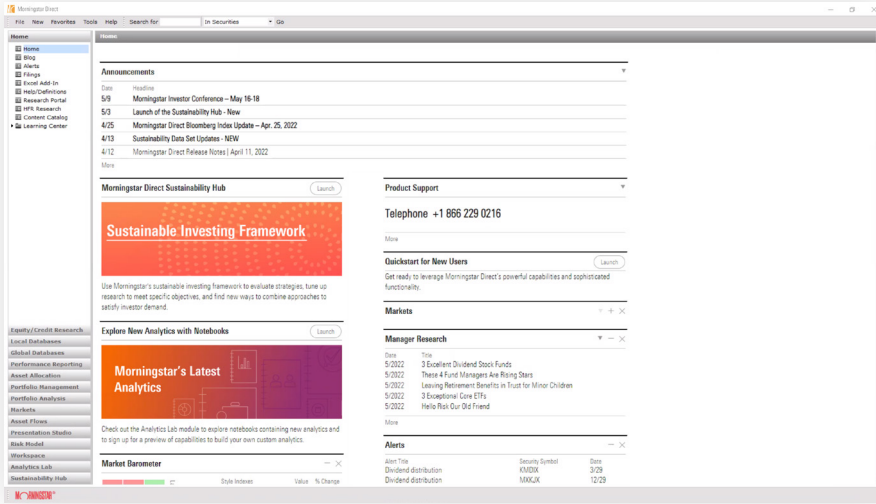




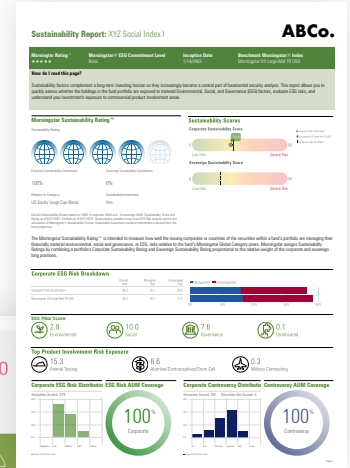
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Trusted data. World-class research. Insightful analysis.



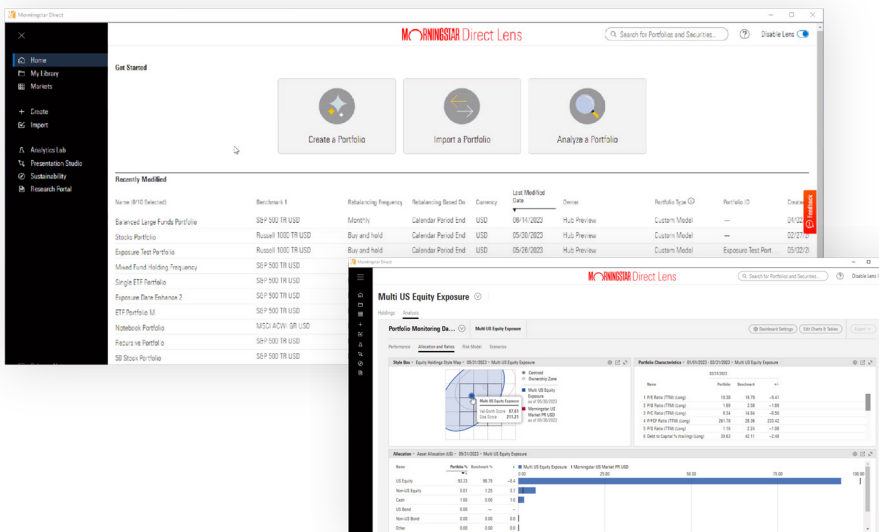
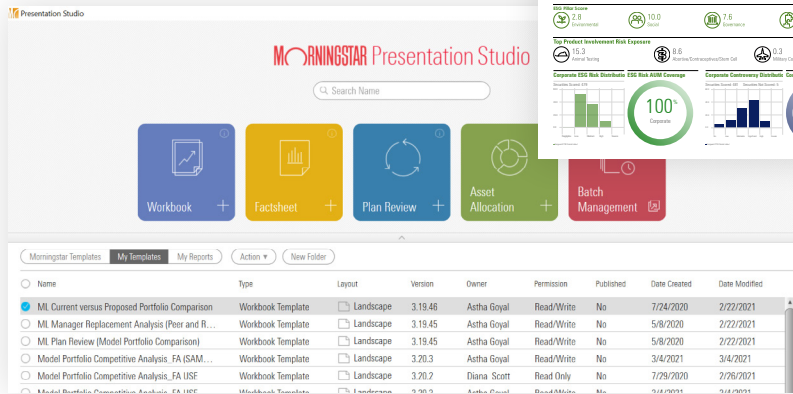
Built for the Way You Work

Our flagship investment analysis platform unites Morningstar's data and institutional research with private and third-party content, rigorous analytics, data science capabilities, and productivity tools.



Designed for Communication

Our reporting solutions help you communicate complex analysis with customized reports, presentations, and visualizations designed to be clear, concise, and compelling. They also provide distribution support that enables an array of communication possibilities.



