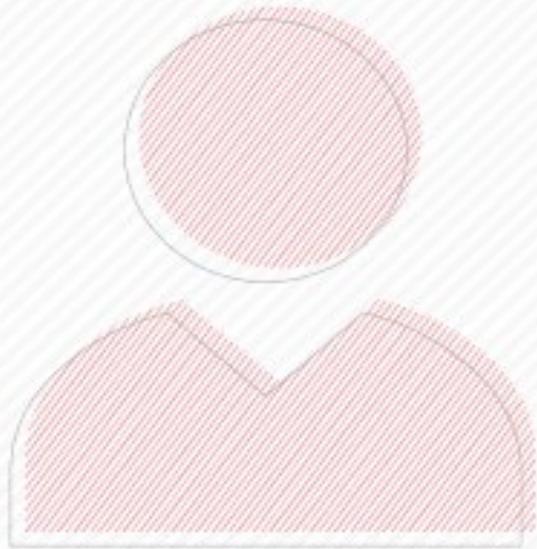


**Workshop Training Guide**  
Morningstar Direct



Reporting on a Model  
Portfolio's ESG scores



MORNINGSTAR Direct



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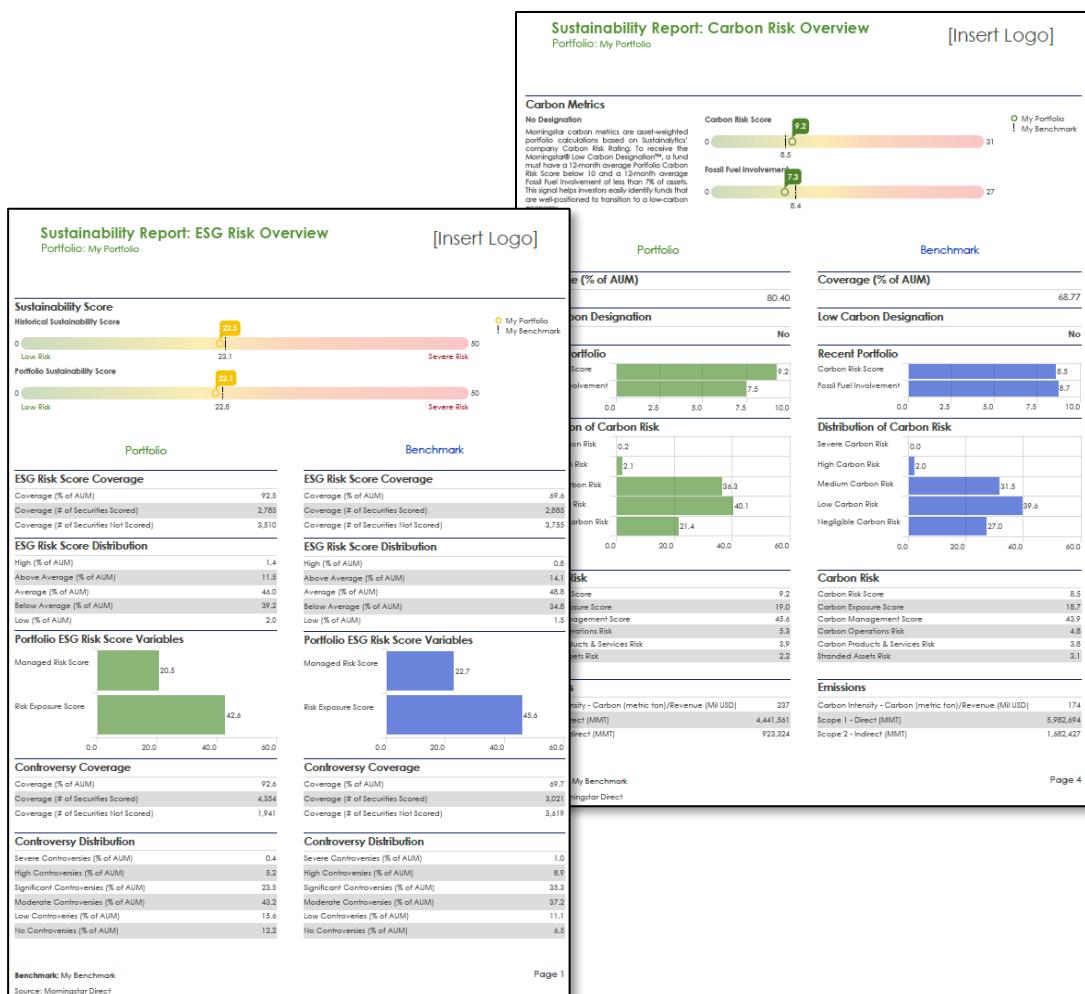
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## Reporting on a Model Portfolio's ESG scores

Now that you have done your created your Model Portfolio, what better way to report on its ESG scores to your internal or external audience than by using Presentation Studio?

You want to create a factsheet to report on your Model Portfolio's ESG scores, product involvement and carbon rating using Presentation Studio.

Should you require to distribute those reports to more than 25 people internally, or to an external audience, please talk to your Customer Success Manager or Sales Representative at Morningstar about a distribution licence.



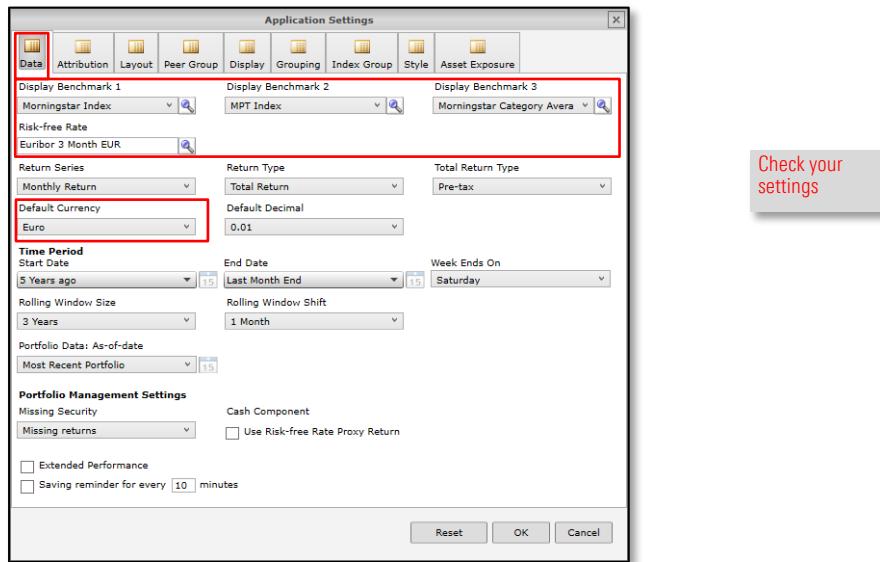
Presentation Studio allows you to create professional, custom-branded factsheets and presentations, appropriate for all of the audiences you reach.

