Accounts workbook, you can now attach additional objects (such as client accounts, model portfolios, and proposals) to use as comparison benchmarks.

This feature is now available in the following components:

▶ Allocation   ▶ Scatter Plot

▶ Equity Style Box   ▶ Scenario Metrics

▶ Historical Return   ▶ Scenario Trend

▶ Historical Risk Exposure ▶ Sustainability Ratings Analysis

▶ Investment Growth

How can I compare data among client accounts, model portfolios, and proposals?
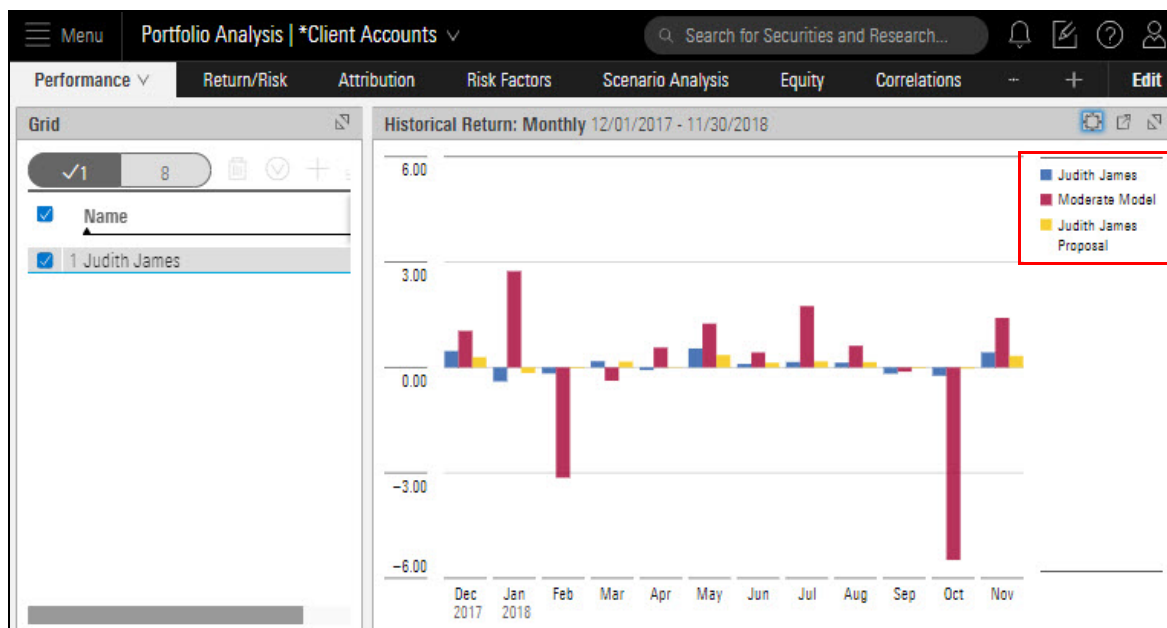
IFor more information, please read Working with Client Accounts.

After creating a proposal for a client account, you can now specify or update the proposal's calculation settings, just as you would for a client account itself.

How can I specify the calculation settings for a proposal?

The Action icon for an account allows you update the settings for a proposal.

For more information, please read Working with Client Accounts.

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In Presentation Studio, how can I add a footer to a template?

When building a Presentation Studio template, you can now add a footer.

In Presentation Studio, how can I add a footer to a template?
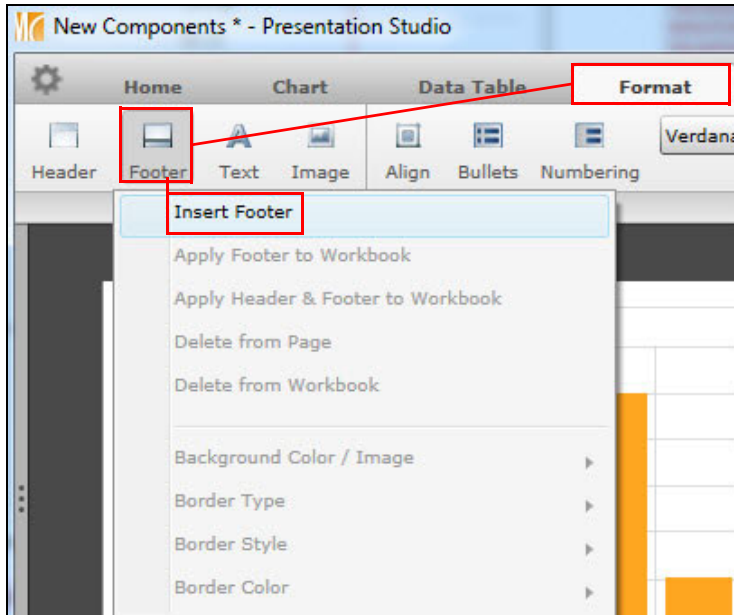
Note the highlighted selections.

