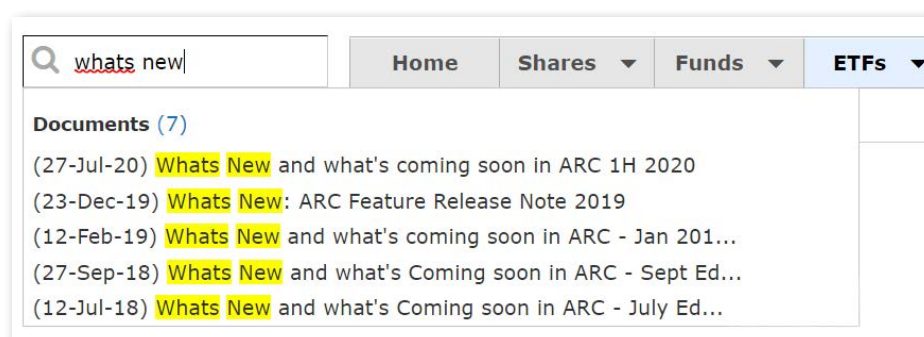


## Adviser Research Centre™ Product Feature Release Note November 2020

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Since the middle of 2020 we have made some fantastic improvements to the Adviser Research Centre. New tools, usability and workflow improvements plus additional data points to help you empower investor success.

If you missed any of these enhancements simply search Whats New in the ARC search box to get a full list of all enhancement and product update documents. Here is the latest one in case you [missed it](#).



At Morningstar we are committed to invest in our products to better serve you, and to help you get the most out of your Adviser Research Centre portal access we have completed some more enhancements in the product. These are outlined on the following pages.

## New ESG Screener

The new Morningstar ESG Screener helps Advisers filter on Managed Funds using existing attributes such as Morningstar Analyst rating, Morningstar Category, Morningstar Sustainability Rating and Carbon Risk Score. This new tool now incorporates more ESG focus areas such as **Sustainable by Prospectus** (1 Does the Funds mandate in the prospectus meet ESG standards), **Sustainability Percentage Rank** (2 A fund’s percent rank within its Global Category, based on its Portfolio Sustainability Score), **Filter By Product Involvement** (3 Does your client want to exclude Tobacco or Alcohol, or is interested in Renewable energy. Filters to help Advisers find the most suitable investments for ESG focused investors), Send to **Compare, XRAY or Export** (4 Send results to the Fund-ETF compare tool or to Portfolio XRAY or export to Excel for further data analysis.)

**Funds / ESG Screener**

### Search or Filter Investments

Q Search by Name or ISIN or Ticker

<b>Morningstar Analyst Rating™</b> <input type="text" value="Select one or more items"/>	<b>Flagship Fund</b> <input type="text" value="All"/>	<b>Flagship Fund Analyst Rating™</b> <input type="text" value="Select one or more items"/>	<b>Morningstar Category</b> <input type="text" value="Select one or more items"/>
<b>Morningstar Sustainability Rating™</b> <input type="text" value="Select one or more items"/>	<b>Low Carbon Designation</b> <input type="text" value="All"/>	<b>Sustainable Investment (By Prospectus)</b> 1 <input type="text" value="All"/>	<b>Carbon Risk Score- 12 Month Avg</b> <input type="text" value="All"/>
<b>Fossil Fuel Involvement-12 Month Avg</b> <input type="text" value="All"/>	<b>Fund Provider</b> <input type="text" value="All"/>	<b>Sustainability Percent Rank</b> 2 <input type="text" value="All"/>	<b>Domicile</b> <input type="text" value="All"/>

**Filter By Product Involvement** 3

<input type="checkbox"/> Exclude Alcohol	<input type="checkbox"/> Exclude Controversial Weapons	<input type="checkbox"/> Exclude Small Arms	<input type="checkbox"/> Exclude Tobacco
<input type="checkbox"/> Exclude Thermal Coal	<input type="checkbox"/> Include Renewable Energy		

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### Review and Analyze Your Search Results

Overview
Sustainability
Short Term Performance
Long Term Performance
Fees
Portfolio
Risk

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4

<input type="checkbox"/> Name	APIR Code	Morningstar Analyst Rating™	Flagship Fund Analyst Rating™	Analyst Rating Date	Morningstar Sustainability Rating™	Morningstar Category
<input type="checkbox"/> Pental Ethical Share Fund	RFA0025AU	Under Review	–	29 Sep 2020	@@@	Equity Australia Large Blend
<input type="checkbox"/> T.Rowe Price Global Equity Growth Fund	–	🏆 Gold	–	17 Mar 2020	@@@	Equity Region World
<input type="checkbox"/> Capital Group New Perspective Fund (AU)	CJM0006AU	🏆 Gold	–	26 Oct 2020	@@@	Equity World Large Blend
<input type="checkbox"/> Harbour Australasian Equity	–	🏆 Gold	–	2 Jul 2020	@@@	Equity Region Australasia
<input type="checkbox"/> Resolution Capital Global Property Securities (WS)	WHT0024AU	🏆 Gold	–	18 Aug 2020	@@@	Equity Global Real Estate

## Fund Compare

(Now called Fund-ETF Compare) has been enhanced to allow ETFs also. This means users can compare side by side similar investments across the Funds and ETF universe.

