

Morningstar Direct

Technical Specifications and Installation Procedures

Morningstar Direct is a comprehensive investment intelligence platform that provides access to investment data, research, analytics, portfolio analysis, and reporting capabilities across a wide range of asset classes and investment types.

Architecture

Morningstar Direct is built on a distributed, cloud-based multi-tier architecture designed for high performance, scalability, availability, and interoperability. The platform leverages modern cloud infrastructure to dynamically scale resources and support global client demand.

The application is modular and service-oriented, with capabilities exposed through secure, standards-based interfaces such as HTTPS APIs. This design enables independent evolution of services while maintaining seamless integration across the platform. Data processing and analytics workloads are distributed across specialized services to efficiently support portfolio analysis, reporting, and data access.

The use of resilient, redundant cloud infrastructure enhances system reliability, fault tolerance, and overall availability.

Investment Data

Investment data is delivered through Morningstar-hosted services and is updated throughout the day. Frequently accessed information may be cached to improve application performance and responsiveness. Access to production systems and data is restricted to authorized personnel in accordance with Morningstar security policies.

Security

Morningstar employs administrative, technical, and physical safeguards designed to protect customer information and support the confidentiality, integrity, and availability of its services. Data transmitted between Morningstar Direct and Morningstar-hosted services is encrypted using industry-standard security protocols.

Access to production systems and customer data is restricted to authorized personnel based on business need and is governed by established access control processes. Systems are continuously monitored, maintained, and updated as part of Morningstar's operational and security practices.

Infrastructure is designed with resiliency and availability in mind to support reliable service delivery.

Back-Up and Recovery

Morningstar's production systems are hosted in secure cloud environments with appropriate access controls, monitoring, and resiliency measures. Data is backed up and protected in accordance with business continuity and disaster recovery practices designed to support service reliability and recovery objectives. Backup and recovery procedures are regularly reviewed and tested, and access to backup data is restricted to authorized personnel.

Platform Requirements

Processor

- ▶ Intel or AMD (x86/x64); 1.5 GHz or faster (minimum)
- ▶ Intel or AMD multi-core; 2.0 GHz or faster (recommended)

Memory

- ▶ 4 GB (minimum)
- ▶ 8 GB (recommended)

Disk Space

- ▶ 2 GB available (minimum)
- ▶ 4 GB available (recommended)
- ▶ 4 GB SSD available (best performance)

Operating System

- ▶ Windows 11

Additional Tools/Plug-ins

- ▶ Google Chrome 109 or higher
- ▶ Mozilla Firefox 115 or higher
- ▶ Microsoft Edge 109 or higher
- ▶ Microsoft Office 2016 (minimum), Microsoft 365 (recommended)
- ▶ Adobe Acrobat Reader XI or higher
- ▶ Microsoft Edge WebView2 version 104 or above
- ▶ Microsoft .NET Framework* 4.6.1 (required)
- ▶ Microsoft .NET Framework* 4.7 (required for Excel Add-In)
- ▶ Microsoft .NET Framework* 4.8 (required for Presentation Studio)

*Note: .NET 5 and later do not replace or satisfy Microsoft .NET Framework requirements.

The versions listed above must be installed where required.

Internet Connection

- ▶ A stable internet connection is required to access Morningstar Direct and associated Morningstar-hosted services.

Contact Information

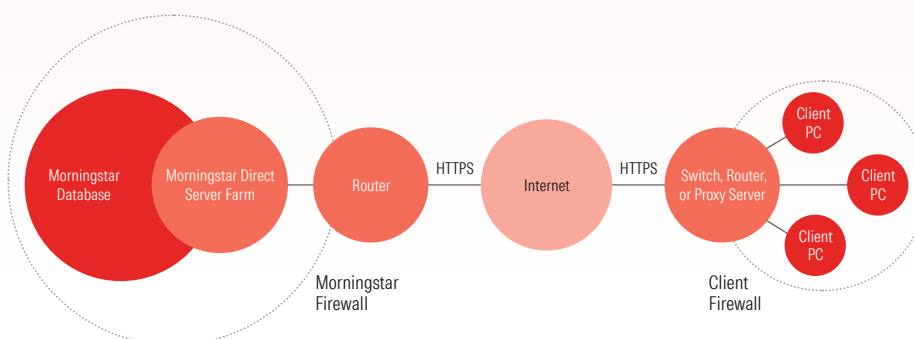
View our list of regional support phone lines here:

https://directserverside.morningstar.com/directhelp/General/Contact_Us.htm

Email us: MorningstarDirect@morningstar.com

Network Architecture

Morningstar Direct securely accesses Morningstar-hosted data services. Investment data is updated throughout the day, and frequently accessed information may be cached to improve application performance and responsiveness.



