Using Peer Analytics

Morningstar Office Cloud



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Using Peer Analytics in Morningstar Office Cloud

Peer Analytics in Morningstar OfficeSM Cloud allow you to conduct more effective investment analysis within a grid. With this, you are able to apply the following formatting options to your grid:

Overview

- ► Groupings allow you to organize your grid by different groups.
- Conditional formatting allows you to clearly identify trends within your list or screen using data points, and
- Benchmarks allows you to more easily compare your investments against benchmarks of your choosing.

Once created, peer analytics are saved with the data set displayed on your screen and can be used across multiple lists and screens.

In this manual, you will complete a series of exercises that apply peer analytics to a Grid. Before completing these exercises, you should complete the exercises found in the Creating Screens and Working with Custom Data Sets manual.

In this manual, the following topics are covered:

- ► What do I need to know before applying peer analytics? (page 5)
- ► What do I need to do before applying peer analytics? (page 5)
- Exercise 1: Open the screen in a Grid (page 5)
- Exercise 2: Add groupings to your grid (page 7)
- Exercise 3: Add conditional formatting to your grid (page 8)
- Exercise 4: Add a display benchmark to your grid (page 10)
- Exercise 5: Save peer analytics with a data set (page 11)

Before using the Peer Analytics capabilities in a Grid, note the following important points:

- The list or screen you are viewing can have no more than 2,000 items, as this is the limit when using the Peer Analytics capabilities, and
- The Peer Analytics panel is available in the Grid, but the grid must be expanded for the Show Peer Analytics button to be seen.

Before applying peer analytics, complete the following steps:

- 1. Select investments to analyze via list or screen.
- 2. Open the investments in a grid, and
- 3. Choose the columns you want to display within your grid.

In the following exercises, you will apply peer analytics to the Gold-Rated Large Cap Funds screen you completed in the Creating Screens manual.

Before you can apply peer analytics to your screen, you must first open a set of investments in a grid. This can be a saved list or screen. In this exercise, you will open the Gold-Rated Large Cap Funds screen. Then you will open the Peer Analytics panel. Do the following:

What do I need to know before applying

peer analytics?

What do I need to do before applying peer analytics?

Exercise 1: Open the screen in a Grid



1. From the Menu, select Workspace > Lists & Screens. The Lists & Screens page opens.

2. Select Gold-Rated Large Cap Funds screen. The screen opens in a grid.

Menu	Lists & Screens				Q Search	
(0	25 🕑 Create List 🖄 Create Screen	🗇 🗇 Delete				
Select a	previously created List or Screen from the be	low table. To create or dele _{Type}	te a List or Screen, us Owner	e the controls above. Last Modified Date	Created Date	
	1 Gold-Rated Large Cap Funds	Screen	Me	05/24/2019	05/24/2019	Select this screen
	2 Scenario Analysis Shared 3 Preferred Investment Shared	Screen List	Me Me	03/27/2019 12/04/2018	03/12/2019 02/08/2018	
	4 Conservative Shared	List	Me	10/26/2018	10/26/2018	
	5 Moderate Shared	List	Me	10/26/2018	10/26/2018	

- 3. On the **right side** of the window, click **Show Peer Analytics**. The Peer Analytics panel opens.
 - ☞ Note: In this exercise, use the Manager Research Standard Data Set.

