

Morningstar Direct

Morningstar Direct helps you turn investing vision into invested reality. It's a global investment analysis platform that unites Morningstar's data and institutional research with private and third-party content, rigorous analytics, data-science capabilities, and productivity tools. That makes it easy to find meaning in financial information, then communicate those insights with customized reports, presentations, and visualizations designed to be clear, concise, and compelling.

Reporting

Showcase who you are and what you do best with product comparisons, examples that illustrate the value you add, and communications that tell the story of your investments.

- ▶ Presentation Studio
- ▶ Investment Detail Report
- ▶ Standard Morningstar Reporting: Managed Investment Report, Sustainability Report, Carbon Risk Report

Portfolio Management & Monitoring

Build Custom Portfolios & Client Accounts including Custom Benchmarks through Portfolio Management.

- ▶ Investment Detail Reports
- ▶ Presentation Studio
- ▶ Advanced Risk Modeling
- ▶ Portfolio Analysis

Research & Due Diligence

Get proprietary datasets, forward-thinking research, and performance and risk analysis that empower you, help you crystallize your vision, and manage regulatory requirements. We bring transparency to the global investment landscape. That means clients get everything they need to distill complexity into actionable insights and create compelling reports that drive home the value of their analysis.

- ▶ More than 13,000 data points
- ▶ Morningstar Research Portal
- ▶ Direct Blog
- ▶ Notebooks + Analytics Lab
- ▶ Asset Flows + Asset Flows Forecast
- ▶ Fixed Income Asset Exposure
- ▶ Advanced Risk Modeling
- ▶ Attribution
- ▶ Sustainability Hub
- ▶ Custom and Standard Scorecarding

Morningstar Advisor Workstation

Morningstar Advisor Workstation has the tools and research you need to optimize your most critical advisor workflows—from one platform. Attract new clients, drive better investor outcomes through accessible financial planning capabilities, comply with current and future regulatory needs, and digitally quantify decision trade-offs.

Client and Prospective Client Engagement

Build trust with visuals and reports that bring investment decisions to life.

- ▶ Investment Proposal Tool
- ▶ Scenario Builder
- ▶ FINRA-reviewed client facing reports
- ▶ Morningstar Portfolio Risk Score

Investment Planning

Help your clients meet their goals with a modern toolkit that lets you match investment strategies to goals and create reports that illustrate the value of your advice

- ▶ Goal Bridge
- ▶ Morningstar Risk Ecosystem
- ▶ Morningstar Risk Tolerance Questionnaire (RTQ)

Portfolio Management & Monitoring

See client information in a single interface designed for detailed portfolio analysis and ongoing monitoring.

- ▶ Clients & Portfolios
- ▶ Morningstar for Advisors Mobile App
- ▶ Overnight Batch

Research & Due Diligence

Comply with changing regulations, align to internal policies, and integrate Morningstar data into your daily research process.

- ▶ Standard & Advanced investment data in US
- ▶ Model Exchange
- ▶ Wealth Forecast