Dynamic text can now be used in the header and footer of a Presentation Studio template.
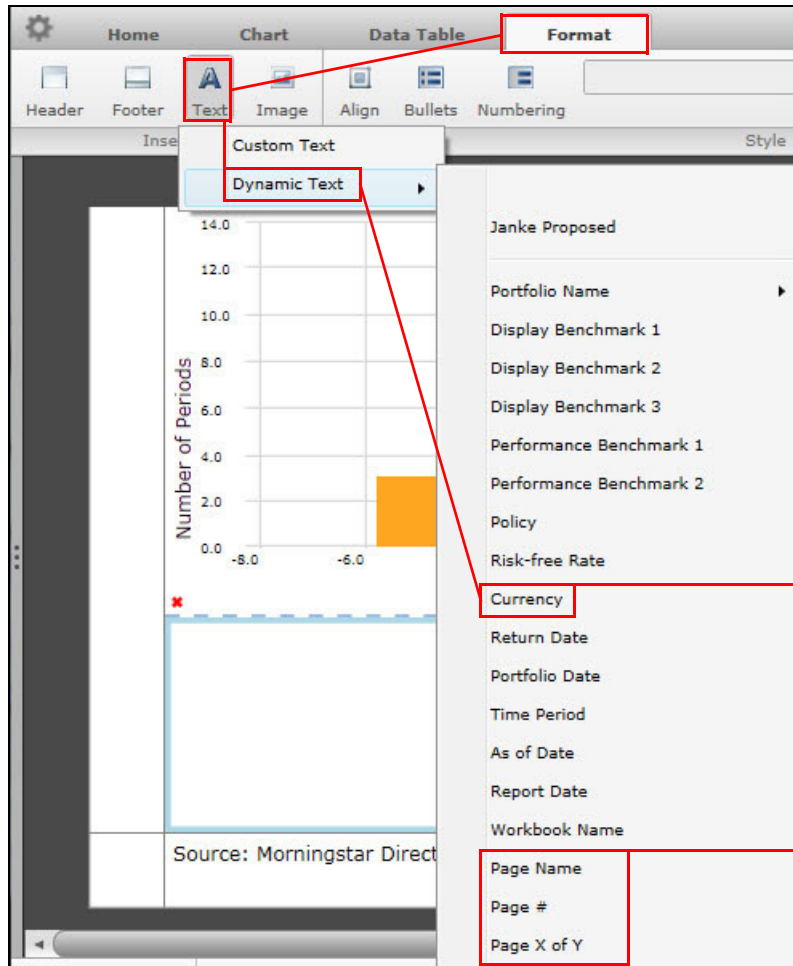
When a template with dynamic text is used to generate a report, dynamic text is displayed as the corresponding information for the report. For instance, if the dynamic text Currency is used in the template, the currency used in the report is displayed in its place.

In a template with multiple pages, it is recommended that you use at least one of these.

When building or modifying a Portfolio template, you can add placeholder text. When using the template to generate a report, the placeholders can be replaced with text specific to that report (for example, the client name or the advisor who prepared the report).

In Presentation Studio, how can I create and use placeholder text?

The placeholders are as follows:

- ▸ Client Name
- ▸ Client ID
- ▸ Client Company
- ▸ Advisor Name

- ▸ Advisor Phone
- ▸ Advisor Email
- ▸ Advisor Address
- ▸ Wholesaler Name

- ▸ Wholesales Phone
- ▸ Wholesaler Email
- ▸ Wholesaler Address
- ▸ User Defined Field.
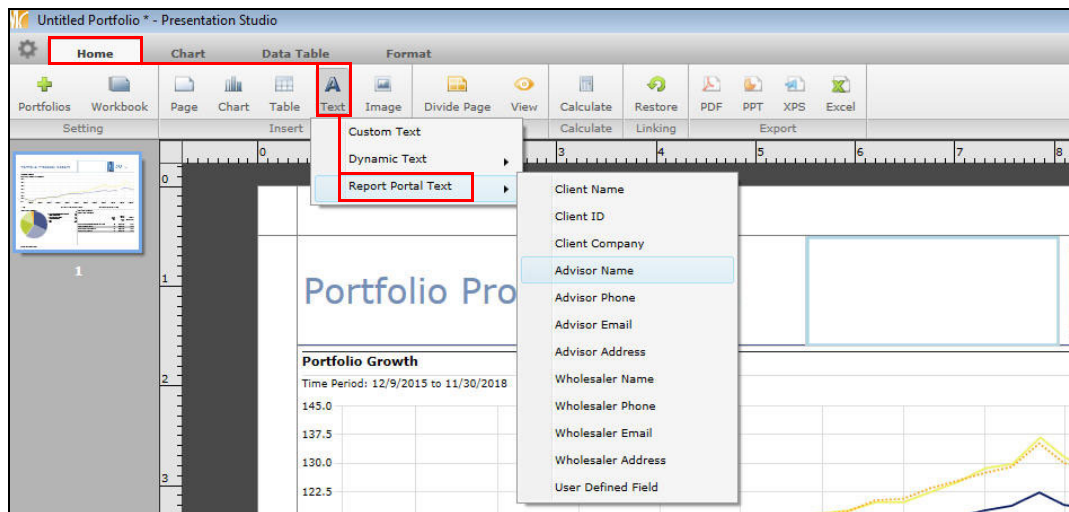
The Text icon is also available on the Format tab.

