MORNINGSTAR DIRECT CERTIFICATION

CERTIFICATION PROGRAMS FOR FINANCE STUDENTS

LEVELS OF CERTIFICATION AND EXAM PREPARATION

- Study material given before taking the exams
  - The exams are reasonably short
  - All of the information that you need to know for the exams is in the study materials
- Pass the exams with at least a 75%
- Each capability section has its own Exam
  - The exams are more like quizzes to see how much you learned from the guide
- Each exam can be retaken as needed to achieve the 75%
- After you are certified, a new larger library of opportunities for training will arise
- To become Morningstar Direct certified, you must pass all sections
- The different sections are:
  1. Morningstar Direct Cloud Home Page & Navigation, Lists & Screens, Grid & Column Sets
  2. User Preferences, Creating Lists & Searches, Data Sets & Calculations
  3. Performance Reporting, Scorecard, Excel API
  4. Presentation Studio, Asset Flows, Note Manager
  5. Portfolio Management, Portfolio Analysis & Equity Attribution
  6. Custom Database, Asset Allocation, Total Portfolio Attribution

ABOUT LIVE SESSIONS

- There are additional online live sessions that you can register for to help prepare you for the certification program.
  - **These live sessions are listed below:**
    - Monitor & Evaluate Investment Line-Ups
    - Create Custom Scores to Screen Investments
    - Create Compelling Custom Presentations
    - Get Insight on Investor Trends
    - Identify the Impact of Investment Decisions
    - Monitor Portfolios & Markets in Real-Time
    - Identify the Impact of Strategic Asset Allocation Decisions
    - Determine Optimal Asset Allocation Strategies
    - Create Custom Portfolios
- Maximize Morningstar Data in Microsoft Excel
- The following slides give a little bit of information on the live sessions.

LIST OF AVAILABLE LIVE SESSIONS

(Can be accessed at this link http://gladmainnew.morningstar.com/clientcomm/IntlDirect0113.html)

- **Monitor & Evaluate Investment Line-Ups**
  - Learn how to streamline and simplify your performance reporting process for various investments across multiple asset classes and custom groups. Select peer groups, specify performance periods, and customize benchmarks to monitor your results.
- **Create Custom Scores to Screen Investments**
  - Learn how to build customizable, point-weighted methodologies to grade how well the investment strategies within a peer group meet their objectives.
- **Create Compelling Custom Presentations**
  - Learn how to easily create professional, custom-branded fact sheets and presentations, incorporating your company's logos, colors, fonts, and custom disclaimers. Start with pre-built Morningstar templates or design your own, using data from Morningstar's database or your imported proprietary investment data.

CONTINUED LIST OF LIVE SESSIONS

- **Identify the Impact of Strategic Asset Allocation Decisions**
  - Learn how to produce a total portfolio attribution report to identify excess return based on asset allocation and manager selection. Examine the outcome of deliberate deviations from policy weights and measure the manager-picking skill in the aggregates, or by asset class or investment style.
- **Determine Optimal Asset Allocation Strategies**
  - Learn how to create optimal asset allocation policies for specific investment goals. Develop asset class assumptions, identify your target portfolio(s), and forecast future performance.
- **Create Custom Portfolios**
  - Learn how you can use the portfolio management workspace to build model portfolios and import private investments. Apply your custom portfolios to the various product areas of Morningstar Direct to conduct further analysis.

CONTINUED LIST OF LIVE SESSIONS

- **Get Insight on Investor Trends**
  - Take advantage of comprehensive, worldwide asset flow data to assess investor trends and perform competitive analysis, develop new products, and market managed investment products. Start with aggregated data, drill down to specific findings, and export data for further analysis.
- **Maximize Morningstar Data in Microsoft Excel**
  - Learn how to retrieve data points from the Morningstar databases and load them into Microsoft Excel for further calculation, formatting, or charting. Take advantage of the thousands of widely used data points available for each investment type.
- **Identify the Impact of Investment Decisions**
  - Learn how to create an equity attribution report of your portfolio or your competition's portfolio to decompose the excess return and identify the impact of investment decisions.
- **Monitor Portfolios & Markets in Real-Time**
  - Learn how to use real-time portfolio analysis to help monitor your portfolio and make better investment decisions.