

# Direct Advisory Suite for Raymond James

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## Data Universes

**Global:** Mutual Funds, ETFs, CE, (Preferred) Stocks, Bonds, Separate Accounts, Models, Insurance & Pension Funds

**US:** Money Market, 529 Plans & Portfolios, CITs, Variable Annuities & Subaccounts, Variable Life & Subaccounts

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## Research & Due Diligence

Alerts & Watchlists

Interactive Charting

Morningstar Analyst Research

Advanced Screener with Save

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## Client Engagement & Prospect Engagement

**FINRA-compliant client-facing reports including:** Portfolio X-Ray, Portfolio Comparison, Investment Detail Report, Stock Intersection, Snapshot Report

Morningstar Portfolio Risk Score

Scenario Builder

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## Portfolio Management & Monitoring

Clients & Groups Dashboard

**Portfolio Construction:** Set allocation preferences, Side-by-side risk view, Collapsed attribute & fee settings

Interactive Portfolio Analysis

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## Investment Planning

Investment Proposal Tool

Morningstar Risk Tolerance Questionnaire

Morningstar Risk Ecosystem

Portfolio Optimization Tool

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## Mo (AI Companion)

**24/7 AI chatbot & Digital Assistant includes:** Morningstar Data-Sourced Responses, Talking Point Generation, Relevant Article Sourcing and more

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## Integrations

Intelligent Import, Automated Overnight Batch, ByAllAccounts

Third Party: MoneyGuidePro, eMoney, Redtail, Albridge, Right Capital

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## Subscription Term:

Annual

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## Learn More:

<https://www.morningstar.com/business/try/raymond-james>