

# Morningstar® Adviser Research Centre™

## Key Benefits

- ▶ A web-based solution designed specifically to meet the research, portfolio analysis, and client communication needs of a financial adviser

## Conduct Research and Find Best Investments

Gain access to Morningstar's leading independent research, including:

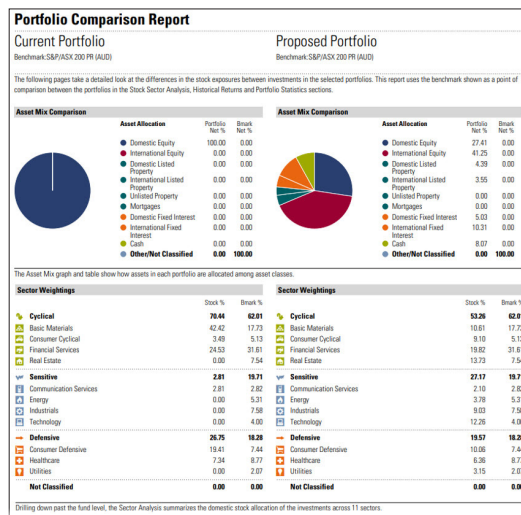
- ▶ Australia, New Zealand, and Global Equities Best Ideas
- ▶ Proprietary Equity, Fund, and ETF Model Portfolios
- ▶ Special reports such as Economic Updates, Market Outlook, and insights on key industry events
- ▶ Detailed research reports covering approximately 200 Stocks, 450 Managed Funds and ETFs, as well as a number of LICs and Hybrid securities

## Investment Screeners

Screen based on desired criteria to find the most appropriate investments for clients. There is an array of available data points to filter on, including Morningstar ratings, sectors, asset classes, key financial ratios, and investment style.

## Analyse and Evaluate Portfolios

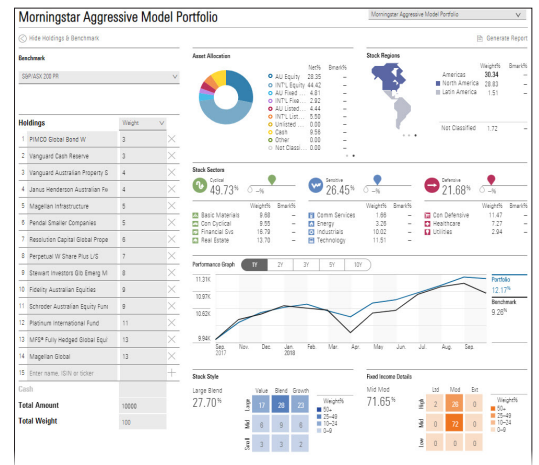
Create client friendly reports to communicate the value of a recommended portfolio relative to a client's current portfolio.



Evaluate a portfolio's asset allocation and exposure to regions and sectors to ensure the portfolio is constructed to meet the desired goals.

See how exposed a portfolio is to individual stocks, either through direct ownership or through managed funds and ETFs to understand its true level of diversification.

View its performance in isolation or against a benchmark.

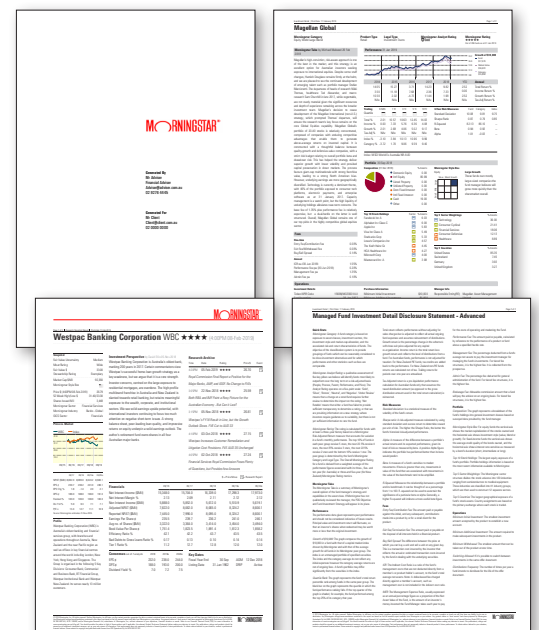


## Streamline the SOA Process

Reduce the time associated with producing SOAs with the compendium feature that efficiently combines the research reports for a client's holdings in one easy-to-read PDF.

## Integration

Leverage built-in integration and include Morningstar research reports in SOAs produced in financial planning software such as XPLAN, COIN, and Adviser Logic.



For more information  
Visit <https://arc.morningstarhub.com.au> for a free two-week trial or contact us on 02 9276 4445 / [sales.au@morningstar.com](mailto:sales.au@morningstar.com)