### Funds / Fund-ETF Compare

+  
Add holding

Magellan Global ✕  
 15699

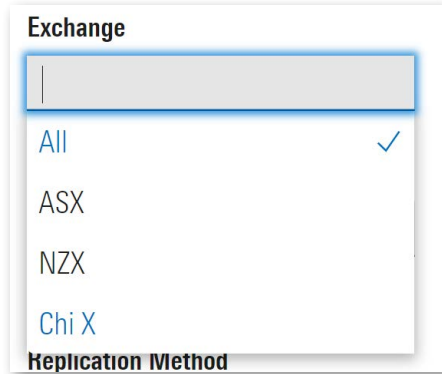
Magellan Global  
Equities Fund ✕  
 MGE

#### Key Information

<b>APIR</b>	MGE0001AU	–
<b>Analyst Rating</b>	Gold	Silver
<b>Flagship Fund Analyst Rating</b>	–	–
<b>Sustainability Rating</b>		
<b>Sustainability Rating Date</b>	31 Aug 2020	31 Aug 2020
<b>Carbon Risk Score</b>	4.89 (30 Jun 2020)	4.88 (30 Jun 2020)
<b>Inception Date</b>	29 Jun 2007	2 Mar 2015
<b>Category</b>	Equity World Large Blend	Equity World Large Blend
<b>Total Assets</b>	11,940.01m	1,746.74m
<b>Fees</b>	1.49% (30 Jun 2019)	1.48% (30 Jun 2019)
<b>Domicile</b>	Australia	Australia
<b>Benchmark</b>	MSCI World NR AUD	MSCI World NR AUD

## ETF Screener – 2 new enhancements

The Addition of Chi-X as an exchange to select when filtering ETFs.



ETF filter result workflow enhancement, allowing for results from a screen to be sent directly to other Adviser Research Centre tools. For example, screen for Gold/Silver rated, socially responsible (5&4 Globes) ETFs. Select these 5 results and send them directly to an **1 XRAY** to analyse these results in a portfolio, or send them to the **2 Compare tool** to do side by side comparisons.

**ETFs / ETF Screener**

### Search or Filter Investments

🔍 Search by Name or ISIN or Ticker

<b>Exchange</b> All	<b>ETF Provider</b> All	<b>Morningstar Analyst Rating™</b> x Gold   x Silver	<b>Management Fee(%)</b> All
<b>Index fund</b> All	<b>Net Assets(mil)</b> All	<b>Largest Geographical Regions</b> Select one or more items	<b>Morningstar Sustainability Rating™</b> x 5   x 4
<b>Replication Method</b> Select one or more items	<b>Sector</b> Select one or more items	<b>Morningstar Category</b> Select one or more items	<b>Low Carbon Designation</b> All
<b>Carbon Risk Score</b> All	<b>Fossil Fuel Involvement %</b> All	<a href="#">Reset Filters</a>	

### Review and Analyze Your Search Results

Overview
Sustainability
Short Term Performance
Long Term Performance
Portfolio
Risk

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Name	Ticker	Morningstar Analyst Rating™	Management Fee(%)	Morningstar Category	Last Close Price	Net Assets(mil)	Morningstar Sustainability Rating™	Morningstar Rating™
✓ iShares Edge MSCI World Multifactor ETF	WDMF	👉 Silver (29-Sep-2020)	0.35	Equity World Large Blend	34.25 AUD	200.10	🌍🌍🌍🌍	★★
✓ SPDR® S&P/ASX 200 Listed Property Fund	SLF	👉 Silver (08-May-2019)	0.40	Equity Australia Real Estate	11.23 AUD	510.18	🌍🌍🌍🌍🌍	★★★★
✓ VanEck Vectors Australian Equal Weight ETF	MVW	👉 Silver (22-Sep-2020)	0.35	Equity Australia Large Blend	29.02 AUD	1,277.72	🌍🌍🌍🌍	★★★★★
✓ VanEck Vectors MSCI World ex Australia Quality ETF	QUAL	👉 Silver (08-Sep-2020)	0.40	Equity World Large Blend	33.81 AUD	1,337.39	🌍🌍🌍🌍	★★★★★
✓ Vanguard Australian Property Securities Index ETF	VAP	👉 Gold (04-Jun-2019)	0.23	Equity Australia Real Estate	76.10 AUD	1,573.47	🌍🌍🌍🌍	★★★★

Displaying 1 - 5 of 5 Results Show Rows 25

## New Listed Investment Screener

A LIC screener has been added to Adviser Research Centre making it easier for users to look for and analyse LICs. Filter based on Morningstar Analyst rating, Morningstar Category and other specific datapoints. Results can be Exported to Excel for further analysis or sent to the **1 XRAY** tool to view as part of a portfolio. This tool can be found under the LIC tab.