Before working with one of the Morningstar Templates, we will check our settings.

To do so, do the following:

1. From the navigation panel, click **Presentation Studio**.
2. From the top-right corner of the Presentation Studio landing page, click the **Gear** icon . The **Application Settings** dialogue box opens.

☞ **Note:** There are multiple tabs to go through. Today we will only go through a few of them.



3. On the **Data** tab, using the drop-down menus, set **Display Benchmark 1**, **Display Benchmark 2** and **Display Benchmark 3** to your preferred options. In this instance, they are set to the Morningstar Index, the MPT Index and the Morningstar Category Average respectively.
4. Using the magnifying glass, set the **Risk-free Rate** to your preferred risk-free rate. In this instance, it is set to **Euribor 3 Month EUR**.

☞ **Note:** You may decide to leave them on the default and to choose the benchmark of your choice when creating a new report.

5. Set the **Default Currency** to your preferred currency. In this instance, it is set to **Euro**.
6. Click **OK** to save your settings.

## Exercise 1: Application Settings

We will use one of the Morningstar Templates to report on our Model Portfolio's ESG scores.

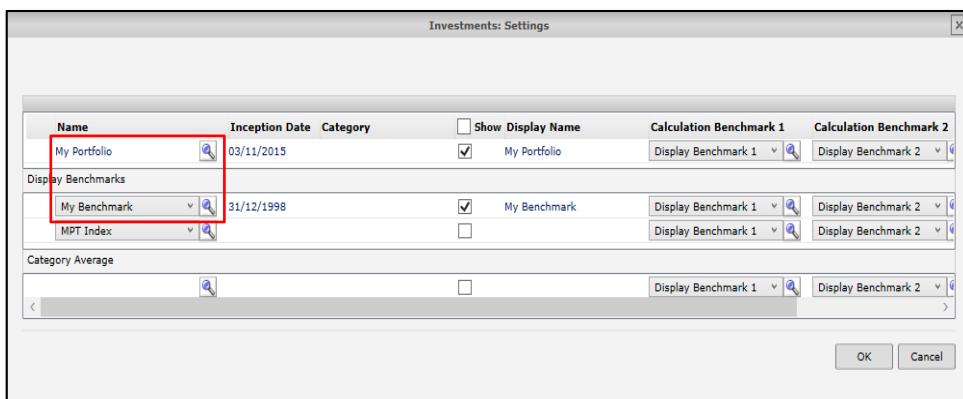
## Exercise 2: Creating a Factsheet from a Template

To do so, do the following:

1. From the Presentation Studio landing page, click the **Morningstar Templates** tab.
2. Expand the **Factsheets** section and double-click on **Sustainability Factsheet (Custom Portfolio)**.
- ☞ **Note:** If you are on a lower version to the one the template was created with, the template will be greyed out. You can still open it by hovering over the template and clicking the 3 dots, then click **Save As > A Duplicate Copy**. The template will then be saved under the **My Templates** tab and you can then double-click on it to open it.
- ☞ **Note:** By doing so, you can still access the template, but any component from a more recent version will not display.
3. The **Investments: Settings** dialogue box opens.

Name	Type	Layout	Version
▶ Workbooks			
▼ Factsheets			
Sustainability Factsheet (Custom Portfolio) <b>New</b>	Factsheet Template	Portrait	3.20.4
Sustainability Factsheet <b>New</b>	Factsheet Template	Portrait	3.20.3

4. Click on the magnifying glass. The **Find Investment** dialogue box opens.
5. Using the **Universe** drop-down menu, select **Model Portfolios**.
6. Type **"My Portfolio"** (or the model portfolio name of your choice) and click **Go**.
7. Select **My Portfolio** (or the model portfolio of your choice) and click **OK**.
8. Under **Display Benchmarks**, click the magnifying glass next to the 1<sup>st</sup> benchmark.
9. Using the **Universe** drop-down menu, select **Custom Benchmarks**.
10. Type **"My Benchmark"** (or the custom benchmark name of your choice) and click **Go**.
11. Select **My Benchmark** (or the custom benchmark of your choice and click **OK**.
12. Click **OK**.

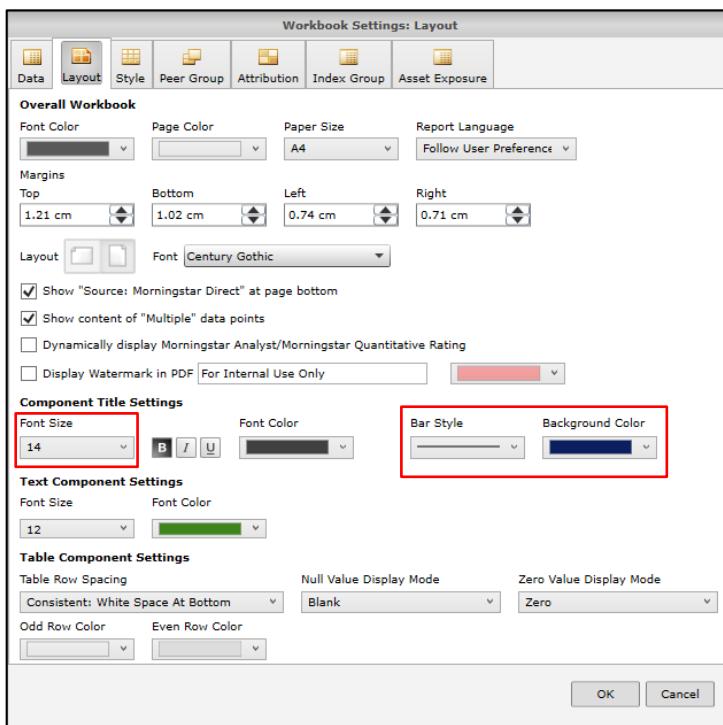


The report opens.

