

# Morningstar® Investment Research Center<sup>SM</sup>

## New Features and Enhancements

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The new and improved Morningstar Investment Research Center available April 2021!

In addition to providing access to Morningstar's proprietary data and research to help empower investor success, the

updated database will allow investors access to even more research and thought leadership. While we've worked to ensure that we're providing a more stable platform with an updated design and user interface, we're maintaining much of the navigation to which users are accustomed.

### New Research and Reports

#### Funds

- ▶ Global Fund Report: The Global Fund Report focuses on the most relevant data surrounding the Morningstar Analyst Rating for Funds, which combines qualitative (analyst-driven) and quantitative (numerically based) factors focused on three key pillars: Process, People, and Parent. The Reports include additional analysis about each pillar and a wealth of graphics, data, and other statistics that showcase the most important information about a fund over time and in the appropriate context.
- ▶ Quantitative Ratings and Analysis:
  - ▷ The Quantitative Rating is a machine learning model that's meant to mimic how Morningstar analysts would rate a fund.
  - ▷ The Quantitative Analysis is automatically generated, and it is designed to communicate the reasons for, and justifications behind, a fund's quantitative rating. The analysis is designed to replicate the style of the reports that Morningstar analysts publish. The analysis is refreshed monthly.
- ▶ Sustainability
  - ▷ Fund Sustainability Report: the report provides a breakdown of a fund's Sustainability Rating and how well the portfolio holdings are managing their Environmental, Social, and Governance (ESG) Risk relative to the portfolio's Global Category peer group.
  - ▷ Carbon Report: The Morningstar Portfolio Carbon Impact report provides an in-depth look at a fund portfolios carbon risk and other carbon metrics to provide investors with a way to incorporate transition risk into their decisions.
  - ▷ Dedicated sub-tab with access to in-depth research studies we publish on Sustainability Investing and commentary on Sustainability.
- ▶ Target Date Fund Series Reports: reports are published for individual fund families offering target-date funds. The reports are designed to help investors make informed decisions when selecting a series of target-date funds.

#### Equities

- ▶ Company Report: The Equity Analyst Report focuses on the relevant data surrounding the Morningstar Rating for Stocks, which includes in-depth analysis and a wealth of graphics, data, and other statistics that showcase the most important information about a stock.
- ▶ Research Highlights: A weekly summary of stock ideas and developments in the companies we cover.

#### College Savings

- ▶ Annual 529 College Savings Plan Landscape Report: our annual report explores how the overall universe of 529 college savings plans addresses the challenges of ongoing tuition inflation, fee variation, new legislation, and a stressed economic environment, and how individual plans are distinguishing themselves.
- ▶ 529 College Savings Plans Detail Reports: one-page reports for individual 529 College Savings Plans that include an overview of the plan and in-depth analysis.

#### Education: Investing Classroom

- ▶ Updated course content in the existing Stocks, Funds, Portfolios, and Bonds modules.
- ▶ New modules on ETFs, Retirement, Planning, and Videos.
- ▶ Recommendation engine to curate a series of courses based on topic of interest and current investing knowledge.

#### Newly designed Tools

- ▶ Stock, Fund, and ETF Screeners: new design and functionality is more intuitive. The tools still offer a wealth of criteria for an investor to choose from when building a screen to narrow down investment options.
- ▶ Find Similar Funds: redesigned tool allows users to now select multiple funds to compare to their target fund, and get quick views for similarity by short and long term performance, fees, portfolio and more.