

Morningstar Direct Training Guide Alerts

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## Alerts

### **Overview**

With Morningstar Direct you can set up alerts to be notified of any significant changes – such as a manager change or a Morningstar Rating change – for an investment of your choice.

There are three types of alerts available in Morningstar Direct:

- ► Price alerts
- Morningstar alerts
- ► Filings alerts

In this exercise guide you will learn how to create each alert type.

**Exercise 1: Default Alert** 

Settings

Prior to using Alerts, it is recommended to go through the settings.

Do the following:

- 1. Go to **Home > Alerts**.
- 2. From the toolbar, click **Default Alert Settings**. The **Alert Details** dialogue box opens.

Alerts			
Action	🔹 🏦 Export 🖷 Print	Add 👻	🔲 Default Alert Settings
	Alert Title Display Currency : EUR		Trigger Date

Note how your email address is already populated in the Additional Email Address field. You are able to add up to 25 additional email addresses separated with a comma.

By doing so, all recipients will receive all alerts that you will set up under the Alerts section.

We want to ensure that we do receive an email every time there is a change.

- 3. Make Alert Inactive after First Trigger: do not select if you want a recurring notification.
- 4. Send email: select if you want to receive an email notification.
  - Mote: If you do not select it, you will be able to view triggered alerts within Morningstar Direct.
- 5. Auto Delete Triggered Results after 30 days: do not select if you want to keep all triggered alerts.

Morningstar Direct X Alerts Details Set default values to use when creating new alerts, and add up to 25 additional email addresses (comma separated with no spaces) for whom should receive alert notifications. Additional Email Address julie.petitjean-freytet@morningstar.com
Alerts Details Set default values to use when creating new alerts, and add up to 25 additional email addresses (comma separated with no spaces) for whom should receive alert notifications. Additional Email Address julie.petitjean-freytet@morningstar.com
Additional Email Address julie.petitjean-freytet@morningstar.com
julie.petitjean-freytet@morningstar.com
<ul> <li>Make Alert Inactive after First Trigger</li> <li>✓ Send email</li> <li>Auto Delete Triggered Results after 30 days</li> </ul>
Save Cancel

6. Click **Save**.

Let's have a look at the first alert type available in Morningstar Direct: Price alerts.

Here you will be able to set up alerts for a list of securities to be alerted if the price went up or down by a certain %. There are also other options available there.

Exercise 2: Creating a Price Alert

To set up a Price alert, do the following:

1. From the toolbar, click **Add > Price alert**. The **Add: Price Alerts** dialogue box opens.

Alerts	Alerts							
Action 🔹 🏝 Export 🍓 Print Add 👻 🔤 Default Alert Settings View Triggered Alerts 🔍								
	Alert Title Display Currency : EUR	Price A	lerts	e 🗸	Security	Additional Information	Direction	Previous Value
1	Morningstar Rating Cha	Mornin	Morningstar Alerts		Allianz Wachstum Europa	**Sample list Large Cap	UP	3
2	Morningstar Rating Cha	Filing A	Filing Alerts		Handelsbanken Europa In	**Sample list Large Cap	UP	3
3	Fund Manager Change		01/02/202	0	Fidelity European Dynami	**Sample list Large Cap		Fabio Riccelli
4	Fund Manager Change		01/02/202	0	Fidelity European Dynami	**Sample list Large Cap		Fabio Riccelli
5	Morningstar Analyst Rat	ing Chan	ge 12/10/201	9	Fidelity European Growth	**Sample list Large Cap		Bronze
6	Morningstar Analyst Rat	ing Chan	ge 12/10/201	9	Fidelity European Growth	**Sample list Large Cap		Bronze
7	Morningstar Rating Cha	nge	12/06/201	9	Swedbank Robur Europaf	**Sample list Large Cap	UP	3
8	Morningstar Rating Cha	nge	12/06/201	9	Metropole Selection A	**Sample list Large Cap	DOWN	3

- Using the Security drop-down menu, use the Search field to look for Fidelity Special Situations.
- 3. Select the checkbox to the left of the fund name to select it.