Since we are using a Model Portfolio and a Custom Benchmark, each component will need to calculate the data, and this will take a few minutes. In the meantime, we can work with the Workbook Settings to apply some modifications to our formatting.

 **Note:** If the calculation does not occur, click the Calculate button on the toolbar and click Workbook.

1. From the **Home** tab, click **Workbook**.
2. Click the **Layout** tab.
3. Under **Component Title Settings**, set the **Bar Style** to a thin line and the **Background Colour** to dark blue (1<sup>st</sup> colour from the top) or any other colour of your choice.
4. Set the **Component Title Settings Font Size** to **14**.



 **Note:** on the later versions of Morningstar Direct, you also have an option to change the Page Orientation of the report from Portrait to Landscape. If you do not see this option, you will be required to upgrade Morningstar Direct.

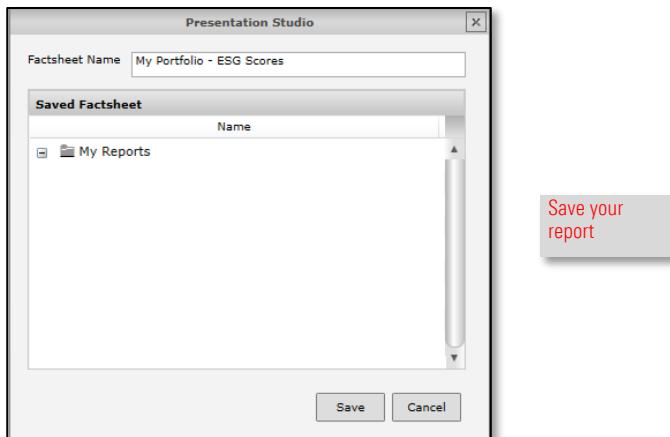
5. Click **OK**.

Your changes are applied to the report.

### Exercise 3: Formatting a Report

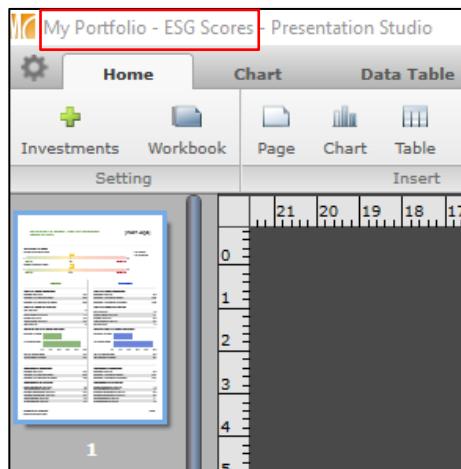
Once the report is calculated, and before making further modifications, let's save the report. To do so, do the following:

1. Click the **Gear**  icon to the left of the Home tab.
2. Click **Save**. The **Save As** dialogue box opens.
3. Type "**My Portfolio – ESG Scores**".
4. Click **Save**.



#### Exercise 4: Saving a Report

You know the report is saved when the title appears on the title bar at the top of the window.

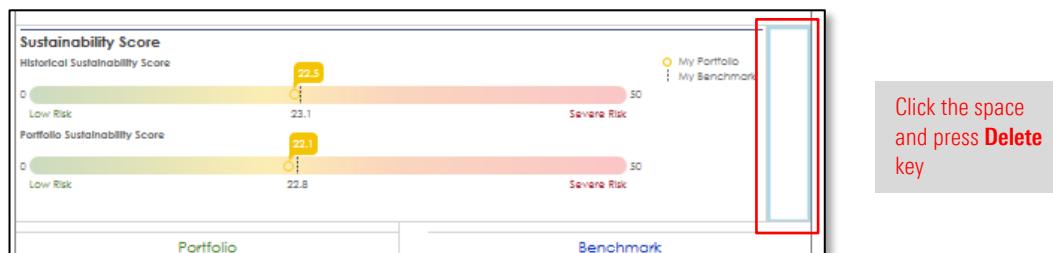


We now want to apply certain changes to the first page:

- ▶ Delete the space to the right of the Sustainability Score chart.
- ☞ **Note:** 3.20.4 is the version the template was created with. If you use a lower version, the component will not display the Sustainability Score chart, but an empty space instead.
- ☞ **Note:** You could instead add the Time Series chart and display the **Historical Sustainability Score** data point.
- ▶ Display values on the Risk Score Variables bar charts components present on the page
- ▶ Remove the tables below those charts
- ▶ Save the custom text "Portfolio" and "Benchmark" as customised components for use on other pages.

To proceed, do the following:

1. Click the empty space to the right of the **Sustainability Score** chart.
2. To remove it, press the **Delete** key on your keyboard.



That space is now removed, and the chart takes the whole width.

Let's now save the Portfolio and Benchmark custom text components for use in other pages later on in this exercise. Any component that you modify can be saved as your own component, saving time and making it easily available to other pages in your report, as well as other reports you will create.

To save a component, do the following:

1. Click the **Portfolio** text box.
2. Right-click and click **Save to My Components** from the menu.
3. In the Component Name field, type "**Portfolio title**".
4. Click **Save**.
5. Click the **Benchmark** text box.
6. Repeat steps 2 to 4 but naming the component "**Benchmark title**".

You can access your saved components by switching the component section to **My Components** on the bottom-left corner of the report window.



