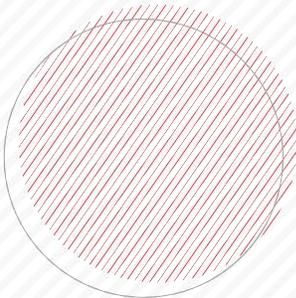
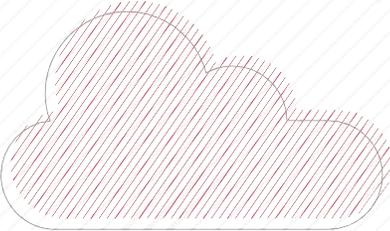


Morningstar Direct Training Guide

Alerts



MORNINGSTAR Direct



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Contents

ALERTS	5
OVERVIEW	5
EXERCISE 1: DEFAULT ALERT SETTINGS	6
EXERCISE 2: CREATING A PRICE ALERT	7
EXERCISE 3: CREATING A MORNINGSTAR ALERT	8
EXERCISE 4: CREATING A FILINGS ALERT	10
EXERCISE 5: EDITING AN ALERT RULE	11
EXERCISE 6: DELETING AN ALERT RULE	11

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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:

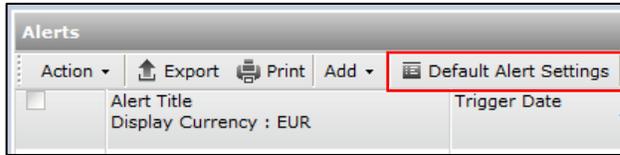
- ▶ Price alerts
- ▶ Morningstar alerts
- ▶ Filings alerts

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

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.

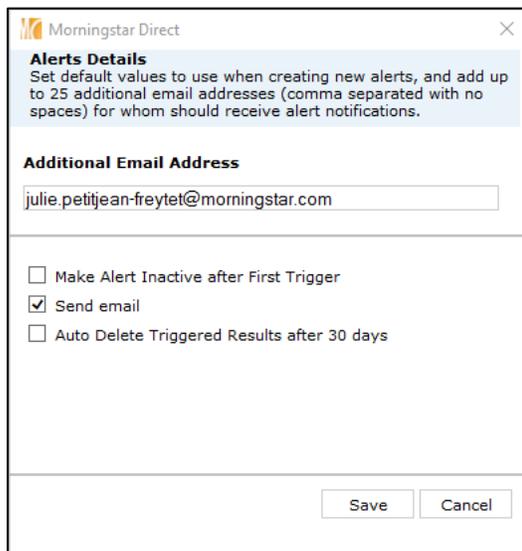


Note how your email address is already populated in the Additional Email Address field. You are able to add up to 25 additional email addresses separated with a comma.

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.
Note: 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.



6. Click **Save**.

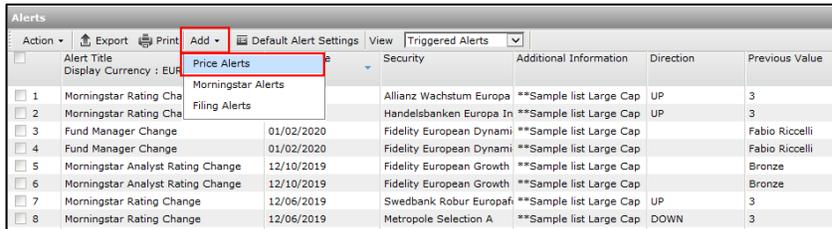
Exercise 1: Default Alert Settings

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.

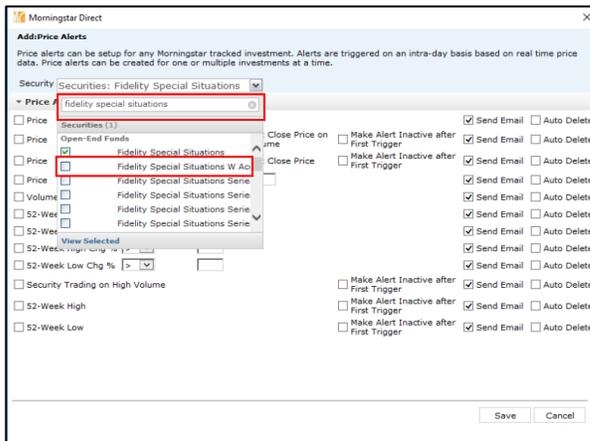
Exercise 2: Creating a Price Alert

To set up a Price alert, do the following:

