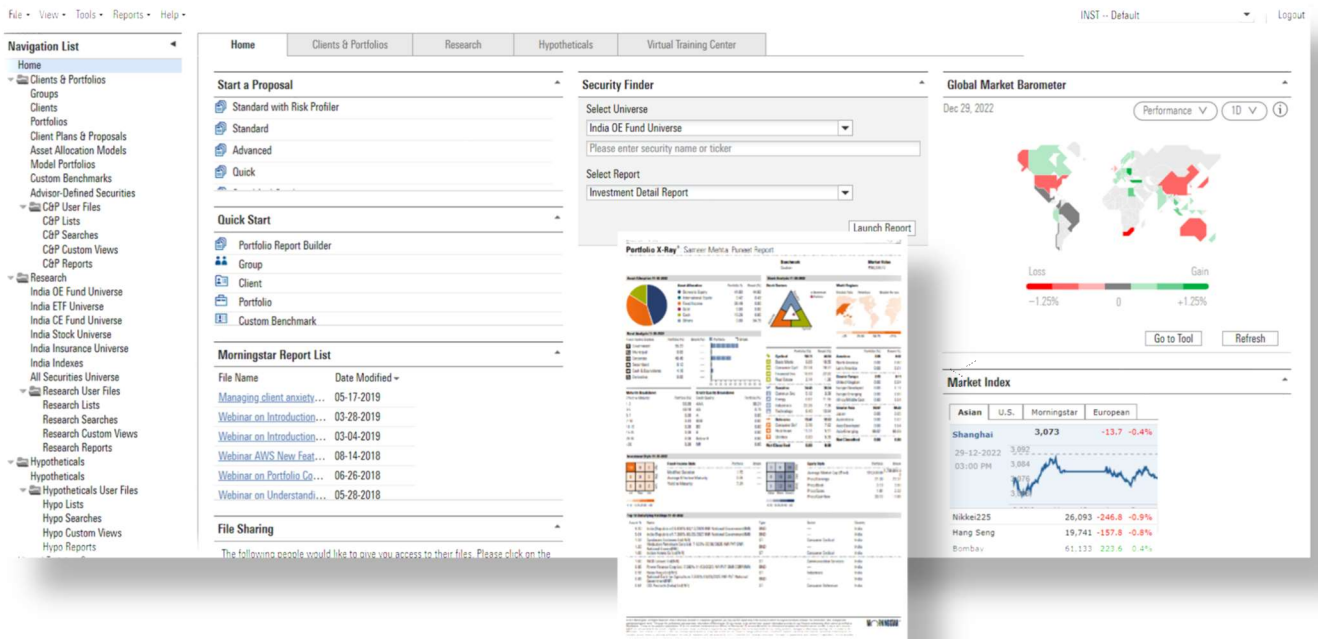


Morningstar® Advisor WorkstationSM



Morningstar® Advisor WorkstationSM integrates client positions, saving the time and errors that can result from manually entering data. It helps advisors analyze client portfolios and create compelling reports in a few simple steps.

Investment Research

To support the research process, Morningstar® Advisor WorkstationSM combines high-quality data with in-depth reports from our independent analysts to help advisors determine suitable investments for clients and prospects. Advisors can screen and rank open-end mutual funds, stocks, exchange-traded funds, closed-end funds, and Insurance funds. After completing the screening, advisors can look further into an investment by using analyst reports with exclusive Morningstar research on thousands of stocks and mutual funds. After they have refined their security recommendations, advisors can share these with clients through Morningstar® Investment Detail™ reports.

Portfolio Construction and Diagnostics

Advisor Workstation helps advisors quickly build, analyze, and monitor client portfolios.

Three key reports — Morningstar® Portfolio Snapshot,TM Morningstar® Stock Intersection,SM and Morningstar® Portfolio X-Ray Report — help uncover shortcomings in a portfolio.

Planning Tools

With Advisor Workstation, advisors can determine a client's risk tolerance and investment goals to build diversified, appropriate portfolios. A risk-tolerance questionnaire identifies risk profiles for assigning suitable model portfolios. Then, the advisor can select asset allocations from an efficient frontier curve and run Monte Carlo projections illustrating possible outcomes to demonstrate how different strategies might succeed.

Hypothetical Illustrations

Through hypothetical sales illustrations, advisors can demonstrate how recommendations would have affected a client's wealth. Illustrations can include details such as investments, withdrawals, reinvestment of dividends, taxes, investment fees (reflecting real breakpoints), and other charges to portray real-world scenarios. The underlying holdings in the Morningstar database make it possible to show performance within the context of asset allocation, sector weightings, and style diversification information.

Morningstar's India Centric Reports for AdvisorsSM

Based on market research intelligence and on Advisor's feedback we have developed several reports which provides insights to Mutual fund portfolios, fund manager's performance, MF's exposure to various debt securities and many more such unique reports.

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