## Exercise 5: ESG Risk Overview

### Saving a Component

To add values to the Risk Score Variables charts, do the following:

1. Click the **Portfolio ESG Risk Score Variables** chart to the left of the page to select it.
2. Right-click the chart to bring up the menu.
3. Click **Show Values**. The values now display on the chart.
4. Click the **Portfolio ESG Risk Score Variables** chart to the right of the page to select it.
5. Repeat steps 2 and 3 above.

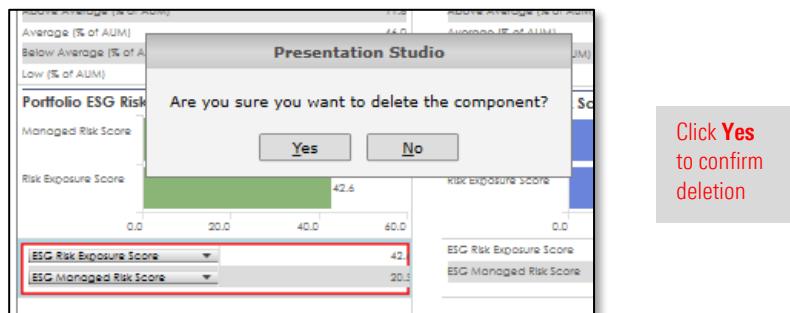


### Showing Values on Charts

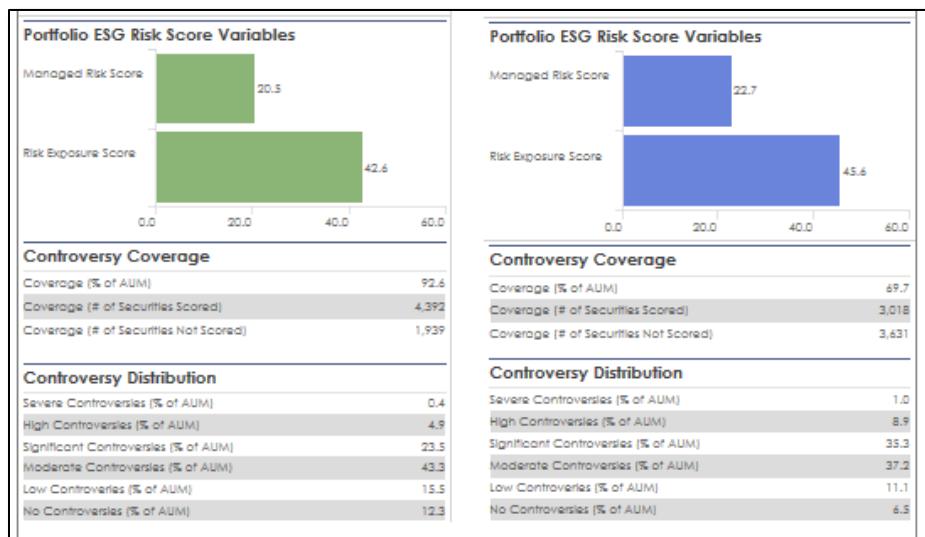
- ☞ **Note:** Portfolio ESG Managed Risk Score is the asset-weighted average of the company managed ESG risk scores for the covered holdings in a portfolio. Company managed ESG risk Scores from Sustainalytics measure the degree to which a company effectively manages risk driven by ESG issues. ESG issues must have a potentially material impact on the economic value of a company to be measured. The managed ESG risk scores are displayed as a number between 0 and 100.
- ☞ **Note:** Portfolio ESG Risk Exposure Score is the asset-weighted average of the company ESG risk overall exposure scores for the covered holdings in a portfolio. Company ESG Risk Exposure Scores represents the overall exposure score from Sustainalytics calculated by adding a company's corporate governance exposure score to the sum of its issue exposure scores which reflect exposure for a given subindustry and the company specific beta assessment.

To delete the tables below those charts, do the following:

1. Click the table just below the left chart.
2. Press the **Delete** key on your keyboard. On prompt, click **Yes** to confirm deletion.



3. Now that you have an empty space, press the **Delete** key on your keyboard to remove that space. Press again to remove the other spaces.
4. Click the table just below the right chart.
5. Repeat steps 2 and 3 to remove that table as well.
6. You can now resize the charts, so they take less space and bring the tables below slightly up.



Controversy Coverage displays the Percent of AUM Covered in terms of controversy, as well as the number of securities scores and not scored.

Controversy Distribution displays a breakdown of the Percent of AUM Covered in terms of controversy from no controversy to severe controversies.

The following page displays the top 25 stock holdings with their ESG Risk, Risk Exposure and Managed Risk scores, Peer Group, Classification, Rating Date, and Controversy information.

Please note that this information will only display for company-level risk data if you have the appropriate licensing in place for Sustainalytics data access.

If you do have access, you could decide to hide the cash holdings displayed in this component. To do so, do the following:

1. Click the **Top 25 Holdings ESG Risk Scores** table.
2. Click **Table Settings** at the bottom left corner of the window. The **Portfolio Holdings** settings window opens.
3. Under the **Table** tab, deselect the checkbox **Include Cash Holdings**.
4. Click **Calculate** on the table. The cash holdings have been removed.
5. Click the **Top 25 Holdings Controversy Scores** table.
6. Repeat steps 2 to 4.

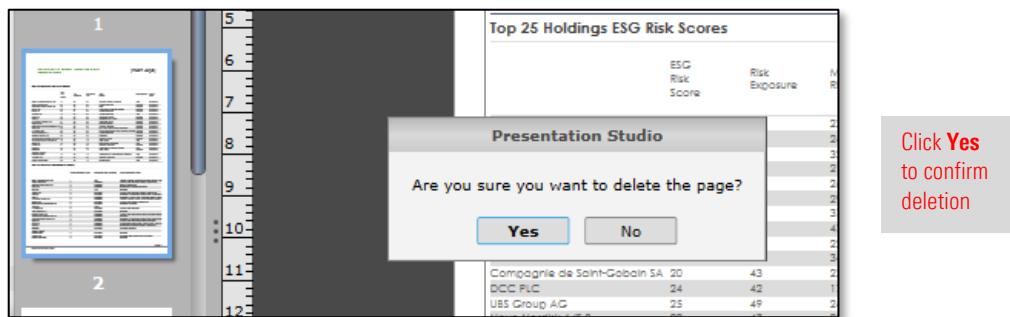
If you do not have access to the company-level add-on, you can then remove the page from the report.