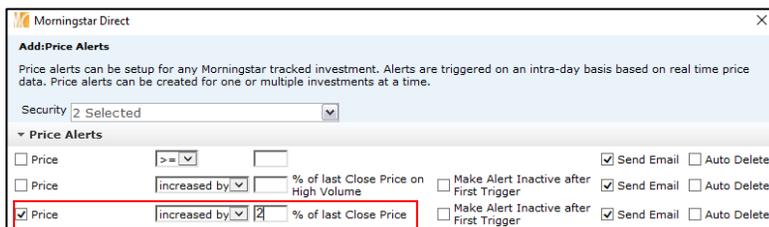
1. From the toolbar, click **Add > Price alert**. The **Add: Price Alerts** dialogue box opens.



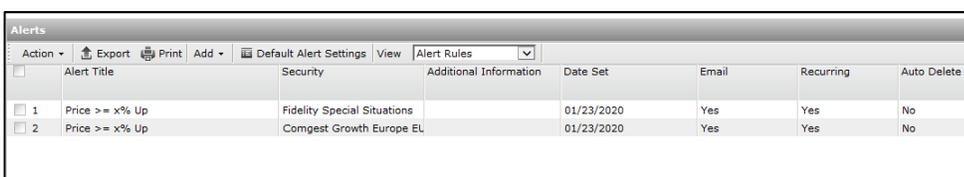
2. Using the **Security** drop-down menu, use the Search field to look for **Fidelity Special Situations**.
3. Select the checkbox to the left of the fund name to select it.



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



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.



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

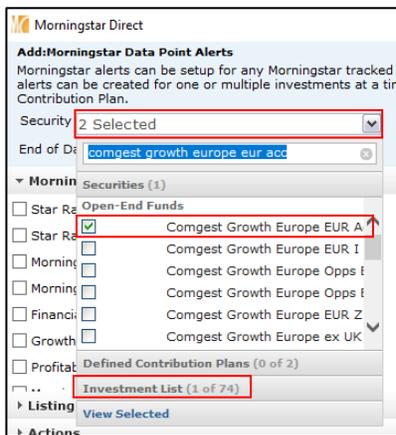
Exercise 3: Creating a Morningstar Alert

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:

1. 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 [Working with Lists](#) exercise guide.
 - ☞ **Note:** 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.



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**.

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

The screenshot shows the Morningstar Direct Alerts section. The interface includes a navigation pane on the left with categories like Home, Alerts, Filings, and Learning Center. The main area displays a table of alert rules with columns for Alert Title, Security, Additional Information, Date Set, Email, Recurring, and Auto Delete. The table contains 41 rows of data, all with a date set of 01/23/2020. The rules are categorized into Morningstar Equity Style Box Change, Fund Manager Change, and Morningstar Fixed Income Style Box Char.

Alert Title	Security	Additional Information	Date Set	Email	Recurring	Auto Delete
1 Morningstar Equity Style Box Change	XT Europa EUR R01 T	Multiple Investments	01/23/2020	Yes	Yes	No
2 Morningstar Equity Style Box Change	SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No
3 Morningstar Equity Style Box Change	KBC Eq Fd Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
4 Morningstar Equity Style Box Change	JPMorgan SAR European A	Multiple Investments	01/23/2020	Yes	Yes	No
5 Morningstar Equity Style Box Change	Deka STOXX Europe Stro	Multiple Investments	01/23/2020	Yes	Yes	No
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 Value S E	Multiple Investments	01/23/2020	Yes	Yes	No
9 Morningstar Equity Style Box Change	Amundi Fds European Eq Vi	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 Eui	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	Aiken European Opportunit	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 Eq Fd Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
19 Fund Manager Change	JPMorgan 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	Yes	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 Value S E	Multiple Investments	01/23/2020	Yes	Yes	No
24 Fund Manager Change	Amundi Fds European Eq Vi	Multiple Investments	01/23/2020	Yes	Yes	No
25 Fund Manager Change	AMF 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 Eui	Multiple Investments	01/23/2020	Yes	Yes	No
28 Fund Manager Change	Allianz Europe Equity Growt	Multiple Investments	01/23/2020	Yes	Yes	No
29 Fund Manager Change	Fidelity Special Situations	Multiple Investments	01/23/2020	Yes	Yes	No
30 Fund Manager Change	Aiken European Opportunit	Multiple Investments	01/23/2020	Yes	Yes	No
31 Morningstar Fixed Income Style Box Char	XT Europa EUR R01 T	Multiple Investments	01/23/2020	Yes	Yes	No
32 Morningstar Fixed Income Style Box Char	SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No
33 Morningstar Fixed Income Style Box Char	KBC Eq Fd Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
34 Morningstar Fixed Income Style Box Char	JPMorgan SAR European A	Multiple Investments	01/23/2020	Yes	Yes	No
35 Morningstar Fixed Income Style Box Char	Deka STOXX Europe Stro	Multiple Investments	01/23/2020	Yes	Yes	No
36 Morningstar Fixed Income Style Box Char	DWS Invest CROCI Europe	Multiple Investments	01/23/2020	Yes	Yes	No
37 Morningstar Fixed Income Style Box Char	BNPP E Equity Value Europe	Multiple Investments	01/23/2020	Yes	Yes	No
38 Morningstar Fixed Income Style Box Char	B & G Long Term Value S E	Multiple Investments	01/23/2020	Yes	Yes	No
39 Morningstar Fixed Income Style Box Char	Amundi Fds European Eq Vi	Multiple Investments	01/23/2020	Yes	Yes	No
40 Morningstar Fixed Income Style Box Char	AMF Aktiefond Europa	Multiple Investments	01/23/2020	Yes	Yes	No
41 Morningstar Fixed Income Style Box Char	AXA Framlington Emerg Ma	Multiple Investments	01/23/2020	Yes	Yes	No

