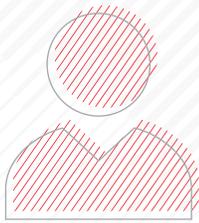
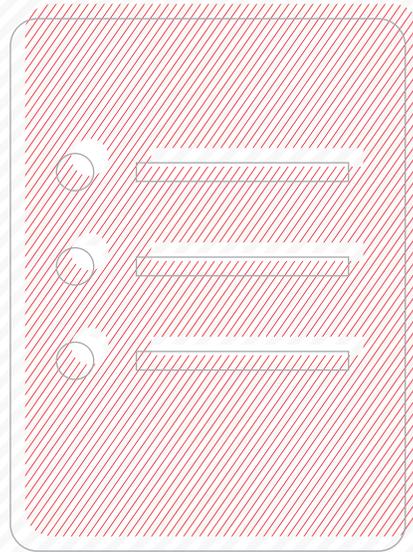
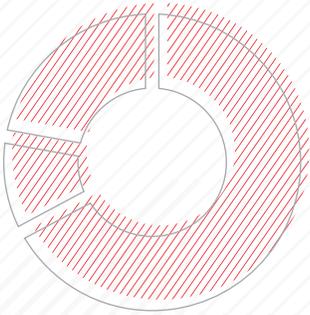
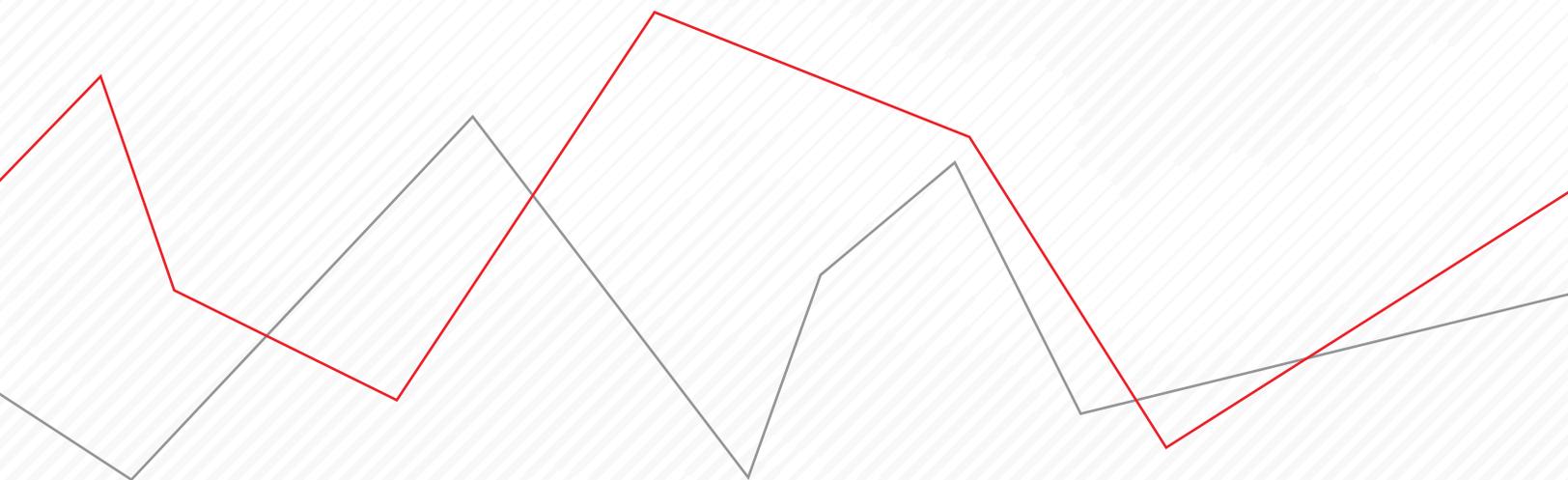


Using Peer Analytics

Morningstar Office Cloud



MORNINGSTAR Office



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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:

- ▶ 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 \(page 11\)](#)

Overview

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.

What do I need to know before applying peer analytics?

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.

What do I need to do before applying peer analytics?