1. On the left navigation panel, click on page 2.
2. Right-click page 2 and click **Delete**.
3. When prompted, click **Yes** to confirm the deletion.
4. Click the Gear icon in the top-left corner of the report and click **Save**.

## Exercise 6: ESG Risk for Stock Holdings

### Removing Cash Holdings from the Portfolio Holdings component

## Exercise 7: Deleting a Page from a report



Let's now move on to the Sustainability Report: Fund Holdings page. Here you will find the top 25 fund holdings with their Sustainability Score, Risk Exposure Score, Managed Risk Score, Global Category, Sustainability Rating Date, and Controversy Percentage of AUM.

### Exercise 8: ESG Risk for Fund Holdings

Top 25 Holdings ESG Risk Scores					
	Portfolio Sustainability Score	Portfolio ESG Risk Exposure Score	Portfolio ESG Managed Risk Score	Global Category	Sustainability Rating Date
BGF Global Allocation A2	23	41	19	Moderate Allocation	31/01/2021
Invesco Pan-Eur Struct. Respnib. Eq. EEURAacc	19	40	21	Europe Equity Large Cap	31/01/2021
Condoriam Sust Pacific C JPY Cap	23	40	17	Asia Equity	31/01/2021
AXA Rosenberg Pan-Eur Eq Alpha A EURAcc	21	44	23	Europe Equity Large Cap	31/01/2021
Shares STOXX Global Sel Div 100 (DE)	22	43	21	Global Equity Large Cap	31/01/2021
Fidelity Special Situations	25	43	18	UK Equity Large Cap	31/01/2021
Invesco Euro Equity A EUR Acc	21	47	26	Europe Equity Large Cap	31/01/2021
Robeco High Yield Bonds DH €				Global Fixed Income	31/01/2021
CASH EUR					

For instance, here we notice here that Fidelity Special Situations has the highest Sustainability Score.

Top 25 Holdings Controversy (% of AUM)					
	High & Severe	Significant	Moderate	Low	None
BGF Global Allocation A2	11	33	38	10	8
Invesco Pan-Eur Struct. Respnib. Eq. EEURAacc	3	28	42	18	9
Condoriam Sust Pacific C JPY Cap	2	10	54	23	12
AXA Rosenberg Pan-Eur Eq Alpha A EURAcc	31	39	11	13	
Shares STOXX Global Sel Div 100 (DE)	5	17	49	14	14
Fidelity Special Situations	2	9	36	23	30
Invesco Euro Equity A EUR Acc	9	34	43	9	4
Robeco High Yield Bonds DH €	6	21	42	15	16
CASH EUR					

And we see here that it has mostly moderate controversies.

We will now apply modifications to the Product Involvement page (the new page 2). We want to simplify the page to compare the fund and benchmark only, and we want to add intentional attributes to check if the fund manager is employing any exclusions from those products, allowing to check this information against the Product Involvement data.

### Exercise 9: ESG Risk - Product Involvement

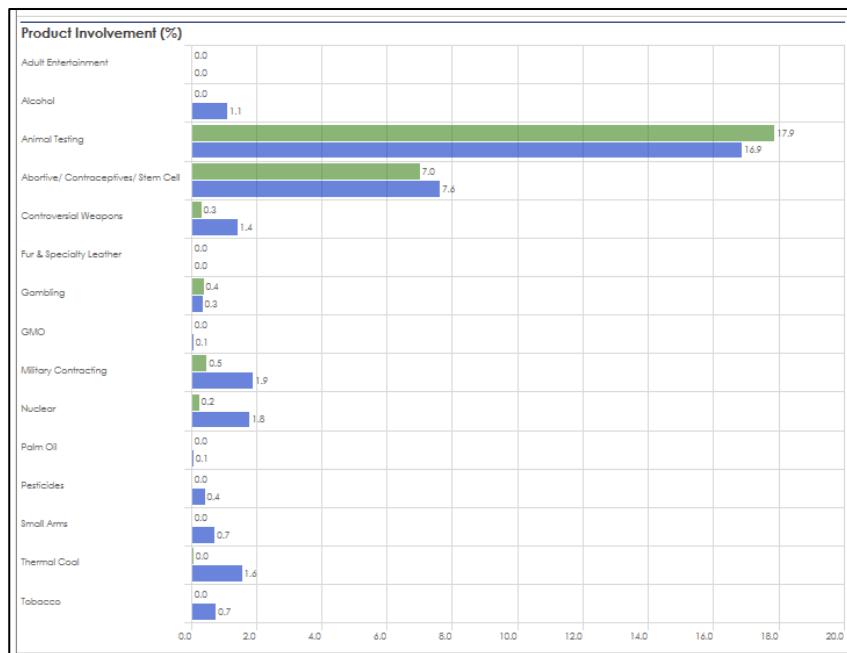
To do so, do the following:

1. From the left navigation panel, click page 2.
2. Click the **Benchmark (%) chart** to the right to select it.
3. Right-click the chart and click **Delete**.
4. When prompted, click **Yes** to confirm the deletion.
5. Click the empty space where the chart was.
6. Right-click and click **Delete** to remove this space.

We will now display the benchmark on the remaining chart.

7. Click the chart to select it.
8. From the **Chart** tab, click **Investments**.
9. Under the **Show** column, select the checkbox corresponding to the benchmark.
10. Click **OK**.
11. Right-click on the chart and click **Show Values**.
12. Click **Chart Settings** and change the chart title to **Product Involvement (%)**.
13. Set the **Font Size** to **10** from the Chart tab at the top.
14. Click **Calculate**.

You are now successfully comparing the fund versus the benchmark and displaying their product involvement %.