Morningstar Direct		×
Add:Price Alerts		
Price alerts can be setup for any Morningstar tracked investment. Alerts ar data. Price alerts can be created for one or multiple investments at a time.	e triggered on an intra-day bi	asis based on real time price
Security Securities: Fidelity Special Situations		
Price / fidelity special situations		
Price Securities (1)		Send Email Auto Delete
Price Open-End Funds Close Price on	First Trigger	Send Email 🗌 Auto Delete
Price     Fidelity Special Situations     Close Price     Fidelity Special Situations W Aci	Make Alert Inactive after     First Trigger	Send Email 🗌 Auto Delete
Price Fidelity Special Situations Serie		✓ Send Email
Volume Fidelity Special Situations Serie		☑ Send Email 🗌 Auto Delete
52-Wee Fidelity Special Situations Serie		✓ Send Email 🗌 Auto Delete
52-Wee		✓ Send Email
S2-Wets right englisher		Send Email 🗌 Auto Delete
52-Week Low Chg % > ¥		Send Email 🗌 Auto Delete
Security Trading on High Volume	Make Alert Inactive after     First Trigger	Send Email 🗌 Auto Delete
S2-Week High	Make Alert Inactive after First Trigger	Send Email 🗌 Auto Delete
52-Week Low	Make Alert Inactive after     First Trigger	Send Email 🗌 Auto Delete
		Save Cancel

- 4. Search for and select **Comgest Growth Europe EUR Acc**.
- 5. Select **Price >= 2% of last Close Price**.

15							
Morningstar Direct			×				
Add:Price Alerts							
Price alerts can be setup for any Morningstar tracked investment. Alerts are triggered on an intra-day basis based on real time price data. Price alerts can be created for one or multiple investments at a time.							
Security 2 Selected	~						
<ul> <li>Price Alerts</li> </ul>							
Price	>= V		✓ Send Email □ Auto Delete				
Price	increased by % of last Close Price of High Volume	n □ Make Alert Inactive after First Trigger	✓ Send Email □ Auto Delete				
✔ Price	increased by 2 % of last Close Price	Hake Alert Inactive after First Trigger	Send Email 🗌 Auto Delete				

- 6. Click **Save**. You are returned to the Alerts window.
- 7. From the toolbar, select **Alerts Rules** from the **View** drop-down menu. Your newly created alerts display on screen.

Alerts	Alerts							
Action 🗸 🏦 Print Add + 🖬 Default Alert Settings View Alert Rules 🗸								
	Alert Title	Security	Additional Information	Date Set	Email	Recurring	Auto Delete	
1	Price >= x% Up	Fidelity Special Situations		01/23/2020	Yes	Yes	No	
2	Price >= x% Up	Comgest Growth Europe EL		01/23/2020	Yes	Yes	No	
_								



**Morningstar Alerts** flag any changes to Morningstar ratings, peer group classifications, Equity and Fixed Income Style boxes, and much more.

In this exercise you will learn how to select an Investment List saved in Workspace, and how to general multiple alerts for the selected securities.

To create a Morningstar Alert, do the following:

- From the toolbar, click Add > Morningstar alert. The Add: Morningstar Data Points Alerts dialogue box opens.
- 2. Using the **Security** drop-down menu, click the **Investment List** section.
- 3. Select the Investment List labelled **Multiple Investments**, which you created during the <u>Working with Lists</u> exercise guide.
  - Mote: If you did not complete this exercise, please select any other investment list containing funds.
- 4. Click the **Securities** section.
- 5. Search for Comgest Growth Europe EUR Acc and select it.
- 6. Click on the side of the drop-down menu to close it.

You have now selected the securities saved in an Investment List and an additional fund.