If you add placeholders to an existing Portfolio template, you must re-save it as a template and re-publish it to yourself to make the newest version available for reports.

When a template with placeholders is used to generate a report, the placeholder names are listed in the Report Specifications window. Enter the text to replace each placeholder. Your text appears in the generated report where the placeholders were.

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In Presentation Studio, how can I assign a calculation benchmark
to a component?

Depending on the data point to be calculated and context, you might want to use one calculation benchmark for certain calculations but a different benchmark for others.

You can now specify a calculation benchmark to use in a performance component; however, the available options are limited to the objects assigned to the model portfolio (or client account) you're reporting on. You can assign any or all of the following:

▶ Performance Benchmark 1
▶ Performance Benchmark 2, and
▶ a policy.

In Presentation Studio, how can I assign a calculation benchmark to a component?

Note the highlighted selections.
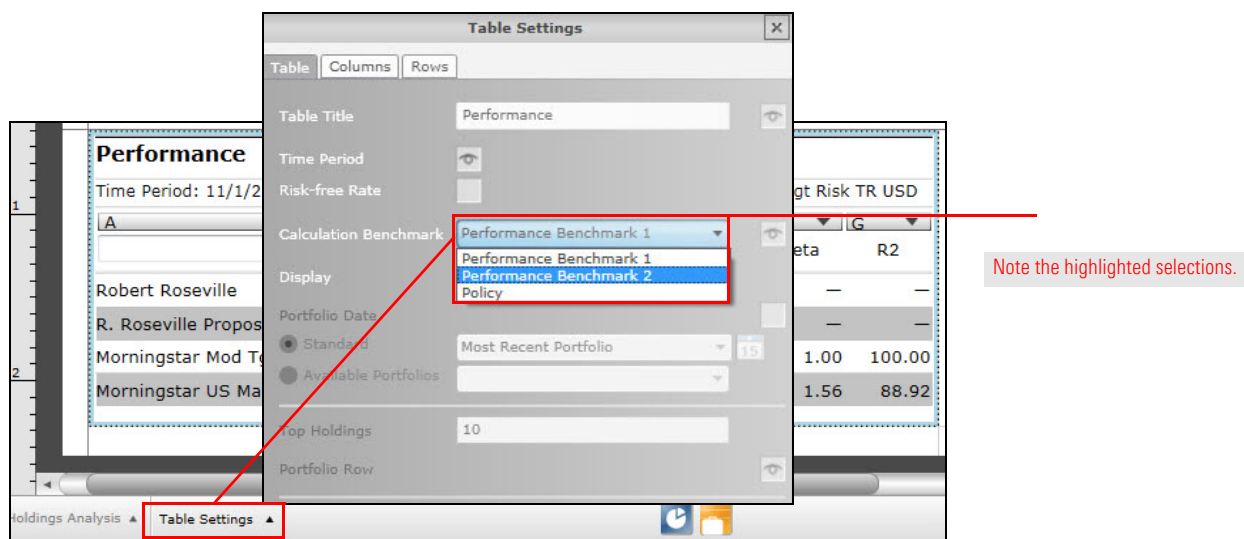
To learn how to assign various objects to a model portfolio or client account, click the following links:

▶ Benchmark
▶ Policy.

When comparing a portfolio and a proposal, or two portfolios, you might want to use one benchmark for certain comparisons but a different benchmark for others. For example, you can use one custom benchmark for performance-related components, and another custom benchmark for asset allocation-related components.

In Presentation Studio, how can I assign a benchmark to be used in comparisons?

To accommodate this need, a third benchmark is now available for Portfolio Comparison templates. This benchmark can be built into a Portfolio Comparison template, but a user can select a different display benchmark when generating a report. This could apply if the user has added a component to his or her report and needs it to be an exception to the template.

Use each component's Component Settings window to select or change a benchmark.

Prior to this release, when setting up a Portfolio Comparison report, each model portfolio or client account had its own performance benchmark, and you could not assign an investment policy in the Report Specifications window.

Now, the performance benchmark(s) and policy of the portfolio or account you initially selected are added; they are then used for all models in the report.

What has changed in generating a Portfolio Comparison report?

This portfolio model supplies the benchmarks and policy used in the report.

The remainder of this document focuses on new and modified features in the Morningstar Excel Add-In. This information became available on November 26, 2018. If you downloaded the latest version of the Morningstar Excel Add-In since then, you don't need to download it again. Include all in 12/15 3x notes

What's new in the Morningstar Excel Add-In?