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:

Exercise 1: Open the screen in a Grid

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

Name	Type	Last Modified
Elizabeth Johnson	Screen	07/25/19
MDP Class	Screen	07/08/19
Contrarian Funds	List	07/08/19
Gold-Rated Large Cap Funds	Screen	05/24/19
Scenario Analysis	Screen	03/27/19

[Click here to start.](#)

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

Lists & Screens

Select a previously created List or Screen from the below table. To create or delete a List or Screen, use the controls above.

<input type="checkbox"/>	Name	Type	Owner	Last Modified Date	Created Date
<input type="checkbox"/>	1 Gold-Rated Large Cap Funds	Screen	Me	05/24/2019	05/24/2019
<input type="checkbox"/>	2 Scenario Analysis <small>Shared</small>	Screen	Me	03/27/2019	03/12/2019
<input type="checkbox"/>	3 Preferred Investment <small>Shared</small>	List	Me	12/04/2018	02/08/2018
<input type="checkbox"/>	4 Conservative <small>Shared</small>	List	Me	10/26/2018	10/26/2018
<input type="checkbox"/>	5 Moderate <small>Shared</small>	List	Me	10/26/2018	10/26/2018

Select this screen.

- 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.

Gold-Rated Large Cap Funds

Data Set: **Manager Research** Read Only

Show Peer Analytics

Use this data set.

Click this button.

<input type="checkbox"/>	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 return) (1Y - mo-end) Cat Curr	Bt return
<input type="checkbox"/>	1 American Funds AMCAP 529A	★★★	16.25	13.25	10.84	-5.01	-0.35	1.03	
<input type="checkbox"/>	2 American Funds AMCAP 529C	★★	15.44	12.41	10.00	-5.71	-1.11	1.03	
<input type="checkbox"/>	3 American Funds AMCAP 529E	★★	16.01	13.00	10.60	-5.26	-0.58	1.03	
<input type="checkbox"/>	4 American Funds AMCAP 529F1	★★★	16.50	13.50	11.08	-4.81	-0.12	1.03	
<input type="checkbox"/>	5 American Funds AMCAP A	★★★	16.30	13.33	10.93	-5.00	-0.28	1.03	
<input type="checkbox"/>	6 American Funds AMCAP C	★★	15.45	12.44	10.06	-5.68	-1.05	1.03	
<input type="checkbox"/>	7 American Funds AMCAP F1	★★★	16.27	13.26	10.86	-5.03	-0.34	1.03	
<input type="checkbox"/>	8 American Funds AMCAP F2	★★★	16.60	13.56	11.16	-4.76	-0.09	1.03	
<input type="checkbox"/>	9 American Funds AMCAP F3	★★	16.69	13.68	-	-4.66	0.03	1.03	

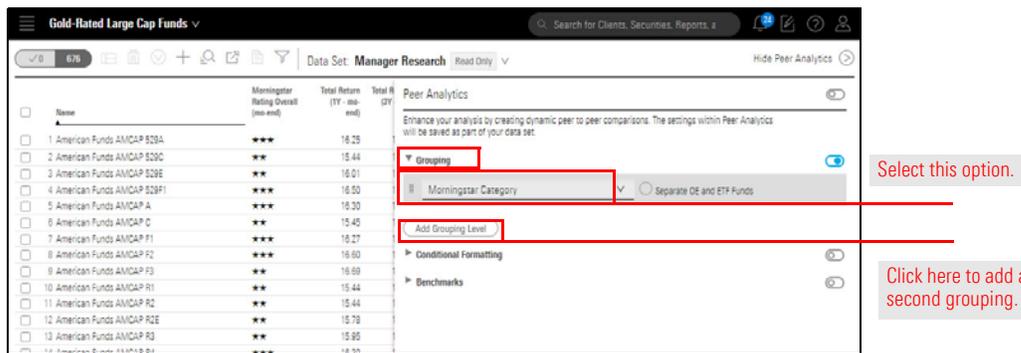
Use groupings to sort and organize investments in a list or screen. Investments can be grouped according to the following:

