

Create concise investment reports with Morningstar Direct

An illustrated guide for investment teams.



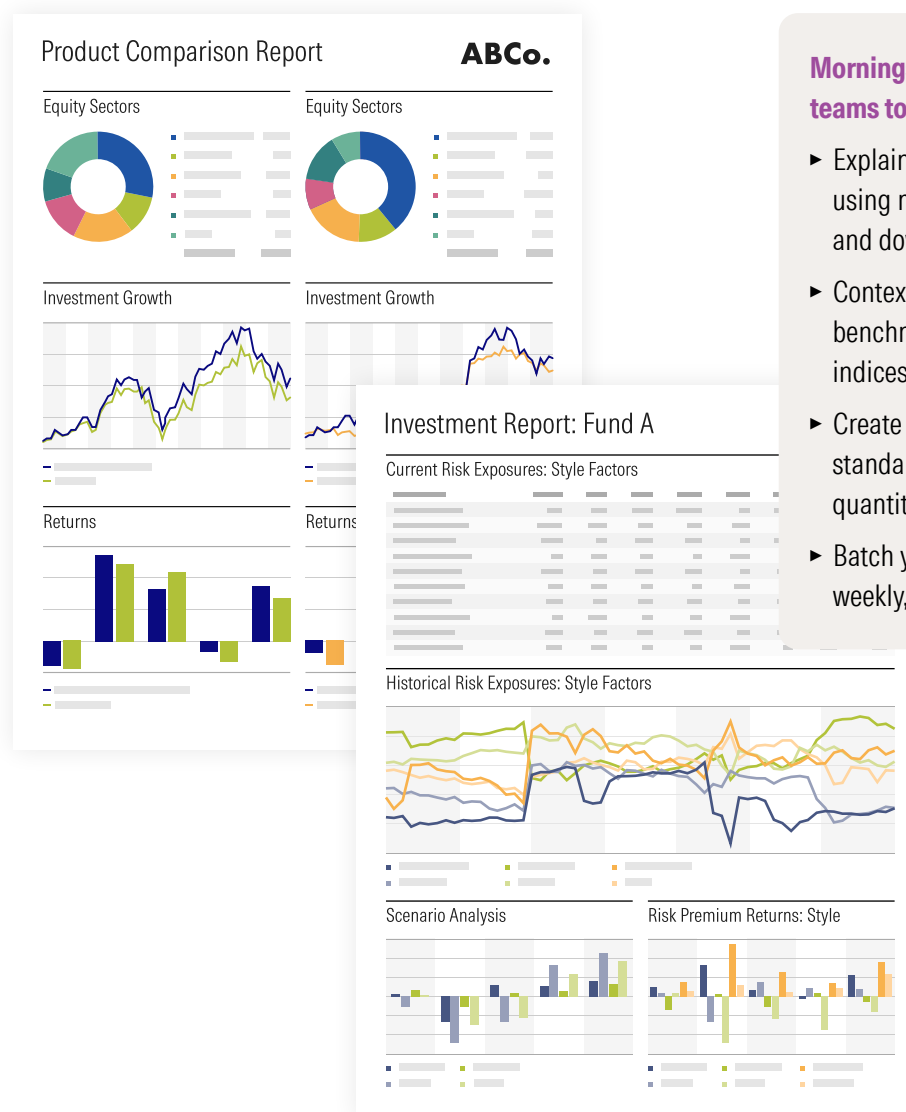
What makes reporting difficult or slow?

Exceptional investment reports tell clear stories. Morningstar helps you overcome the variety of obstacles that slow down the process and cloud your message. This guide will zoom in on specific features of reports and how to make them stand out for your stakeholders.



How to improve the process and output

Impactful investment reporting is precise, insightful, and fast. Throwing every metric and stat you can dig up into a report isn't effective. Neither is focusing too narrowly on returns or some other singular data point. Whether you're managing institutional portfolios or guiding individual clients, your stakeholders expect context that drives confident decisions. Morningstar can help you curate and distribute that context quickly, and in doing so, make investment reporting a strategic advantage of your firm.