Morningstar Direct							
Add:Horningstar Data Point Alerts Morningstar alerts can be setup for any Morningstar tracked i alerts can be created for one or multiple investments at a tim Contribution Plan.							
Security 2 g	Selected 💌						
End of Da	omgest growth europe eur acc 🛛 🛞						
▼ Mornin <sub>Se</sub>	curities (1)						
Star Ra Op	en-End Funds						
Star Ra	Comgest Growth Europe EUR A						
	Comgest Growth Europe EUR I						
	Comgest Growth Europe Opps E						
🗌 Mornin <u>ç</u> 🔤	Comgest Growth Europe Opps E						
🗌 Financii 📃	Comgest Growth Europe EUR Z						
Growth	Comgest Growth Europe ex UK						
Profitat De	efined Contribution Plans (0 of 2)						
In	vestment List (1 of 74)						
Listing Vi	ew Selected						
→ Actions							

We will now proceed and select the following alerts:

- 1. Expand the Morningstar Ratings and Analysis section.
- 2. Select Star Rating and Morningstar Analyst Rating Change.
- 3. Expand the Fund Portfolio section.
- 4. Select Morningstar Category and Morningstar Fixed Income Style.
- 5. Expand the Nuts & Bolts section.
- 6. Select Fund Manager Change and Equity Style box.
- 7. Click Save.

