

Morningstar Direct Forum

29th August 2018

The St. Regis Hotel, Lower Parel - Mumbai

Agenda	
9:30 – 10:00am	Registration and Refreshments
10:00 – 10:30am	Enhancing your workflow – sneak peek into Morningstar’s mission & flagship offering
10:30 – 11:30am	From the Research lens - Picking mutual funds purely based on performance can be tricky. Learn how to use Morningstar Direct to research, analyze and compare Mutual Funds to make informed choices for investor portfolios.
11:30 – 11:45am	Tea/Coffee Break
11:45 – 12:45pm	Advisory insights - Empirical studies show that asset allocation policy is one of the most important factors in determining portfolio’s risk and return characteristics over time. constructing an optimal asset allocation portfolio, it is critical to take advantage of diversification benefits over the long run.
12:45 pm onwards	Networking Lunch
* Agenda is subject to change	