Prior to this release, most Fixed-Income Primary Sector data points were net, short data. Now long and short rescaled data points are available, as listed in the following table:

What data points have been added to the Fixed-Income Primary Sector?

Data Point Name	Short Name
Fixed-Inc Primary Sector Government % (Net)	FI_Primary_Sector_Government_Net
Fixed-Inc Primary Sector Government Related % (Net)	FI_Primary_Sector_Government_Related_Net
Fixed-Inc Primary Sector Municipal Taxable % (Net)	FI_Primary_Sector_Municipal_Taxable_Net
Fixed-Inc Primary Sector Municipal Tax-Exempt % (Net)	FI_Primary_Sector_Municipal_Tax_Exempt_Net
Fixed-Inc Primary Sector Corporate Bond % (Net)	FI_Primary_Sector_Corporate_Bond_Net
Fixed-Inc Primary Sector Agency Mortgage-Backed % (Net)	FI_Primary_Sector_Agency_Mortgage_Backed_Net
Fixed-Inc Primary Sector Non-Agency Residential Mortgage-Backed % (Net)	FI_Primary_Sector_Non_Agency_Residential_Mortgage_Backed_Net
Fixed-Inc Primary Sector Commercial Mortgage-Backed % (Net)	FI_Primary_Sector_Commercial_Mortgage_Backed_Net
Fixed-Inc Primary Sector Covered Bond % (Net)	FI_Primary_Sector_Covered_Bond_Net
Fixed-Inc Primary Sector Asset-Backed % (Net)	FI_Primary_Sector_Asset_Backed_Net
Fixed-Inc Primary Sector Cash & Equivalents % (Net)	FI_Primary_Sector_Cash_Equivalents_Net
Fixed-Inc Primary Sector Swap % (Net)	FI_Primary_Sector_Swap_Net
Fixed-Inc Primary Sector Forward/Future % (Net)	FI_Primary_Sector_Forward/Future_Net
Fixed-Inc Primary Sector Option/Warrant % (Net)	FI_Primary_Sector_Option/Warrant_Net
Fixed-Inc Primary Sector Government % (Short)	FI_Primary_Sector_Government_Short

Data Point Name	Short Name
Fixed-Inc Primary Sector Government Related % (Short)	FI_Primary_Sector_Government_Related_ Short
Fixed-Inc Primary Sector Municipal Taxable % (Short)	FI_Primary_Sector_Municipal_Taxable_ Short
Fixed-Inc Primary Sector Municipal Tax-Exempt % (Short)	FI_Primary_Sector_Municipal_Tax_Exempt_ Short
Fixed-Inc Primary Sector Corporate Bond % (Short)	FI_Primary_Sector_Corporate_Bond_Short
Fixed-Inc Primary Sector Agency Mortgage-Backed % (Short)	FI_Primary_Sector_Agency_Mortgage_ Backed_Short
Fixed-Inc Primary Sector Non-Agency Residential Mortgage-Backed % (Short)	FI_Primary_Sector_Non_Agency_ Residential_Mortgage_Backed_Short
Fixed-Inc Primary Sector Commercial Mortgage-Backed % (Short)	FI_Primary_Sector_Commercial_Mortgage_ Backed_Short
Fixed-Inc Primary Sector Covered Bond % (Short)	FI_Primary_Sector_Covered_Bond_Short
Fixed-Inc Primary Sector Asset-Backed % (Short)	FI_Primary_Sector_Asset_Backed_Short
Fixed-Inc Primary Sector Cash & Equivalents % (Short)	FI_Primary_Sector_Cash_Equivalents_Short
Fixed-Inc Primary Sector Swap % (Short)	FI_Primary_Sector_Swap_Short
Fixed-Inc Primary Sector Forward/Future % (Short)	FI_Primary_Sector_Forward/Future_Short
Fixed-Inc Primary Sector Option/Warrant % (Short)	FI_Primary_Sector_Option/Warrant_Short
Fixed-Inc Primary Sector Government % (Long)	FI_Primary_Sector_Government_Long
Fixed-Inc Primary Sector Government Related % (Long)	FI_Primary_Sector_Government_Related_ Long
Fixed-Inc Primary Sector Municipal Taxable % (Long)	FI_Primary_Sector_Municipal_Taxable_Long
Fixed-Inc Primary Sector Municipal Tax-Exempt % (Long)	FI_Primary_Sector_Municipal_Tax_Exempt_ Long
Fixed-Inc Primary Sector Corporate Bond % (Long)	FI_Primary_Sector_Corporate_Bond_Long
Fixed-Inc Primary Sector Agency Mortgage-Backed % (Long)	FI_Primary_Sector_Agency_Mortgage_ Backed_Long

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What data points have been added to the Fixed-Income Primary Sector?