Exercise 3: Creating a Morningstar Alert

<u>File New Favorites Too</u>	ls <u>H</u> elp	Search for In Securitie	is • Go	Send us fee	dback			
ome	Alerts							
Home	Action	・ 念 Export 過 Print Add ・ 回 Del	fault Alert Settings View	lert Rules				
Alerts		Alert Title	Security	Additional Information	Date Set	Email	Recurring	Auto Dele
🗉 Filings								
Excel Add-In	<b>E</b> 1	Norningstar Equity Style Box Change	YT Europa FUR R01 T	Multiple Investments	01/23/2020	Yes	Yee	No
Help/Definitions	2	Morningstar Equity Style Box Change	SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No
Morningstar Publications	3	Morningstar Equity Style Box Change	KBC Eq Ed Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
HFR Research	<b>F</b> 4	Morningstar Equity Style Box Change	IPMorgan SAR European A	Multiple Investments	01/23/2020	Yes	Yes	No
Learning Center	5	Morningstar Equity Style Box Change	Deka STOXX® Europe Stro	Multiple Investments	01/23/2020	Yes	Yes	No
country conten	<b>F</b> 6	Morningstar Equity Style Box Change	DWS Invest CROCI Europe	Multiple Investments	01/23/2020	Yes	Yes	No
	7	Morningstar Equity Style Box Change	BNPP E Equity Value Europe	Multiple Investments	01/23/2020	Yes	Yes	No
	8	Morningstar Equity Style Box Change	B & G Long Term Valuel S E	Multiple Investments	01/23/2020	Yes	Yes	No
	9	Morningstar Equity Style Box Change	Amundi Eds European En Va	Multiple Investments	01/23/2020	Yes	Yes	No
	10	Morningstar Equity Style Box Change	AMF Aktiefond Europa	Multiple Investments	01/23/2020	Yes	Yes	No
	11	Morningstar Equity Style Box Change	AXA Framlington Emerg Ma	Multiple Investments	01/23/2020	Yes	Yes	No
	12	Morningstar Equity Style Box Change	Threadneedle (Lux) Pan Eu	Multiple Investments	01/23/2020	Yes	Yes	No
	13	Morningstar Equity Style Box Change	Allianz Europe Equity Growt	Multiple Investments	01/23/2020	Yes	Yes	No
	14	Morningstar Equity Style Box Change	Fidelity Special Situations	Multiple Investments	01/23/2020	Yes	Yes	No
	15	Morningstar Equity Style Box Change	Alken European Opportuniti	Multiple Investments	01/23/2020	Yes	Yes	No
	16	Fund Manager Change	XT Europa EUR R01 T	Multiple Investments	01/23/2020	Yes	Yes	No
	17	Fund Manager Change	SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No
	18	Fund Manager Change	KBC En Ed Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
	19	Fund Manager Change	1PMorgan SAR European A	Multiple Investments	01/23/2020	Yes	Yes	No
	20	Fund Manager Change	Deka STOXX® Europe Stro	Multiple Investments	01/23/2020	Yes	Yes	No
	21	Fund Manager Change	DWS Invest CROCI Europe	Multiple Investments	01/23/2020	Vec	Yes	No
	22	Fund Manager Change	BNPP E Equity Value Europe	Multiple Investments	01/23/2020	Yes	Yes	No
	23	Fund Manager Change	B & G Long Term Valuel S F	Multiple Investments	01/23/2020	Yes	Yes	No
	24	Fund Manager Change	Amundi Eds European Ed Va	Multiple Investments	01/23/2020	Yes	Yes	No
	25	Fund Manager Change	AME Aktiefond Europa	Multiple Investments	01/23/2020	Yes	Yes	No
	26	Fund Manager Change	AXA Framlington Emerg Ma	Multiple Investments	01/23/2020	Yes	Yes	No
	27	Fund Manager Change	Threadneedle (Lux) Pan Fu	Multiple Investments	01/23/2020	Yes	Yes	No
>	28	Fund Manager Change	Allianz Europe Equity Growt	Multiple Investments	01/23/2020	Yes	Yes	No
ity/Credit Research	29	Fund Manager Change	Fidelity Special Situations	Multiple Investments	01/23/2020	Yes	Yes	No
la i l	30	Fund Manager Change	Alken European Opportuniti	Multiple Investments	01/23/2020	Vec	Yee	No
al Databases	31	Morningstar Fixed Income Style Box Ch	AT Europa FUR R01 T	Multiple Investments	01/23/2020	Yes	Yes	No
bal Databases	32	Morningstar Fixed Income Style Box Cha	ar SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No
formance Reporting	33	Morningstar Fixed Income Style Box Cha	KBC Eq Ed Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
et Allocation	34	Morningstar Fixed Income Style Box Cha	ar 10Morgan SAR European A	Multiple Investments	01/23/2020	Vec	Yee	No
tfolio Management	35	Morningstar Fixed Income Style Box Cha	ar Deka STOXX® Europe Stro	Multiple Investments	01/23/2020	Yes	Yes	No
falls Assistants	36	Morningstar Fixed Income Style Box Cha	ar DWS Invest CROCI Europe	Multiple Investments	01/23/2020	Yes	Yes	No
trollo Analysis	37	Morningstar Fixed Income Style Box Cha	ar BNPP E Equity Value Europe	Multiple Investments	01/23/2020	Yes	Yes	No
rkets	38	Morningstar Fixed Income Style Box Cha	ar B & G Long Term Valuel S F	Multiple Investments	01/23/2020	Yes	Yes	No
et Flows	39	Morningstar Fixed Income Style Box Cha	ar Amundi Eds European En Va	Multiple Investments	01/23/2020	Yes	Yes	No
sentation Studio	40	Morningstar Fixed Income Style Box Cha	AMF Aktiefond Europa	Multiple Investments	01/23/2020	Yes	Yes	No
k Model Analysis	41	Morningstar Fixed Income Style Box Cha	ar AXA Framlington Emerg Ma	Multiple Investments	01/23/2020	Yes	Yes	No
		the state of the state of the box care	4					

You are returned to the Alerts section and your rules were added to the Alert Rules page.

**Filing Alerts** let you know of any new Stock or Fund reports such as Annual Report, Prospectus, KIID (for funds), and much more.

In this exercise you will learn how to select an Investment List saved in Workspace, and how to general multiple alerts for the selected securities.