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

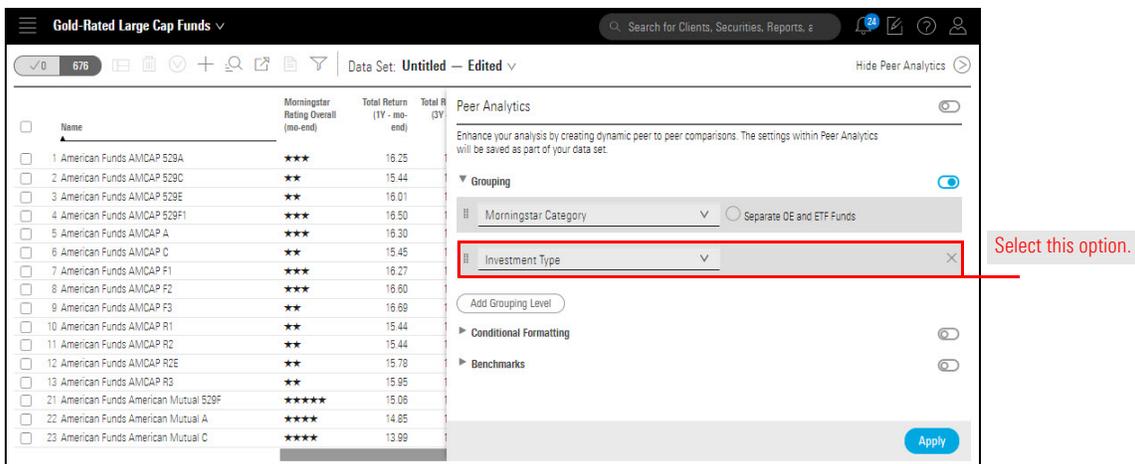
Exercise 2: Add groupings to your grid

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.



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



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

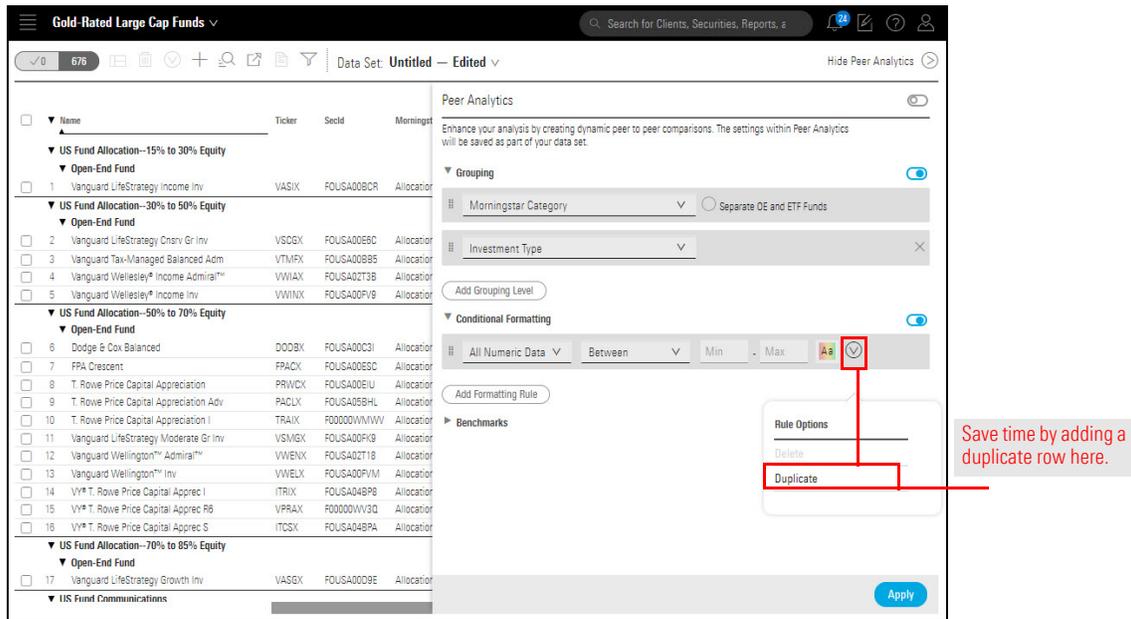
1. In the **Peer Analytics** panel, click the **caret** next to **Conditional Formatting**.
2. In the **All Numeric Data** drop-down field, select **Total Ret % Rank Cat 3Y mo-end (mo-end)**.
3. From the next drop-down menu, select **Between**.
4. In the text fields, type **0** and **25**.
5. From the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

The screenshot shows the Morningstar Office Cloud interface for 'Gold-Rated Large Cap Funds'. The Peer Analytics panel is open, and the 'Conditional Formatting' section is expanded. A red box highlights the configuration for the 'Total Ret % R...' metric, which is set to 'Between' with values '0' and '25'. The 'Formatting Style' dropdown is set to 'Aa', which corresponds to the pink color mentioned in the instructions. A callout box on the right points to this configuration with the text 'Enter conditional formatting data here.'