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

Exercise 4: Creating a Filings Alert

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 [Working with Lists](#) exercise guide.

Note: 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**.

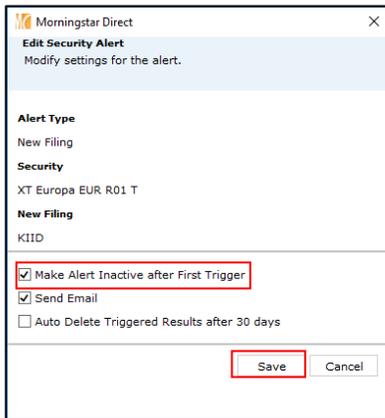
Your Filing Alerts were added to the Alert Rules page.

Alerts							
Action	Export	Print	Add	Default Alert Settings	View	Alert Rules	
Alert Title	Security	Additional Information	Date Set	Email	Recurring	Auto Delete	
<input type="checkbox"/>	1 New Filing - KIID	Allianz Europe Equity Growth	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	2 New Filing - KIID	Fidelity Special Situations	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	3 New Filing - KIID	Alken European Opportunities	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	4 New Filing - Prospectus	XT Europa EUR R01 T	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	5 New Filing - Prospectus	SEB European Equity A	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	6 New Filing - Prospectus	KBC Eq Fd Buyback Europe	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	7 New Filing - Prospectus	JPMorgan SAR European A	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	8 New Filing - Prospectus	Deka STOXX® Europe Sto	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	9 New Filing - Prospectus	DWS Invest CROCI Europe	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	10 New Filing - Prospectus	BNPP E Equity Value Europe	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	11 New Filing - Prospectus	B & G Long Term Value S E	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	12 New Filing - Prospectus	Amundi Fds European Eq V	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	13 New Filing - Prospectus	AMF Aktiefond Europa	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	14 New Filing - Prospectus	AXA Framlington Emerg Ma	Multiple Investments	01/23/2020	Yes	Yes	No
<input type="checkbox"/>	15 New Filing - Prospectus	Thoresen Fds (Lux) Res Fu	Multiple Investments	01/23/2020	Yes	Yes	No

Once rules have been created, you can still apply changes to your notification settings. To edit a rule, do the following:

Exercise 5: Editing an Alert Rule

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**.

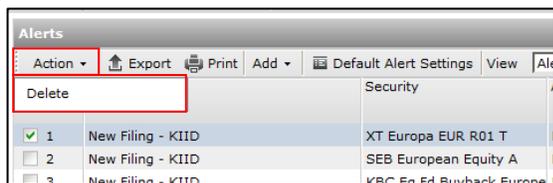
The notification changes have been saved.

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

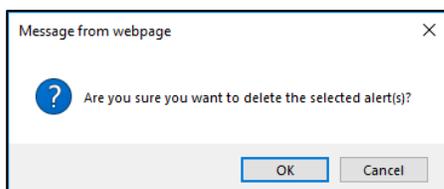
To delete a rule, do the following:

Exercise 6: Deleting an Alert Rule

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



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



Your rule has been deleted.