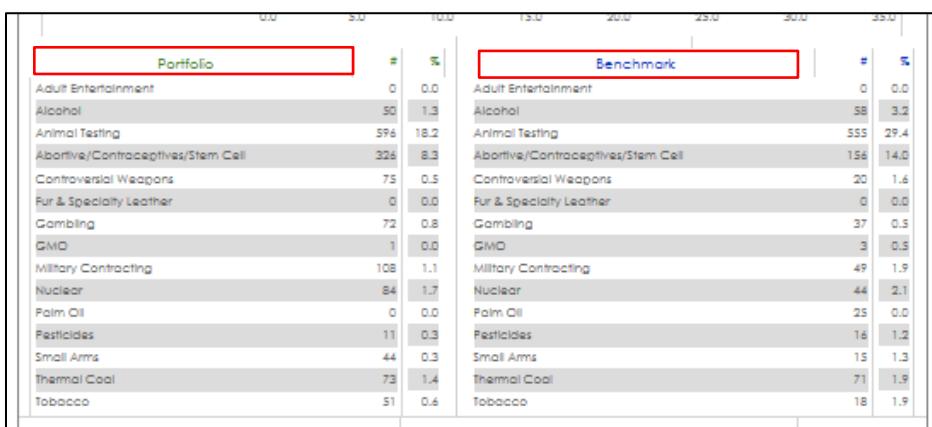


Let's now add the custom text components we saved for the Portfolio and Benchmark above the tables.

### Using saved components

To add the Portfolio title to the left table, do the following:

1. Click the empty space above the left table to select it.
2. In the bottom-left corner of the report windows, ensure **My Components** is selected. This will display icons for any component you may have saved on the bottom toolbar.
3. Hover over the Text components to identify the **Portfolio title** component and drag and drop it onto the empty space.
4. Click the empty space above the right table to select it.
5. Repeat steps 2 and 3 with the **Benchmark title** component.



Portfolio			
	#	%	
Adult Entertainment	0	0.0	
Alcohol	50	1.3	
Animal Testing	594	18.2	
Abortive/Contraceptives/Stem Cell	324	8.3	
Controversial Weapons	75	0.5	
Fur & Specialty Leather	0	0.0	
Gambling	72	0.8	
GMO	1	0.0	
Military Contracting	108	1.1	
Nuclear	84	1.7	
Palm Oil	0	0.0	
Pesticides	11	0.3	
Small Arms	44	0.3	
Thermal Coal	73	1.4	
Tobacco	51	0.6	

Benchmark			
	#	%	
Adult Entertainment	0	0.0	
Alcohol	58	3.2	
Animal Testing	555	29.4	
Abortive/Contraceptives/Stem Cell	156	14.0	
Controversial Weapons	20	1.6	
Fur & Specialty Leather	0	0.0	
Gambling	37	0.5	
GMO	3	0.5	
Military Contracting	49	1.9	
Nuclear	44	2.1	
Palm Oil	25	0.0	
Pesticides	16	1.2	
Small Arms	15	1.3	
Thermal Coal	71	1.9	
Tobacco	18	1.9	

The Portfolio and Benchmark titles now appear on the report.

Let's move on to the Carbon Risk Overview page of the report.

Just as with the Sustainability Score component on the first page of the report, you need to be on a recent version of Morningstar Direct to see the Carbon Metrics component. If you are on a lower version, you will not see the Carbon metrics chart in the top-left section of the report, but instead you will see a blank space, in which case you could add the Time Series chart component and display the **Carbon Risk Score** data point.

In this instance we will assume that you have the most recent version and we want to delete the space to the right of the Carbon Metrics chart.

To proceed, do the following:

1. Click the empty space to the right of the **Carbon Metrics** chart.
2. To remove it, press the **Delete** key on your keyboard.



That space is now removed, and the chart takes the whole width.

Note how the model portfolio does not have the Low Carbon Designation™. Its 12-month average Portfolio Carbon Risk Score average of 9.2% meets the requirement (below 10% of assets), however its 12-month Fossil Fuel Involvement is just over the threshold with 7.3% (it should be below 7% of assets).

The rest of the page provides us with a visual breakdown of the Low Carbon Designation™, the distribution of Carbon Risk from negligible to severe, Carbon Risk information and Emissions (direct and indirect) for both the portfolio and the benchmark.

Let's move on to the next page, Carbon Involvement.

## Exercise 10: Carbon Risk Overview

Carbon Involvement is the level of involvement in terms of percentage of annual revenues in specific products and services related to Fossil Fuel.

### Exercise 11: Carbon Involvement

Just like we did with the Product Involvement page, we will display the portfolio and benchmark on a single chart, but this time we will change the bar chart orientation from horizontal to vertical.

To proceed, do the following:

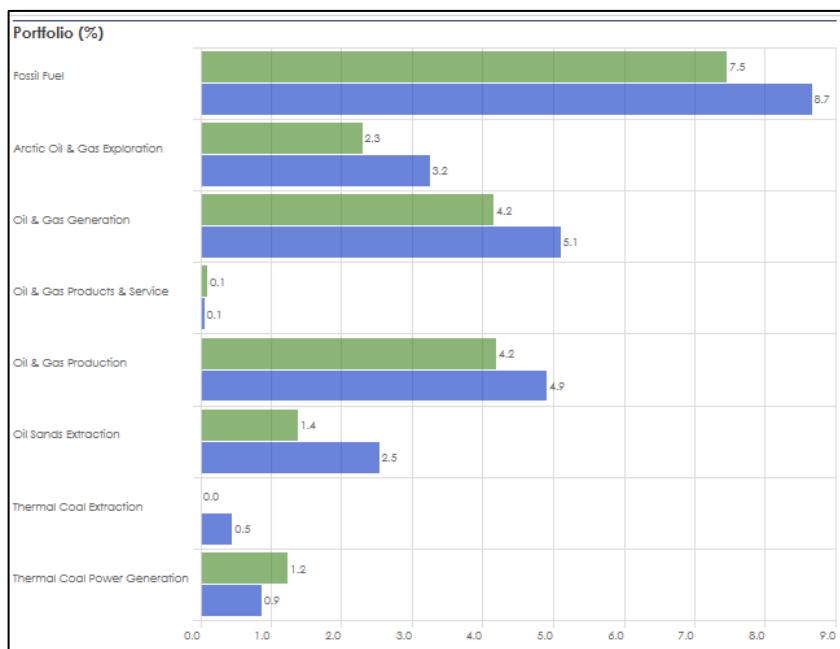
To do so, do the following:

1. From the left navigation panel, click page 2.
2. Click the **Benchmark (%)** chart to the right to select it.
3. Press the **Delete** key on your keyboard.
4. When prompted, click **Yes** to confirm the deletion.
5. Click the empty space where the chart was.
6. Press the **Delete** key on your keyboard to remove this space.
7. There are couple of other empty spaces you can remove to the left and right of the **Portfolio (%)** chart.