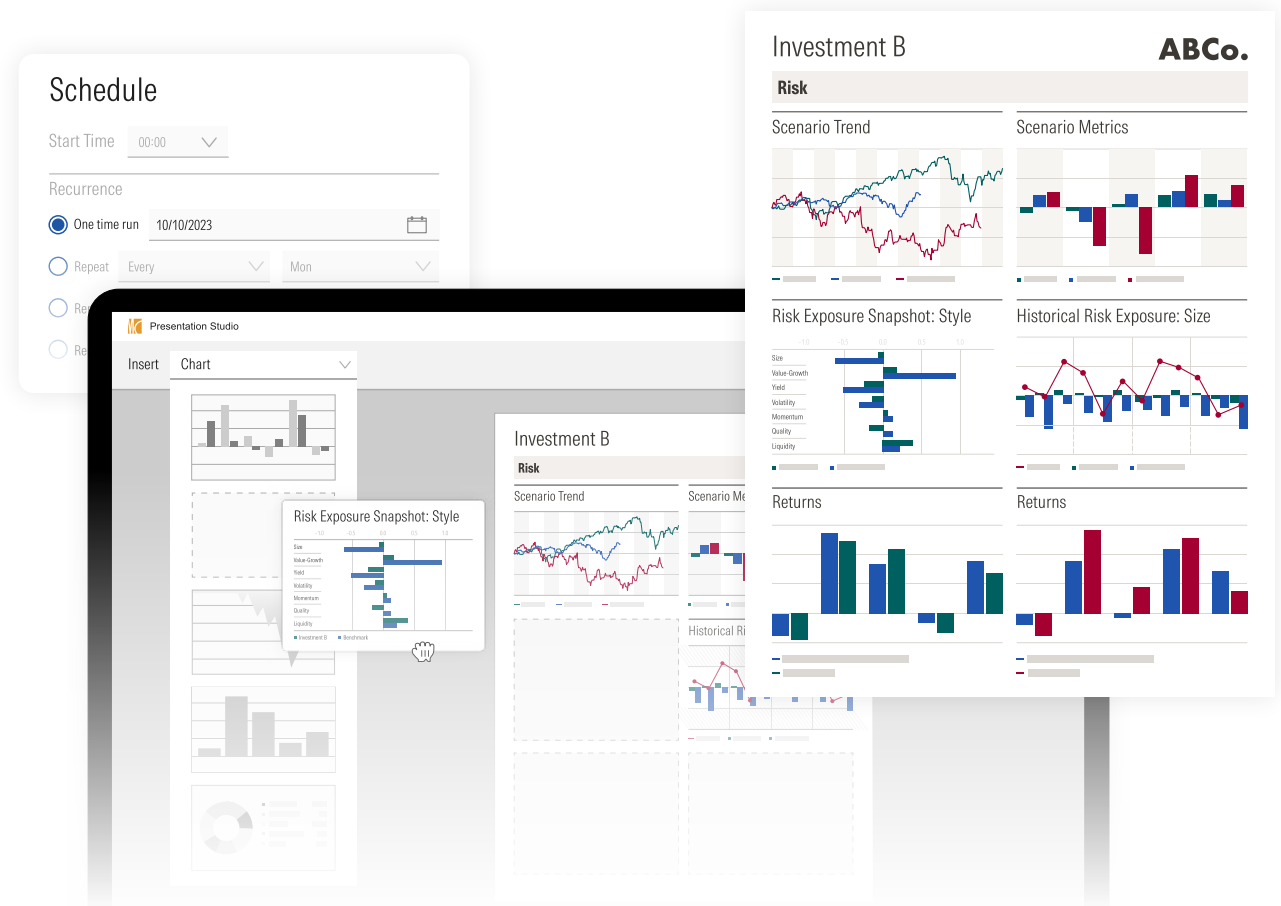


Morningstar empowers investment teams to:

- Explain why something happened using metrics like excess returns and downside capture
- Contextualize results by benchmarking against peers, indices, or prior periods
- Create scorecards using a variety of standard and custom qualitative and quantitative factors
- Batch your reports for quarterly, weekly, or daily distribution

Start with customizable templates

Morningstar Direct's Presentation Studio empowers investment teams to turn complex data into compelling, client-ready narratives—fast. With customizable templates, you can streamline report creation and deliver clear product comparisons, performance summaries, and presentations with ease. Add your firm's logo and branding to reinforce consistency and credibility, helping you communicate with clarity and confidence every time.



Present actionable data

Your reports need clear attribution, peer comparisons, and risk insights to truly convey what's driving results—and what to do next. Focus on the data points that capture trends or outliers in your analysis, keeping your reports centered on the primary narrative. Charts and tables can draw attention to the key takeaways of a report.