Data Point Name	Short Name
Fixed-Inc Primary Sector Non-Agency Residential Mortgage-Backed % (Long)	FI_Primary_Sector_Non_Agency_ Residential_Mortgage_Backed_Long
Fixed-Inc Primary Sector Commercial Mortgage-Backed % (Long)	FI_Primary_Sector_Commercial_Mortgage_ Backed_Long
Fixed-Inc Primary Sector Covered Bond % (Long)	FI_Primary_Sector_Covered_Bond_Long
Fixed-Inc Primary Sector Asset-Backed % (Long)	FI_Primary_Sector_Asset_Backed_Long
Fixed-Inc Primary Sector Cash & Equivalents % (Long)	FI_Primary_Sector_Cash_Equivalents_Long
Fixed-Inc Primary Sector Swap % (Long)	FI_Primary_Sector_Swap_Long
Fixed-Inc Primary Sector Forward/Future % (Long)	FI_Primary_Sector_Forward/Future_Long
Fixed-Inc Primary Sector Option/Warrant % (Long)	FI_Primary_Sector_Option/Warrant_Long
Fixed-Inc Primary Sector Rescaling Factor (Long)	FI_Primary_Sector_Rescaling_Factor_Long
Fixed-Inc Primary Sector Rescaling Factor (Short)	FI_Primary_Sector_Rescaling_Factor_Short
Fixed-Inc Primary Sector Government % (Short Rescaled)	FI_Primary_Sector_Government_Short_ Rescaled
Fixed-Inc Primary Sector Government Related % (Short Rescaled)	FI_Primary_Sector_Government_Related_ Short_Rescaled
Fixed-Inc Primary Sector Municipal Taxable % (Short Rescaled)	FI_Primary_Sector_Municipal_Taxable_ Short_Rescaled
Fixed-Inc Primary Sector Municipal Tax-Exempt % (Short Rescaled)	FI_Primary_Sector_Municipal_Tax_Exempt_ Short_Rescaled
Fixed-Inc Primary Sector Bank Loan % (Short Rescaled)	FI_Primary_Sector_Bank_Loan_Short_ Rescaled
Fixed-Inc Primary Sector Convertible % (Short Rescaled)	FI_Primary_Sector_Convertible_Short_ Rescaled
Fixed-Inc Primary Sector Corporate Bond % (Short Rescaled)	FI_Primary_Sector_Corporate_Bond_Short_ Rescaled
Fixed-Inc Primary Sector Preferred Stock % (Short Rescaled)	FI_Primary_Sector_Preferred_Stock_Short_ Rescaled
Fixed-Inc Primary Sector Agency Mortgage-Backed % (Short Rescaled)	FI_Primary_Sector_Agency_Mortgage_ Backed_Short_Rescaled

Data Point Name	Short Name
Fixed-Inc Primary Sector Non-Agency Residential Mortgage-Backed % (Short Rescaled)	FI_Primary_Sector_Non_Agency_ Residential_Mortgage_Backed_Short_ Rescaled
Fixed-Inc Primary Sector Commercial Mortgage-Backed % (Short Rescaled)	FI_Primary_Sector_Commercial_Mortgage_ Backed_Short_Rescaled
Fixed-Inc Primary Sector Covered Bond % (Short Rescaled)	FI_Primary_Sector_Covered_Bond_Short_ Rescaled
Fixed-Inc Primary Sector Asset-Backed % (Short Rescaled)	FI_Primary_Sector_Asset_Backed_Short_ Rescaled
Fixed-Inc Primary Sector Cash & Equivalents % (Short Rescaled)	FI_Primary_Sector_Cash_Equivalents_ Short_Rescaled
Fixed-Inc Primary Sector Swap % (Short Rescaled)	FI_Primary_Sector_Swap_Short_Rescaled
Fixed-Inc Primary Sector Forward/Future % (Short Rescaled)	FI_Primary_Sector_Forward/Future_Short_ Rescaled
Fixed-Inc Primary Sector Option/Warrant % (Short Rescaled)	FI_Primary_Sector_Option/Warrant_Short_ Rescaled

The data points added to the UK CEF Peer Group are shown in the following table:

What data points have been added to the UK CEF Peer Group?