We will now display the benchmark on the remaining chart.

8. Click the chart to select it.
9. From the **Chart** tab, click **Investments**.
10. Under the **Show** column, select the checkbox corresponding to the benchmark.
11. Click **OK**.
12. Right-click on the chart and click **Show Values**.
13. Click **Chart Settings** and change the chart title to **Carbon Involvement (%)**.
14. Click **Calculate**.

You are now successfully comparing the fund versus the benchmark and displaying their carbon involvement %.



Just as we did on the Product Involvement page, let's now add the custom text components we saved for the Portfolio and Benchmark above the tables.

To add the Portfolio title to the left table, do the following:

1. Click the empty space above the left table to select it.
2. In the bottom-left corner of the report windows, ensure **My Components** is selected. This will display icons for any component you may have saved on the bottom toolbar.
3. Hover over the Text components to identify the **Portfolio title** component and drag and drop it onto the empty space.
4. Click the empty space above the right table to select it.
5. Repeat steps 2 and 3 with the **Benchmark title** component.

The Portfolio and Benchmark titles now appear on the report.

Portfolio	
Fossil Fuel	
Fossil Fuel	7.5
Arctic Oil & Gas Exploration	2.3
Oil & Gas Generation	4.2
Oil & Gas Products & Service	0.1
Oil & Gas Production	4.2
Oil Sands Extraction	1.4
Thermal Coal Extraction	0.0
Thermal Coal Power Generation	1.2

Benchmark	ESG
Fossil Fuel	8.7
Arctic Oil & Gas Exploration	3.2
Oil & Gas Generation	5.1
Oil & Gas Products & Service	0.1
Oil & Gas Production	4.9
Oil Sands Extraction	2.5
Thermal Coal Extraction	0.5
Thermal Coal Power Generation	0.9

The next page displays the top 25 stock holdings with their Carbon Risk, Carbon Exposure and Carbon Managed Risk scores, Carbon Risk Classification, and Emissions information

### Exercise 12: Carbon Risk Scores for Stock Holdings

Please note that this information will only display for company-level risk data if you have the appropriate licensing in place for Sustainalytics data access.

If you do have access, you could decide to hide the cash holdings displayed in this component. To do so, do the following:

7. Click the **Top 25 Holdings Carbon Risk Scores** table.
8. Click **Table Settings** at the bottom left corner of the window. The **Portfolio Holdings** settings window opens.
9. Under the **Table** tab, deselect the checkbox **Include Cash Holdings**.
10. Click **Calculate** on the table. The cash holdings have been removed.
11. Click the **Top 25 Holdings Carbon Intensity & Emissions** table.
12. Repeat steps 2 to 4.

If you do not have access to the company-level add-on, you can then remove the page from the report.

5. On the left navigation panel, click on page 2.
6. Right-click page 2 and click **Delete**.
7. When prompted, click **Yes** to confirm the deletion.
8. Click the Gear icon in the top-left corner of the report and click **Save**.

We now move on to the last page of the report, which displays the top 25 funds Carbon Risk Scores with the Carbon Risk Score, Carbon Exposure Score, Carbon Management Score as well as Morningstar Category and Carbon Date.

### Exercise 13: Carbon Risk Scores for Fund Holdings

Top 25 Holdings Carbon Risk Scores					
	Carbon Risk Score	Carbon Exposure Score	Carbon Management Score	Morningstar Category	Carbon Date
BGF Global Allocation A2	7	14	37	EAA Fund USD Moderate Allocation	31/12/2020
Invesco Pan Eurp Struct Rspnbl Eq EEURAcc	5	13	49	EAA Fund Europe Large-Cap Blend Equity	31/12/2020
Canamid Sust Pacific C JPY Cap	9	17	43	EAA Fund Asia-Pacific Equity	31/12/2020
AXA Rosenberg Pan-Eurp Eq Alpha A EURAcc	8	19	48	EAA Fund Europe Large-Cap Blend Equity	31/12/2020
iShares STOXX Global Sel Div 100 (DE)	13	24	48	EAA Fund Global Equity Income	31/12/2020
Fidelity Special Situations	13	22	40	EAA Fund UK Flex-Cap Equity	31/12/2020
Invesco Euro Equity A EUR Acc	11	26	55	EAA Fund Eurozone Large-Cap Equity	31/12/2020
Robeco High Yield Bonds DH €				EAA Fund Global High Yield Bond - EUR Hedged	31/12/2020
CASH EUR					

Here we note that Invesco Pan Eurp has the lowest Carbon Risk Score of 7, with a Carbon Exposure Score of 13 and a Carbon Management Score of 49%.

Carbon Exposure Score evaluates the level of carbon-related risk that exists in the value chain among companies held in the portfolio. Just like with Carbon Risk Score, the lower the value, the better.

Carbon Management Score evaluates on a company's preparedness and track record in managing carbon operations and products and services risks that are considered manageable.

The second part of the page displays information about Carbon Intensity and Emissions (direct and indirect).