			USE	e this dat	a set.				
Gold-Rated Large Cap Funds \vee					Q :	Search for Clients, Secu	() N 🤐	Bo	
676 🖂 🖩 🛇 + 🕰 🖸		Data Set: Ma	inager Res	earch Rea	d Only 🗸		Show Peer Analytic	s 🔇	Click this button.
Name	Morningstar Rating Overall (mo-end)	Total Return (1Y - mo- end)	Total Return (3Y - mo- end)	Total Return (5Y - mo- end)	Alpha Total (excess return) (1Y - qtr-end) Cat Curr	Alpha Total (excess return) (3Y - qtr-end) Cat Curr	Beta Total (excess r return) (1Y - mo-end) Cat Curr	Be returi	
1 American Funds AMCAP 529A	***	16.25	13.25	10.84	-5.01	-0.35	1.03		
2 American Funds AMCAP 529C	**	15.44	12.41	10.00	-5.71	-1.11	1.03		
3 American Funds AMCAP 529E	**	16.01	13.00	10.60	-5.26	-0.58	1.03		
4 American Funds AMCAP 529F1	***	16.50	13.50	11.08	-4.81	-0.12	1.03		
5 American Funds AMCAP A	***	16.30	13.33	10.93	-5.00	-0.28	1.03		
6 American Funds AMCAP C	**	15.45	12.44	10.06	-5.68	-1.05	1.03		
7 American Funds AMCAP F1	***	16.27	13.26	10.86	-5.03	-0.34	1.03		
8 American Funds AMCAP F2	***	16.60	13.56	11.16	-4.76	-0.09	1.03		
9 American Funds AMCAP F3	**	16.69	13.68	-	-4.66	0.03	1.03		j

Use groupings to sort and organize investments in a list or screen. Investments can be grouped according the following:

Exercise 2: Add groupings to your grid

- ► Global Broad Category Group
- ► Global Category
- ► Investment Type, and
- ► Morningstar Category.

You can also separate Open-End Funds and ETFs. In this exercise, you will group investments by Morningstar Category and Investment Type. Do the following:

- 1. In the Peer Analytics panel, click the caret next to Grouping.
- 2. From the **drop-down** menu, select **Morningstar Category**. Then click the **Add Grouping Level** button. A new drop-down menu appears.

\equiv Gold-Rated Large Cap Funds \lor			🤉 Search for Clients, Securities, Reports, a 🛛 🥵 🕼	102	
	🗈 🍸 🛛 Data Set: 🛙	Aanage	Research Read Only V Hide Pee	r Analytics 📀	
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3 American Funds AMCAP 529E	** 16.01	1		_	Select this option.
4 American Funds AMCAP 529F1	*** 16.50	1	I Morningstar Category V O Separate OE and ETF Funds		
5 American Funds AMCAP A	*** 16.30	1			
6 American Funds AMCAP C	** 15.4		(Add Provision Land)		
7 American Funds AMCAP F1	*** 18.21		Add Brodhing Terrel		
8 American Funds AMCAP F2	*** 16.60		Conditional Formatting	0	
9 American Funds AMCAP F3	** 16.66			_	Click here to add a
10 American Funds AMCAP R1	** 15.4		Benchmarks	0	CIICK HELE LU AUU A
11 American Funds AMCAP R2	** 15.4				second grouping.
12 American Funds AMCAP R2E	** 15.78				
13 American Funds AMCAP R3	** 15.95				
(1) 14 American Dunde A14010 04	-				

3. From the drop-down menu, select Investment Type.

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	7 American Funds AMCAP F1	***	16.27 1	Investment type	\sim	
	8 American Funds AMCAP F2	***	16.60 1			
	9 American Funds AMCAP F3	**	16.69 1	Add Grouping Level		
	10 American Funds AMCAP R1	**	15.44 1	Conditional Formatting	0	
	11 American Funds AMCAP R2	**	15.44 1	- Conditional Formatting	e	
	12 American Funds AMCAP R2E	**	15.78 1	Benchmarks	0	
	13 American Funds AMCAP R3	**	15.95 1			
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	22 American Funds American Mutual A	****	14.85 1			
	23 American Funds American Mutual C	****	13.99 1		Apply	

4. Click Apply.

Use conditional formatting to clearly identify trends within your investments using color coding. In this exercise, you will use conditional formatting to compare total return category rank percentages of the investments within your screen. Do the following:

Exercise 3: Add conditional formatting to your grid

- 1. In the **Peer Analytics** panel, click the **caret** next to **Conditional Formatting**.
- 2. In the All Numeric Data drop-down field, select Total Ret % Rank Cat 3Y mo-end (mo-end).
- 3. From the next drop-down menu, select Between.
- 4. In the text fields, type **0** and **25**.
- 5. From the Formatting Style drop-down menu, select pink.