**LICs / LIC Screener**

Search or Filter Investments

Search by Name or ISIN or Ticker

Morningstar Analyst Rating™: Select one or more items

Management Fee(%): All

Net Assets(mil): All

Performance Fee Applicable: All

Morningstar Category: Select one or more items

Reset Filters

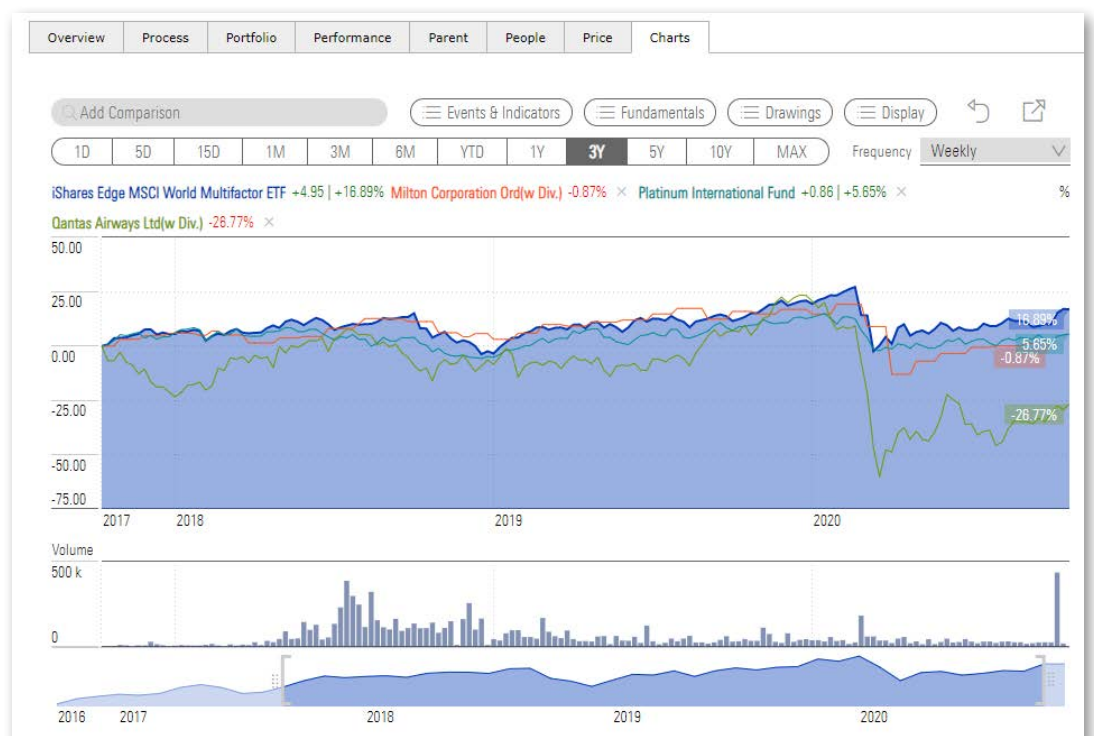
Review and Analyze Your Search Results

Overview Performance Fees

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Name	Symbol	Morningstar Analyst Rating™	Morningstar Category	Net Assets(mil)	Last Close Price
360 Capital Enhanced Income Fund	AYF	-	Diversified Credit	19	6.09 AUD
8I Holdings Ltd	8IH	-	Equity World Mid/Small	35	0.14 AUD

A further enhancement has been made to the recently updated Chart application in Adviser Research Centre. This Chart tab can be found on any investment landing page. Depending on your level of access, users will be able to cross universe charting. For example, a Managed Fund, ETF, LIC and Equity all on the one chart allowing for easier comparison and analysis of investment historical performance.





**Mark McPhee**  
Customer Success Manager

As with all of our new features, we would love to hear your feedback so that we can continue to refine and improve Morningstar Adviser Research Centre.

Feedback can be provided directly to the team via the 'feedback' link at the top right corner of the home page. Or feel free to email me directly.

You can also get in contact with **Mark McPhee**, Customer success manager for Adviser software. He can assist on any of your support or training needs.

Feel free to join him on one of his upcoming sessions. Keep an eye out for more exciting sessions or if you have something specific in mind please let him know. To join please [click here](#)

If you have any questions or would like any further information on any these product enhancements, please contact me or our Client Services Help Desk (1800 348 628) or [helpdesk.au@morningstar.com](mailto:helpdesk.au@morningstar.com).

Regards,

Tony Gangemi

Head of Adviser Software Solutions, Morningstar Australasia Pty Ltd.

[Tony.Gangemi@morningstar.com](mailto:Tony.Gangemi@morningstar.com)