Top 25 Holdings Carbon Intensity & Emissions			
	Carbon Intensity	Emissions Scope 1	Emissions Scope 2
BGF Global Allocation A2	169		
Invesco Pan Eurp Struct Rspnbl Eq EEURAcc	108	2,594,643	542,982
Canamid Sust Pacific C JPY Cap	69	594,058	607,425
AXA Rosenberg Pan-Eurp Eq Alpha A EURAcc	130	4,975,912	865,291
iShares STOXX Global Sel Div 100 (DE)	767	4,300,656	934,685
Fidelity Special Situations	187	3,391,307	305,703
Invesco Euro Equity A EUR Acc	199	7,968,806	861,833
Robeco High Yield Bonds DH €			
CASH EUR			

Looking at the same fund in the Carbon Intensity & Emissions table below, we note that it's the 3<sup>rd</sup> lowest in terms of Carbon Intensity.

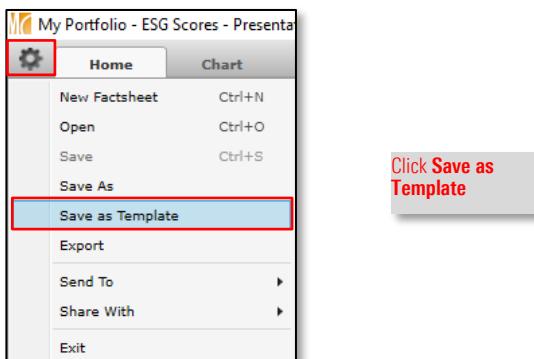
Carbon Intensity measures the level of emissions a company produces compared with its declared revenue and is computed as follows: Total Emissions (metric tonnes of Co2) / Revenue (Mil USD).

We can now proceed with saving the report as a template. As a reminder:

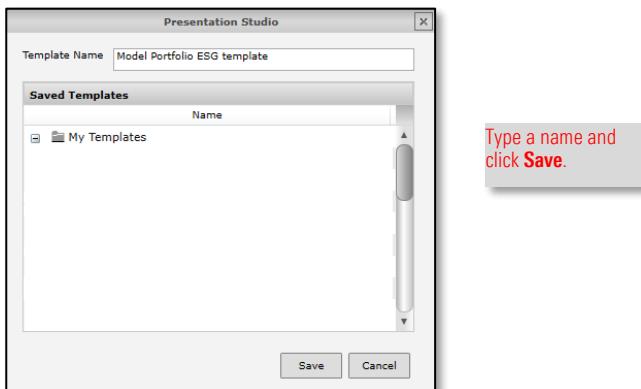
- A **report** holds all the above as well as the chosen security and benchmark settings.
- A **template** holds your chosen charts and tables, layout, font, set currency, colours, logos, disclaimers, custom and dynamic text. It does not hold any investments or benchmarks.

1. Click the **Gear** icon in the top-left corner of the window.
2. Click **Save** to save the report.
3. Click the **Gear** icon in the top-left corner of the window again.
4. Select **Save as Template**. The **Presentation Studio** dialogue box opens.

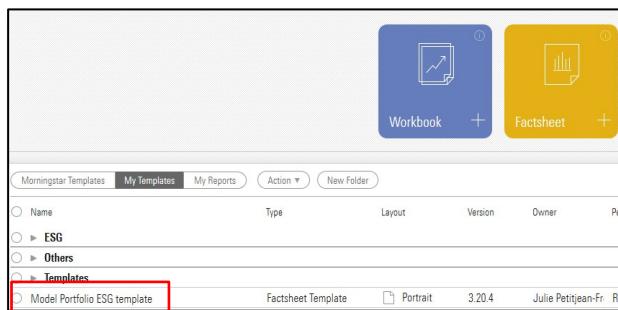
### Exercise 14: Saving a Template



5. In the **Factsheet Name** field, type "**Model Portfolio ESG template**".
6. Click **Save**.



Close the report. You can now access this template from the Presentation Studio landing screen under **My Templates** and generate the same factsheet with other investments.



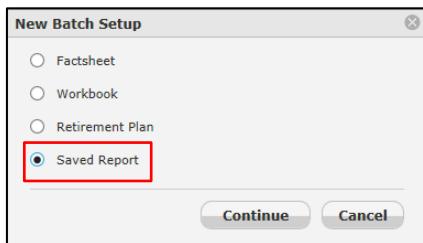
Reports using Model Portfolios and Custom Benchmarks can take a lot of time to calculate. It is therefore advised to use the Batch function to calculate them.

Batch Management enables the user to automate the update and export of your Presentation Studio reports. You then receive an email notifying you that the batch is completed, and you can then download the reports.

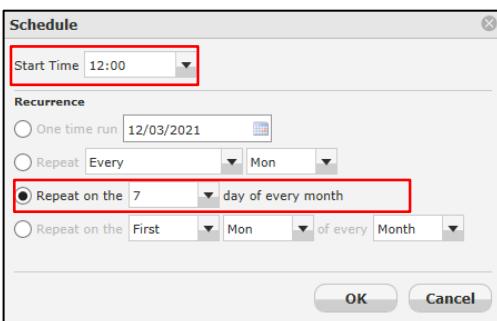
You can create a maximum of 5 batches, with 25 reports in each. Should you require to extend those capabilities, please reach out to your Customer Success Manager.

To create a batch, do the following:

1. From the **Presentation Studio** landing page, click the **Batch Management** tile. The **Batch Reporting** window opens.
2. From the **Toolbar**, click **New Batch**. The **New Batch Setup** dialogue box opens.
3. Select **Saved Reports** and click **Continue**. The **Select Reports** window opens.



4. Select **"My Portfolio – ESG Scores"**.
- Note:** You can use the CTRL key on your keyboard and select up to 25 reports.
7. Click **OK**. The **Saved Reports – New Batch Setup** window opens.
8. Select the **File Format** for your preferred output, PDF in this instance.
9. Click **Schedule**. The **Schedule** window opens.
10. Set the Start Time to **12:00**.
11. Select **Repeat on the 7<sup>th</sup> day of the month**.



12. Click **OK** and then **Save**.

Your batch is now set up to update your report on the 7<sup>th</sup> of every month at 12:00.

## Exercise 15: Updating Reports with Batch Management