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	▼ Open-End Fund					
	1 Vanguard LifeStrategy Income Inv	VASIX	FOUSADOBCR	Allocation		
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	2 Vanguard LifeStrategy Cnsrv Gr Inv	VSCGX	FOUSA00E6C	Allocation	I Investment Type V	< Comparison of the second sec
	3 Vanguard Tax-Managed Balanced Adm	VTMEX	FOUSA00885	Allocation	" Intestment type	
	4 Vanguard Wellesley [®] Income Admiral [™]	VWIAX	FOUSA02T3B	Allocation		
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	11 Vanguard LifeStrategy Moderate Gr Inv	VSMGX	FOUSA00FK9	Allocation		27
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	13 Vanguard Wellington™ Inv	VWELX	FOUSADOFVM	Allocation		
	14 VY® T. Rowe Price Capital Apprec I	ITRIX	FOUSA04BP8	Allocation		
	15 VY® T. Rowe Price Capital Apprec R6	VPRAX	F00000WV3Q	Allocation		
	16 VY® T. Rowe Price Capital Apprec S	ITCSX	FOUSA04BPA	Allocation		
	▼ US Fund Allocation70% to 85% Equity					
	Open-End Fund					
	17 Vanguard LifeStrategy Growth Inv	VASGX	FOUSA00D9E	Allocation		
	▼ US Fund Communications				Арруу	

6. From the **Rule Options Action** menu, select **Duplicate**. Using Duplicate instead of clicking the Add Formatting Rule button saves time by auto-populating fields within the rule.

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		▼ Open-End Fund						
	17	Vanguard LifeStrategy Growth Inv	VASGX	FOUSA00D9E	Allocation			
	۲	US Fund Communications			_		Apply	

- 7. In the text fields, type 26 and 50.
- 8. From the Formatting Style drop-down menu, select blue.
- 9. From the Rule Options Action menu, select Duplicate to add a row.
- 10. In the text fields, type **51** and **100**.
- 11. From the Formatting Style drop-down menu, select yellow.
- 12. Click Apply.

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▼ Open-End Fund													
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3 Vanguard Tax-Managed Balanced Adm	VTMFX	FOUSA00BB5	Allocation	- Investin	onciypo			-					
4 Vanguard Wellesley [●] Income Admiral [™]	VWIAX	FOUSA02T3B	Allocation										
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16 VY® T. Rowe Price Capital Apprec S	ITCSX	FOUSA04BPA	Allocation										
▼ US Fund Allocation70% to 85% Equity													
Open-End Fund													
17 Vanguard LifeStrategy Growth Inv	VASGX	FOUSA00D9E	Allocation										

The benchmark option allows you to add up to two benchmarks to easily compare the investments in your list or screen to the benchmark(s) of your choosing. In this exercise, add the Morningstar US Large Cap TR USD to your grid. Do the following:

Exercise 4: Add a display benchmark to your grid

- 1. In the Peer Analytics panel, click the caret next to Benchmarks.
- 2. From the **Search** field, type **Morningstar US Large Cap TR USD.** Options will dynamically appear.
- 3. Select Morningstar US Large Cap TR USD.

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3 Vanguard Tax-Managed Balanced Adm 30% to 50% 1 **	
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5 Vanguard Wellesley® Income Inv 30% to 50% 6 **	
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4. Click Apply.

5. Click Hide Peer Analytics to view your Grid.

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After adding Peer Analytics, your grid should appear as below.

