



## Report Portal—Key Benefits

### What do I get with a Report Portal License?

<b>Meets Compliance Controls</b>	Configure Report Portal to meet your Compliance team’s requirements, including but not limited to: reverse inquiry automated emails, specific share-classes or investments to run by the selling team, or the ability to customize disclosures and leverage Morningstar industry-standard methodologies.
<b>Performance &amp; Risk Data</b>	In rapidly changing markets, you can run reports with data as recently as the last market close.
<b>Holdings Data</b>	Detailed Holdings Data and Attribution Analysis. You can run reports that include equity and fixed income holdings statistics to educate advisors on how your products are constructed versus competitors.
<b>Peer Group Reporting</b>	Advanced and Customizable. You can run reports showing how your products (and competitors) rank relative to respective Morningstar peer groups.
<b>Point of Sale Reporting</b>	You can use Report Portal to run reports at the point of sale to help save time and win business.
<b>Customizable Reports</b>	You can differentiate yourselves by creating quality branded reports.
<b>ESG Data</b>	You can leverage Morningstar’s ESG data to educate advisors on how their products (and competitors) rank from a sustainability standpoint.
<b>Data Availability</b>	You can include all relevant data points to best educate advisors and tell their unique story across different product types (OE Funds, ETFs, SMAs, Models, and Advisor Models, etc).
<b>Fixed Income Data</b>	You can incorporate credit quality, duration, maturity, Yield to Worst, etc.
<b>Risk Factor Analysis</b>	You can incorporate quantitative risk factors (momentum, quality, etc.) to provide more sophisticated analytics that are still easy to digest, visually.
<b>Forward-Looking Scenario Analysis</b>	You can show how under various market and macro conditions, your products will fare from a forward-looking performance and risk standpoint.
<b>Integration with CRM</b>	You can integrate Morningstar Report Portal directly into Salesforce for better tracking and centralization of activities.
<b>Flow Data</b>	You can use flow data to tell the story of how your products are gaining assets and how competitors are losing assets.
<b>Customer Service</b>	You can be confident that your investment in Report Portal is met with Morningstar’s highest commitment to offer institutional quality support, from initial rollout through ongoing support, ensuring you’re aware and taking advantage of all new data sets, analytics, and launching competitive templates that will resonate in the market. Dedicated Customer Success Managers to assist with the ongoing training and implementation.