Data Point Name	Short Name
Ex-Par NAV Weighted DRI Date	Ex_Par_NAV_Weighted_DRI_Date
Ex-Par NAV Weighted DRI	Ex_Par_NAV_Weighted_DRI
Ex-Par NAV Unweighted DRI Date	Ex_Par_NAV_Unweighted_DRI_Date
Ex-Par NAV Unweighted DRI	Ex_Par_NAV_Unweighted_DRI
Ex-Par Weighted Daily Discount Date	Ex_Par_Weighted_Daily_Discount_Date
Ex-Par Weighted Daily Discount	Ex_Par_Weighted_Daily_Discount
Ex-Par Unweighted Daily Discount Date	Ex_Par_Unweighted_Daily_Discount_Date
Ex-Par Unweighted Daily Discount	Ex_Par_Unweighted_Daily_Discount

Data Point Name	Short Name
Cum-Fair NAV Weighted DRI Date	Cum_Fair_NAV_Weighted_DRI_Date
Cum-Fair NAV Weighted DRI	Cum_Fair_NAV_Weighted_DRI
Cum-Fair Weighted Daily Discount Date	Cum_Fair_Weighted_Daily_Discount_Date
Cum-Fair Weighted Daily Discount	Cum_Fair_Weighted_Daily_Discount
Cum-Fair Unweighted Daily Discount Date	Cum_Fair_Unweighted_Daily_Discount_Date
Cum-Fair Unweighted Daily Discount	Cum_Fair_Unweighted_Daily_Discount

Prior to this release, GICS Communications Equipment % (Long) was the only data point for GICS Communications Equipment. The data points listed in the following table have been added:

What GICS Communications Equipment data points have been added?

Data Point Name	Short Name
GICS Communications Equipment % (Long)	GICS_Communications_Equipment_Long
GICS Communications Equipment % (Short)	GICS_Communications_Equipment_Short
GICS Communications Equipment % (Net)	GICS_Communications_Equipment_Net

To align with the recent Morningstar® Sustainability Rating™ changes, the data points Historical Sustainability Score and Portfolio Sustainability Score have been added. The data point shows the 12-month average of Morningstar® Sustainability Score™ values.

What new sustainability data is available?

To learn how the Morningstar Sustainability Rating is calculated, please read the Morningstar Sustainability Rating Methodology.

Based on industry trends and client feedback, the Strategic Beta data methodology has been modified to more accurately filter and compare different index strategies. Three new data points have been added to all open-end, ETF, and index universes. They are collected, not calculated, and are found in the Snapshot view. They are described in the following table:

What is new in Strategic Beta data?

Old Data Point	Definition	New Data Point(s)	Definition
Strategic Beta Attributes	A mix of index selection, index weighting, and general grouping attributes. Because the data was collected for only Strategic Beta index products, the scope of data was too narrow to accurately compare index methodology across all index tracking products. It has been replaced with two separate data points to collect data for all index tracking products and list all index selection and index weighting strategies.	Index Selection	Attributes describing how an index selects its constituents. An index may have multiple attributes.
		Index Weighting	Attributes describing how an index assigns weight to its constituents, based on market beta. An index may have multiple attributes.
Strategic Beta Group	A collected data point, consisting of only three groups. Due to the increasing number of different types of Strategic Beta products, the calculated Strategic Beta Group has been replaced with a more granular, collected Strategic Beta Group data point.	Strategic Beta Group	Classifies strategic beta products according to the similarity of their objectives.

Prior to this release, you could not save changes to a formula. For example, when you first create a formula, the Show Dates setting is off. Later, you may decide to display dates. With the new Save button, you no longer need to rebuild the formula from scratch.

**How can I save changes in a formula?**

Do the following:

1. In the spreadsheet, select the **cell** containing the formula.

2. On the Command bar, select **Morningstar**, then on the Ribbon, click **Investments**. The Morningstar Add-In window opens, displaying the settings for that formula.
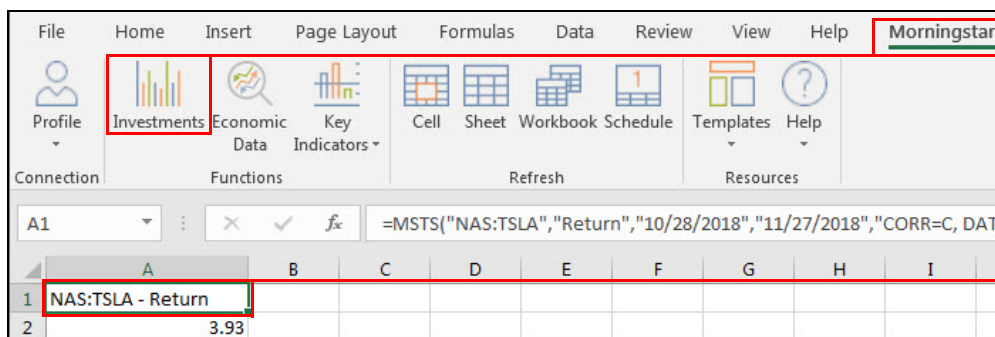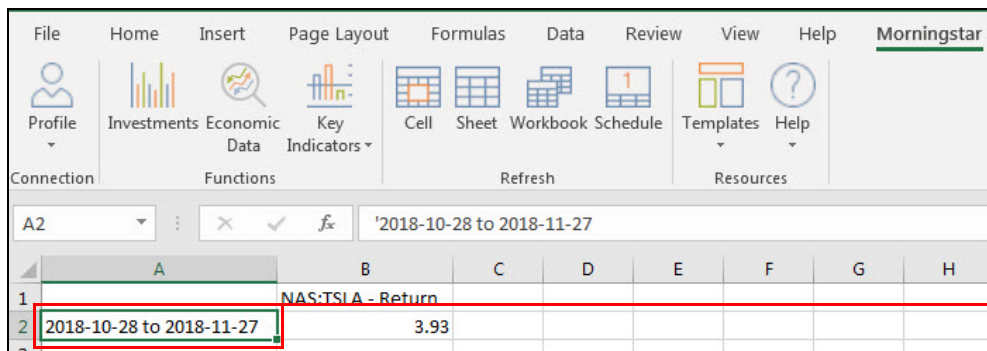

Click the cell containing the formula you want to edit.