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	2	Vanguard LifeStrategy Cnsrv Gr Inv	VSCGX	FOUSA00E6C	Allocation30% to 50%	12	****	1771	Gold	Morningstar Mod Tgt Risk TR USD	7.47	
	3	Vanguard Tax-Managed Balanced Adm	VTMFX	FOUSA00BB5	Allocation30% to 50%	1	*****		Gold	Morningstar Mod Tgt Risk TR USD	9.30	
	4	Vanguard Wellesley® Income Admiral™	VWIAX	FOUSA02T3B	Allocation30% to 50%	6	*****	6060	Gold	Morningstar Mod Tgt Risk TR USD	8.14	
	5	Vanguard Wellesley® Income Inv	VWINX	FOUSA00FV9	Allocation30% to 50%	6	*****	00	Gold	Morningstar Mod Tgt Risk TR USD	8.07	
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	7	FPA Crescent	FPACX	FOUSA00ESC	Allocation50% to 70%	81	**	••	Gold	Morningstar Mod Tgt Risk TR USD	6.44	
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	9	T. Rowe Price Capital Appreciation Adv	PACLX	FOUSA05BHL	Allocation50% to 70%	3	*****	00	Gold	Morningstar Mod Tgt Risk TR USD	12.85	
	10	T. Rowe Price Capital Appreciation I	TRAIX	F00000WMWVV	Allocation50% to 70%	1	*****	00	Gold	Morningstar Mod Tgt Risk TR USD	13.31	
	11	Vanguard LifeStrategy Moderate Gr Inv	VSMGX	FOUSA00FK9	Allocation50% to 70%	35	****	000	Gold	Morningstar Mod Tgt Risk TR USD	8.73	
	12	Vanguard Wellington [™] Admiral [™]	VWENX	FOUSA02T18	Allocation50% to 70%	9	*****	0000	Gold	Morningstar Mod Tgt Risk TR USD	10.60	
	13	Vanguard Wellington™ Inv	VWELX	FOUSA00FVM	Allocation50% to 70%	10	*****	0000	Gold	Morningstar Mod Tgt Risk TR USD	10.51	
	14	VY® T. Rowe Price Capital Apprec I	ITRIX	FOUSA04BP8	Allocation50% to 70%	2	*****	000	Gold	Morningstar Mod Tgt Risk TR USD	13.25	
	15	VY® T. Rowe Price Capital Apprec R6	VPRAX	F00000VVV3Q	Allocation50% to 70%	2	*****	000	Gold	Morningstar Mod Tgt Risk TR USD	13.26	
	16	VY® T. Rowe Price Capital Apprec S	ITCSX	FOUSA04BPA	Allocation50% to 70%	3	*****	000	Gold	Morningstar Mod Tgt Risk TR USD	12.98	
		Benchmarks										
		Morningstor US Large Can TR USD	MICOT	XILISA0010M	Large Riend		1000 C	120	122	SSP 500 TR LISD	143	

Your grid should appear as shown below.

Once you apply peer analytics, you will be prompted to save them with the data set that is currently visible within your grid.

Exercise 5: Save peer analytics with a data set

To save peer analytics with a data set, do the following:

1. From the **Data Set** menu, select Save. The Enter a name to save changes box opens.

	G	old-Rated Large Cap Funds \vee					
\checkmark	0	676 🗇 🗐 🛇 + 🕰 [7 🗈 🛚	7	Data Set: Untitled — Edited ∨		
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	•	lame	Ticker	S	Manager Research	ei	nd
	•	JS Fund Allocation15% to 30% Equity			My Custom Fund Data Points		
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0		Benchmarks	1001	-	All Data Sets >	,	
		Morningstar US Large Cap TR USD	MLCPT	Х			-
-	V	JS Fund Allocation30% to 50% Equity			Data Set Actions		
		Open-End Fund			9	-	
	2	Vanguard LifeStrategy Cnsrv Gr Inv	VSCGX	F	🖉 Edit	1	1
	3	Vanguard Tax-Managed Balanced Adm	VTMEX	F	🖾 Save		Click hore to save
	4 Vanguard Wellesley® Income Admiral™ VWIA				+ Create New Data Set		
	5	Vanguard Wellesley® Income Inv	VWINX	F			

2. In the Enter a new data set name field, type Managed Investments Enhanced.



3. Click Save.