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Login Information

Access to Morningstar Direct requires multi-factor authentication (MFA) and is supported through either a unique user ID (email address) and password or a supported Single Sign-On (SSO) integration where enabled. User accounts can be deactivated immediately upon request. Unsuccessful login attempts are logged and monitored. When a new user account is created, an email is sent to the user to establish their password.

Password Requirements

- ▶ Minimum length: 8 characters
- ▶ Must differ from the user ID
- ▶ Encrypted in transit and hashed at rest
- ▶ Password expiration is not enforced
- ▶ Password reuse is permitted but not recommended

User sessions automatically expire after 24 hours of inactivity. Concurrent logins to the same session are not permitted.

Morningstar Installation Procedures

Desktop Client Install Details

Installation creates folders under C:\Program Files(x86) and C:\ProgramData by default, installing the following components:

- ▶ Prerequisite files
- ▶ Morningstar Direct related font files
- ▶ Main executable modules
- ▶ Auto-update module
- ▶ System files (see below for more details)
- ▶ Presentation Studio
- ▶ Microsoft .NET Framework 4.8

Installed System Files

Morningstar Direct installs (or updates) the following system files in the target computer:

MFC140U.DLL	14.50.35719.0
vcruntime140.dll	14.50.35719.0
ucrtbase.dll	10.0.26100.8246
gdipplus.dll	10.0.26100.8246
FinderLibv21.dll	
Morningstar TTF font collection	

Desktop Installation Methods

Morningstar Direct can be installed using either the standard installer (recommended) or MSI packages for managed desktop deployments. Installation requires Windows Installer 3.1 or later.

Recommended Installation

Download and run:

<https://do-package.morningstar.com/direct/morningstardirectsetup.exe>

The installer validates system requirements, installs required components, and downloads any additional files needed.

MSI Installation

For managed or enterprise software deployments, install the prerequisite and then application MSI packages:

MSI Step 1:

Prerequisites Package

<https://do-package.morningstar.com/direct/prerequisite.msi>

MSI Step 2:

Direct Application Package

<https://do-package.morningstar.com/direct/direct.msi>

Morningstar Excel Add-In

The Morningstar Excel Add-In is installed separately. It can be accessed from within Morningstar Direct or downloaded from:

<https://excelapi.morningstar.com/>

Firewall/Proxy Server Configuration

Clients should configure firewall and proxy rules using the Fully Qualified Domain Names (FQDNs) listed below. The associated IP addresses are dynamic and may change over time; therefore, fixed IP addresses should not be used for allow-listing.

Required URLs:

advtools.morningstar.com	globalquote.morningstar.com
morningstardirect.morningstar.com	doc.morningstar.com
admainnew.morningstar.com	screener.morningstar.com
oa.morningstar.com	adcm.morningstar.com
autodiscover.morningstar.com	gladmainnew.morningstar.com
analysis.morningstar.com	awrd.morningstar.com
analysisreport.morningstar.com	directserverside.morningstar.com
portfolios.morningstar.com	cef.morningstar.com
investors.morningstar.com	ajax.aspnetscdn.com
excelapi.morningstar.com	video.com
gladpas.morningstar.com	fvideo.com
addin.morningstar.com	fast.fonts.net
portfolioanalysis.morningstar.com	akamai.com
gladcrm.morningstar.com	ssl.google-analytics.com
gladtoolnew.morningstar.com	www.google-analytics.com
assetallocation.morningstar.com	fonts.googleapis.com
qt.morningstar.com	ajax.googleapis.com
elearning.easygenerator.com	presentationstudio.morningstar.com
direct.morningstar.com	fundflows.morningstar.com
quotespeed.morningstar.com	etfs.morningstar.com
pullqs.morningstar.com	login-prod.morningstar.com
quotes.morningstar.com	images.mscomm.morningstar.com
im.morningstar.com	rtqim.morningstar.com
mschart.morningstar.com	mwc-cdn.morningstar.com
financials.morningstar.com	ctrsi-prod.pf1779.eas.morningstar.com
im.morningstar.com	bi.morningstar.com
uim-session-manager-awsprod.morningstar.com	voila.morningstar.com
insiders.morningstar.com	*.do41368.eas.morningstar.com
	www.morningstar.com

FTP/SFTP Server Access

For clients who require Morningstar to exchange files via FTP or SFTP, firewall rules should allow connections from the following Morningstar egress IP addresses:

107.22.234.123	34.238.71.25
3.228.196.111	34.250.81.188
34.193.75.89	99.80.169.246
34.196.130.73	99.81.164.197

The recipient FTP/SFTP server must also be configured to accept connections from these addresses and allow the required service port(s) and passive port range, where applicable.