Portfolio Centric Capabilities

Through our Direct Lens experience, you can easily import, edit and analyze portfolios all in one place. Providing an intuitive experience saving you time and giving you the full picture to see your investments more clearly than ever.

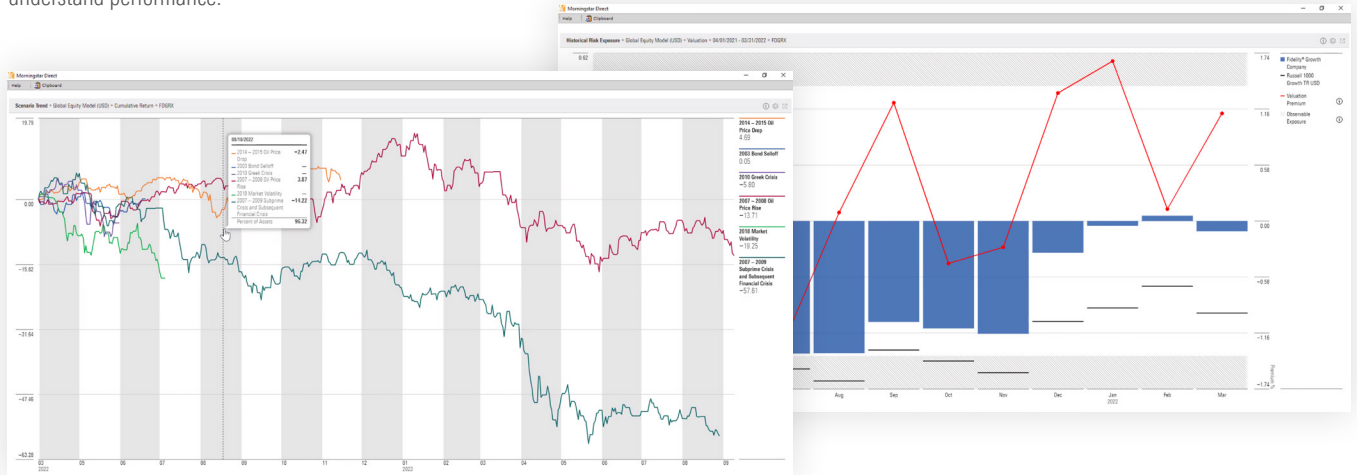


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Empowering Analytics

Our estimated asset-flow and market-share data lets you conduct current, relevant competitive analysis. If you want to look inward, you can optimize asset allocation, apply benchmarks, and leverage holdings-based analytics to better understand performance.

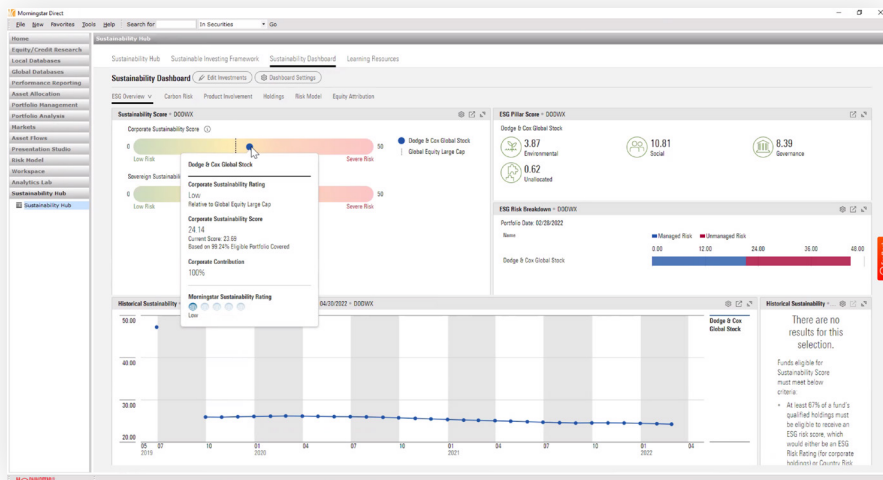
And our Global Risk Model dives even deeper by harnessing our holdings database to identify an investment's true sources of risk and potential returns using proprietary Morningstar factors.



Illuminating Data

We provide the context you need to make confident investment decisions. Empower positive outcomes built on our global, multi-asset investment database, which includes historical portfolio holdings, equities, Model Portfolios, CIT's, Separate Accounts, ETFs, indexes, strategy-level data, ESG data, fixed-income data, and more.

The table lists various investment holdings, including equities, fixed income, and alternative assets. Key columns include: Ticker, Name, Sector, Morningstar Rating, Performance (1Y, 3Y, 5Y, 10Y), and Manager. The table is filtered to show 'All Equities' and includes a search bar and various filters.



Compelling Sustainability Stories

Morningstar Direct provides standardized, high-quality data, research, and ratings you can use to understand and act on sustainable investing's opportunities and challenges. We speak a common language about environmental, social, and governance risk across all asset classes and all audiences, so you've got apples-to-apples comparison that plug into your workflows, and give you an analytical advantage for evaluating investments.

