8:00a–8:50a
Registration and Continental Breakfast

8:50a–9:00a
Welcome Address

9:00a–9:45a
What’s New in Morningstar Direct™
Sharon Murphy, Head of Morningstar Direct and Reporting Solutions

9:55a–10:40a
Breakout Session 1 (choose one of the topics below)

Intro: Presentation Studio
Presentation Studio allows users to create compelling custom presentations within Morningstar Direct. Discover how to create professional, custom-branded fact sheets and presentations, to effectively communicate company and product information with clients. Start with a Morningstar template or design your own.
Cara Frigo, Associate Product Manager

Use Case: Manager Research Services and Due Diligence
Morningstar Direct provides ways to simplify your manager selection and due diligence processes for investments across multiple asset classes and custom groups. Learn how to take advantage of holdings- and returns-based style analysis along with attribution analysis. Determine drivers of performance while analyzing the impact of active share and exposures to specific industries. Tools covered: portfolio analysis, fundamental research, notes manager, presentation studio.
Dan Lefkovitz, Director of Manager Research Services
Phil Nagel, Business Analyst, Buy Side Software

10:50a–11:35a
Breakout Session 2 (choose one of the topics below)

Intro: Asset Allocation Modeling
Learn how to model asset class behavior, apply resampling, identify optimal asset allocation policies, and forecast future performance with our asset allocation tool. Select from a variety of distribution models and return methodologies to build portfolios designed to deliver the highest return for an acceptable level of risk or the lowest risk for a desired level of return. In this session, get a glimpse of the newly integrated portfolio construction workflow.
Patrick Stack, Senior Product Manager, Multi Asset Software

Use Case: Construct Peer Groups and Monitor Funds Successfully
Learn how consultants and gatekeepers evaluate funds. Discover how they screen for funds with similar strategies to construct a meaningful peer group and calculate custom modern portfolio theory statistics for comparative analysis. Apply point-weighted methodologies to grade how well the investment strategies meet their objectives. In this session, we will also look thoroughly at the Morningstar Institutional Category classifications. Tools covered: performance reporting, investment scorecard.
Joshua Walker CFA, Board Consulting Services

11:45a–1:00p
Lunch Presentation: Morningstar Research Making Sense of Liquid Alternatives
Liquid alternatives have exploded onto the investing landscape at a rate that has often left due diligence practices in the dust. In this session Morningstar’s Josh Charlton will go over trends in liquid alternatives from a variety of angles including flows, product launches and investor sentiment. He will also reveal how Morningstar tackles evaluating alternatives—from categorization to benchmarking to dealing with short strategy histories.
Josh Charney, CFA, Analyst, Alternative Strategies, Alternative Funds Research

1:10p–1:55p
Breakout Session 3 (choose one of the topics below)

Intro: Portfolio Analysis and Equity Attribution
Using our web-based tool, Portfolio Analysis, clients can research and monitor markets, individual companies, and portfolios in real time. Learn how to cover the investment workflow process: from identifying the impact of manager investment decisions to taking advantage of Morningstar research.
Phil Nagel, Business Analyst, Buy Side Software

Use Case: Apply Reporting Solutions to Communicate Results
Learn how to deliver important information with Presentation Studio. Discover how to effectively communicate results with custom branded reports to identify the impact of strategic asset allocation and management implementation decisions. Tools covered: Presentation Studio and Total Portfolio Attribution.
Cara Frigo, Associate Product Manager

3:00p–3:45p
Closing Presentation: Morningstar Research Parsing the Nontraditional Bond Category
Learn Morningstar’s perspective on the genesis, evolution, and current state of Nontraditional Bond funds, including risks that may not be immediately apparent and key questions for investors and advisors to ask when considering an investment in the category.
Sarah Bush, Associate Director, Manager Research, Fixed-Income Strategies

4:30p–5:45p
Cocktails and Hors d’oeuvres
Join the Morningstar Direct team to continue the conversation and network with your peers.