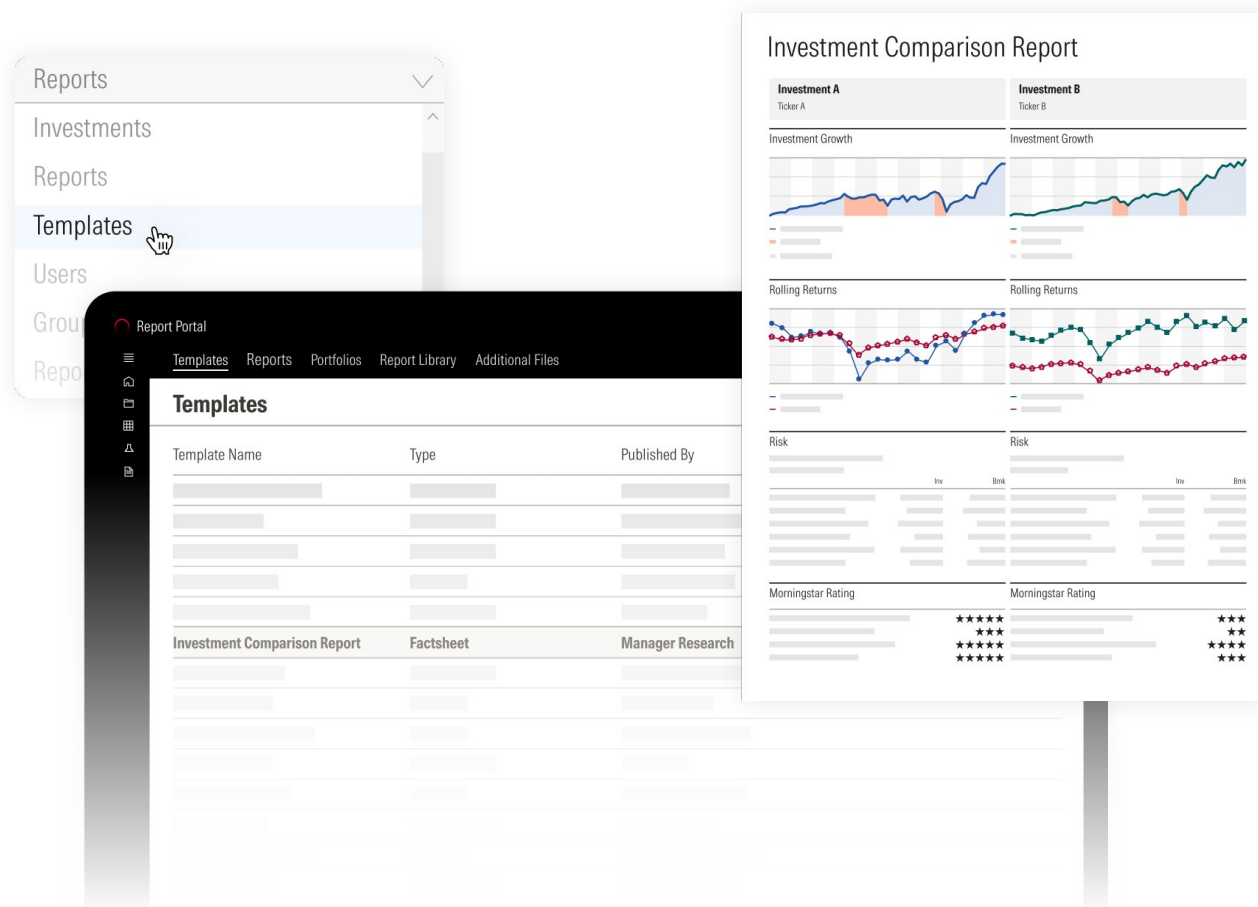
Consider providing the following context:

- ▶ Use suitable time frames to help your audience judge consistency and cyclicalities.
- ▶ Illustrate a product's risk profile with metrics.
- ▶ Dig into the potential drivers for performance changes.
- ▶ Compare similar investments using relative performance indicators like excess return percentage, tracking error percentage, or upside and downside capture.
- ▶ Compare your strategy against index trackers.
- ▶ Explain liquidity through a profile and expected outcomes.
- ▶ Highlight changes to product characteristics like style and strategy.

Run your reports anytime, anywhere

Generate presentation-ready reports on demand using your pre-established templates with Report Portal, a paid addition to Morningstar Direct. When your team is in the field, they can choose the investments and benchmarks they want to feature, tailoring reports for specific needs while meeting compliance requirements. Back at the office, you can quickly gather some internal business intelligence by observing which templates are making a difference for your firm.

- ▶ Run customized, strategy-aligned investment report templates
- ▶ Build your brand, generate business, and expand your reach with unified messaging across sales teams, asset managers, and consultants.



How Morningstar can help

Data accuracy is critical—don't let it slow you down. When you can't trust your data, you lose time filling in gaps or verifying information.

The Morningstar Direct platform contains a variety of features that help investment teams create reports faster and with greater impact.

Included with Morningstar Direct		Paid add-on
Presentation Studio*	Performance Reports*	Report Portal
Use Morningstar data and analytics to distill complex investment information	Assign benchmarks, define data, and perform ranking analysis	Run customized, strategy-aligned investment report templates build your brand, generate business, and expand your reach
Custom-branded reports, product comparisons	Evaluate, compare, and communicate portfolio performance in a structured, visual format	Free up time and reduce bottlenecks with mobile-friendly reports and convenient access 24/7

*Report and data distribution requires additional license.



Start producing better investment reports today

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