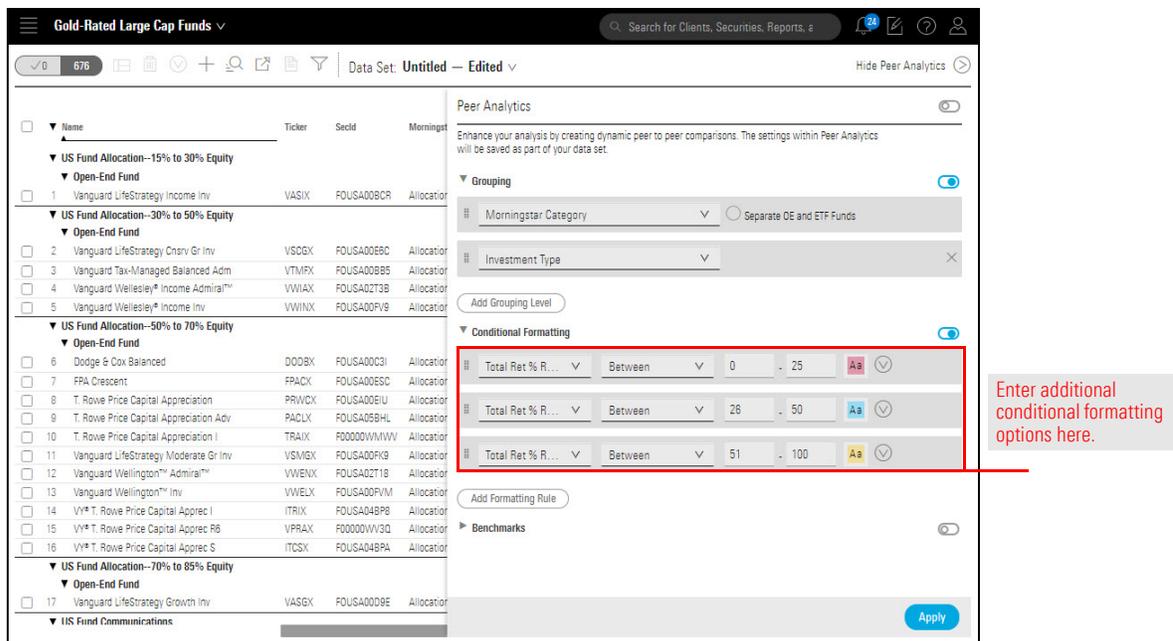
Name	Ticker	SecId	Morningstar
US Fund Allocation--15% to 30% Equity			
Open-End Fund			
1 Vanguard LifeStrategy Income Inv	VASIX	FOUSA00BCR	Allocation
US Fund Allocation--30% to 50% Equity			
Open-End Fund			
2 Vanguard LifeStrategy Chrov Gr Inv	VSDGX	FOUSA00E9C	Allocation
3 Vanguard Tax-Managed Balanced Adm	VTMPX	FOUSA00B8E	Allocation
4 Vanguard Wellesley* Income Admiral™	VWIAK	FOUSA02T3B	Allocation
5 Vanguard Wellesley* Income Inv	VWINX	FOUSA00FV9	Allocation
US Fund Allocation--50% to 70% Equity			
Open-End Fund			
6 Dodge & Cox Balanced	DOOBK	FOUSA00C3J	Allocation
7 FPA Crescent	FPACX	FOUSA00ESC	Allocation
8 T. Rowe Price Capital Appreciation	PRWCX	FOUSA00E1U	Allocation
9 T. Rowe Price Capital Appreciation Adv	PACLX	FOUSA05BHL	Allocation
10 T. Rowe Price Capital Appreciation I	TRAIK	F00000W1WV	Allocation
11 Vanguard LifeStrategy Moderate Gr Inv	VSMGX	FOUSA00FK9	Allocation
12 Vanguard Wellington™ Admiral™	VWENX	FOUSA02T18	Allocation
13 Vanguard Wellington™ Inv	VWELX	FOUSA00F1M	Allocation
14 VY* T. Rowe Price Capital Apprec I	ITRIK	FOUSA04BP8	Allocation
15 VY* T. Rowe Price Capital Apprec RB	VPRAX	F00000W1ZQ	Allocation
16 VY* T. Rowe Price Capital Apprec S	ITCSX	FOUSA04BPA	Allocation
US Fund Allocation--70% to 85% Equity			
Open-End Fund			
17 Vanguard LifeStrategy Growth Inv	VASGX	FOUSA00D9E	Allocation
US Fund Communications			