To create a Filing Alert, do the following:

- 1. Using the Security drop-down menu, click the Investment List section.
- 2. Select the Investment List labelled **Multiple Investments**, which you created during the <u>Working with Lists</u> exercise guide.
- Mote: If you did not complete this exercise, please select any other investment list containing funds.
- 3. Click on the side of the drop-down menu to close it.
- 4. Expand the Fund Filings section.
- 5. Select Annual Report, Factsheet, Prospectus and KIID.
- 6. Click **Save**.

Your Filing Alerts were added to the Alert Rules page.

Alerts							
Action	🔹 🏦 Export 👜 Print 🛛 Add 👻 🔟 Defa	ault Alert Settings View A	lert Rules 🔽				
	Alert Title	Security	Additional Information	Date Set	Email	Recurring	Auto Delete
1	New Filing - KIID	Allianz Europe Equity Grow	Multiple Investments	01/23/2020	Yes	Yes	No
2	New Filing - KIID	Fidelity Special Situations	Multiple Investments	01/23/2020	Yes	Yes	No
3	New Filing - KIID	Alken European Opportunit	Multiple Investments	01/23/2020	Yes	Yes	No
4	New Filing - Prospectus	XT Europa EUR R01 T	Multiple Investments	01/23/2020	Yes	Yes	No
5	New Filing - Prospectus	SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No
6	New Filing - Prospectus	KBC Eq Fd Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
7	New Filing - Prospectus	JPMorgan SAR European A	Multiple Investments	01/23/2020	Yes	Yes	No
8	New Filing - Prospectus	Deka STOXX® Europe Stro	Multiple Investments	01/23/2020	Yes	Yes	No
9	New Filing - Prospectus	DWS Invest CROCI Europe	Multiple Investments	01/23/2020	Yes	Yes	No
10	New Filing - Prospectus	BNPP E Equity Value Europe	Multiple Investments	01/23/2020	Yes	Yes	No
11	New Filing - Prospectus	B & G Long Term Valuel S I	Multiple Investments	01/23/2020	Yes	Yes	No
12	New Filing - Prospectus	Amundi Fds European Eq V	Multiple Investments	01/23/2020	Yes	Yes	No
13	New Filing - Prospectus	AMF Aktiefond Europa	Multiple Investments	01/23/2020	Yes	Yes	No
14	New Filing - Prospectus	AXA Framlington Emerg Ma	Multiple Investments	01/23/2020	Yes	Yes	No
15	New Filing Drespectus	Throadpoodlo (Luve) Dan Fu	Multiple Investments	01/22/2020	Voc	Vec	No

# Exercise 4: Creating a Filings Alert

**Exercise 5: Editing an Alert** 

Rule

Once rules have been created, you can still apply changes to your notification settings.

To edit a rule, do the following:

- 1. Within the Alerts section, ensure you selected the **Alert Rules** view.
- 2. Double-click on one of the rules. The Edit Security Alert dialogue box opens.
- 3. Select Make Alert Inactive after First Trigger.



#### 4. Click Save.

The notification changes have been saved.

Alerts	Alerts								
Action	n 🔹 🏦 Export 👜 Print 🛛 Add 👻 🔟 De	ault Alert Settings View	Alert Rules 🗸						
	Alert Title	Security	Additional Information	Date Set	Email	Recurring	Auto Delete		
1	New Filing - KIID	XT Europa EUR R01 T	Multiple Investments	01/27/2020	Yes	No	No		
2	New Filing - KIID	SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No		

To delete a rule, do the following:

- 1. Select the checkbox to the left of the rule you want to delete.
- 2. From the toolbar, click **Action > Delete**.

Alerts									
Action 🗸 🏦 Export 🍓 Print 🛛 Add 👻 🔟 Default Alert Settings View 🗍									
Delete		]	:	Security	4				
✓ 1	New Filing - K	New Filing - KIID		XT Europa EUR R01 T	r				
2	New Filing - KIID			SEB European Equity A					
3	New Filing - K			KBC En Ed Buyback Eur	ope I				

3. On the prompt, click **OK**.



Your rule has been deleted.

Exercise 6: Deleting an Alert Rule