3. Click the **Show Dates** checkbox.

4. Click **Save**, then click **Submit**.

Note the highlighted selections.
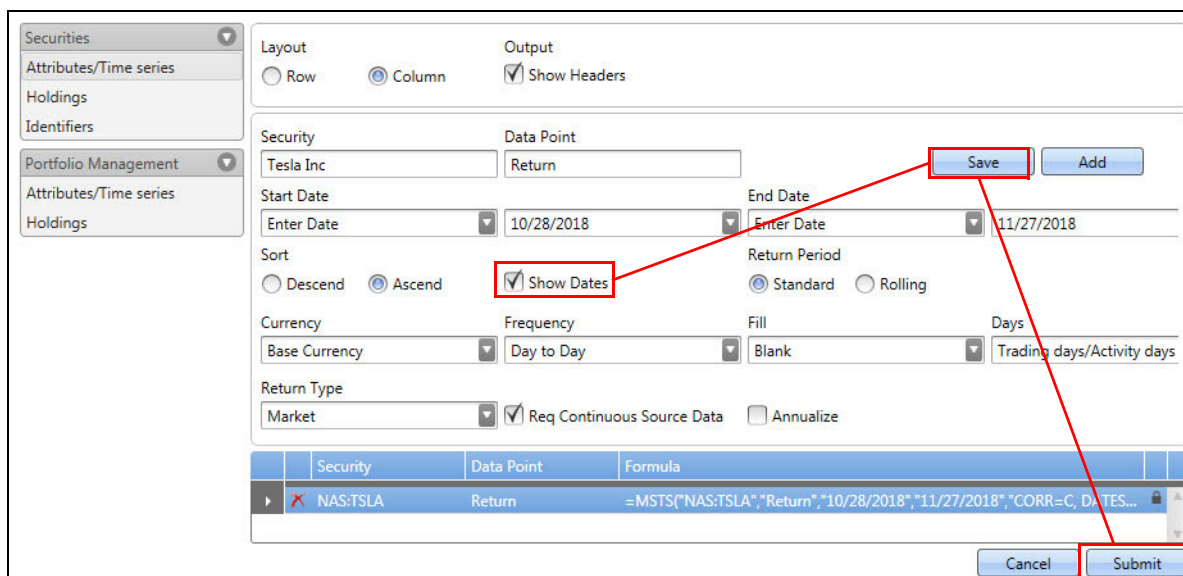
5. **Note** the change to the spreadsheet.

The date is displayed in the spreadsheet.

To correct a data point name duplication, the data point Equity Econ Sector Healthcare % (Long Rescaled) has been renamed Equity Econ Sector Industrials % (Net).

What has changed in Equity Economic Sector data?

To be consistent with Morningstar Direct, the data point CFA GIPS Comp Date has been replaced by GIPS Compliance Verification Date.

If the old data point is used in your work, you need to replace it.

What has changed in Separate Account and Strategy data?

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How can I export the data points in a universe or group
from the Data Dictionary?

You can now export the following from the Morningstar Excel Add-In data dictionary:

- ▸ one or more selected data points
- ▸ the currently selected group of data points, or
- ▸ all data points in the selected universe.

**How can I
export the data points
in a universe or group
from the Data Dictionary?**

Data points are exported as a .csv file, which you can open in Microsoft Excel and use the short name, full name to build your own formula and template.

In this example, you will learn how to export all data points in a universe or group. To learn how to export one or more selected data points, go to How can I export one or more data points from the Data Dictionary? on page 22.

The data points are exported to a .csv file, which you can open in Microsoft Excel.

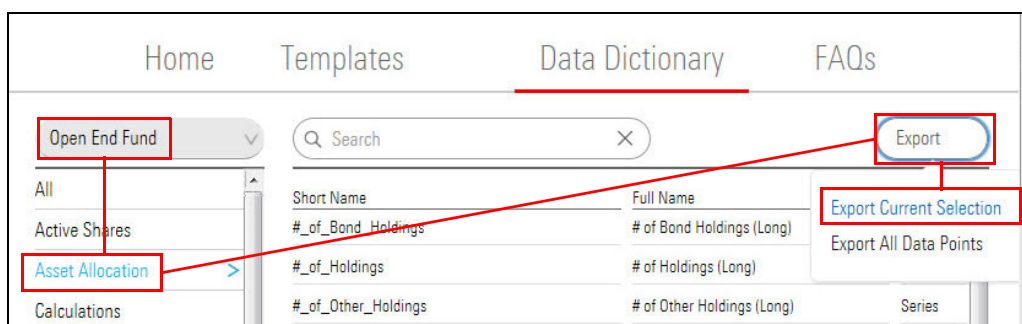Do the following:

1. In a browser, go to **http://addin.morningstarcommodity.com**.

2. Select **Data Dictionary**. The Data Dictionary opens.

3. From the Universe drop-down field, select a **Universe**. The groups in the selected universe are displayed.

4. Select a **group**. The data points in the selected group are displayed in the scroll list to the right.

5. Click **Export**. The Export drop-down field opens.

6. Do one of the following:

   - ▸ To export all data points from the selected group, select **Export Current Selection**, or
   - ▸ To export all data points from all groups in the selected universe, select **Export All Data Points**.

   In the following illustration, the selections are as follows:
   - ▸ Universe: **Open End Fund**
   - ▸ Group: **Asset Allocation,** and
   - ▸ **Export** > **Export Current Selection**.

   ☞ Note: To export all data points in the Open End Fund universe, from the **Export** drop-down field, select **Export All Data Points**.

Note the highlighted selections.

Depending on your browser settings, one of the following happens:
- ▸ A new Excel spreadsheet opens, displaying the exported data points, or
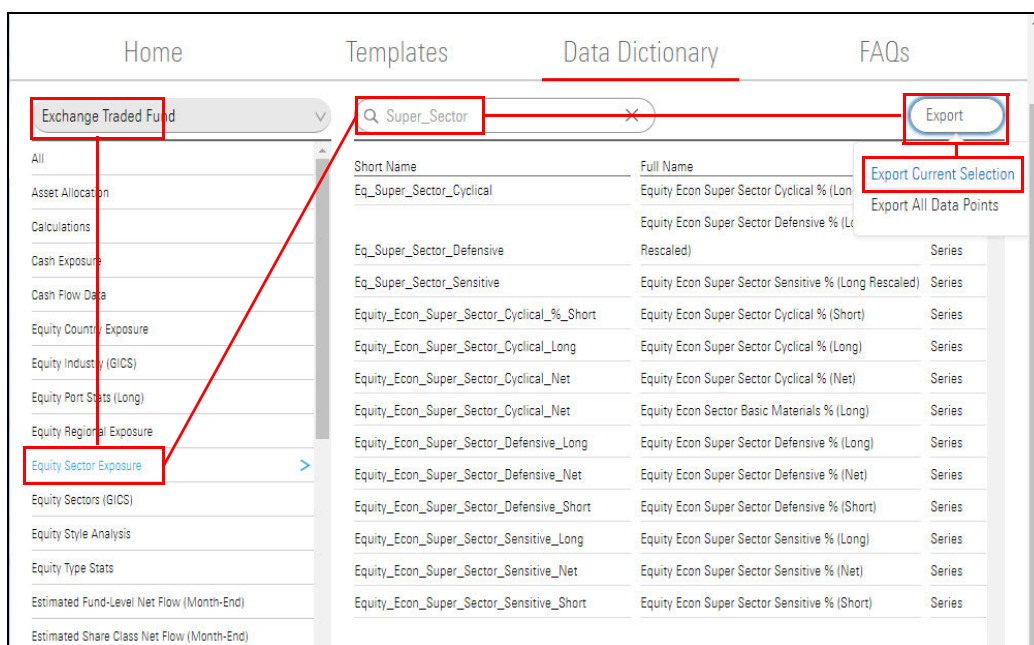- ▸ You are prompted to save the exported data points as a .csv file.

Before you can export one or more data points, use the Search function so that only the data points you want are shown in the scroll list.

In this exercise, you will export all Super Sector data points from the Equity Sector Exposure group in the Exchange Traded Fund universe.

Do the following:

1. In a browser, go to **http://addin.morningstarcommodity.com**.

2. Select **Data Dictionary**. The Data Dictionary opens.

3. From the Universe drop-down field, select **Exchange Traded Fund**. The groups in the Exchange Traded Fund universe are displayed.

4. Select **Equity Sector Exposure**. The data points in the Equity Sector Exposure group are displayed in the scroll list to the right.

5. In the **Search** field, type **Super_Sector**. The list updates as you type.

   ☞ Note: To export a single data point, enter its full short name in the Search field.

6. Click **Export**, then from the Export drop-down field, select **Export Current Selection**.

How can I export one or more data points from the Data Dictionary?

Note the highlighted selections.

Depending on your browser settings, one of the following happens:
- A new Excel spreadsheet opens, displaying the exported data points, or
- You are prompted to save the exported data points as a .csv file.