Enter conditional formatting data here.

- 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.



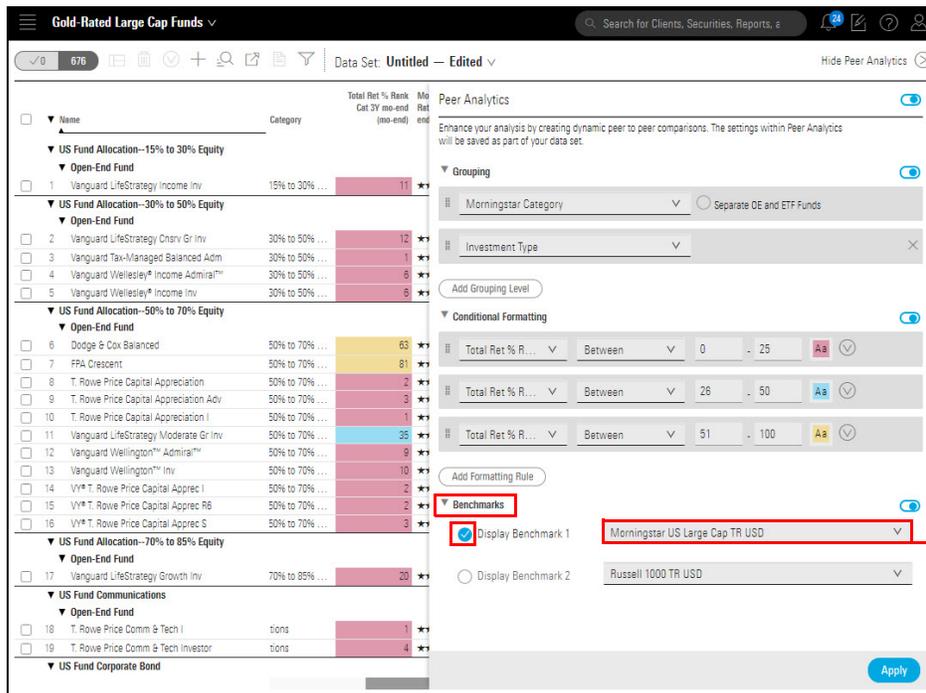
- In the text fields, type **26** and **50**.
- From the **Formatting Style** drop-down menu, select **blue**.
- From the **Rule Options Action** menu, select **Duplicate** to add a row.
- In the text fields, type **51** and **100**.
- From the **Formatting Style** drop-down menu, select **yellow**.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



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:

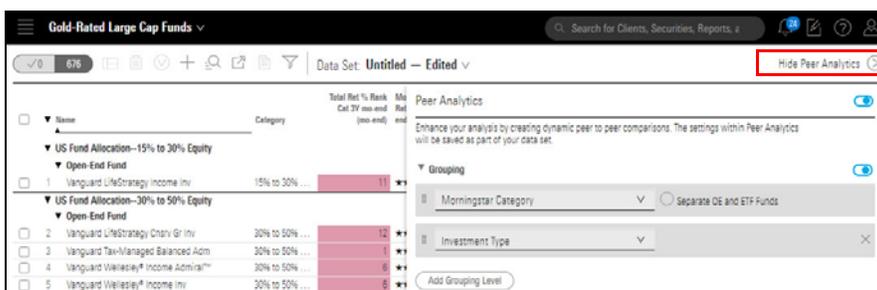
Exercise 4: Add a display benchmark to your grid

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**.



Select this option.

4. Click **Apply**.
5. Click **Hide Peer Analytics** to view your Grid.



Click this button to view your grid.

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

Your grid should appear as shown below.

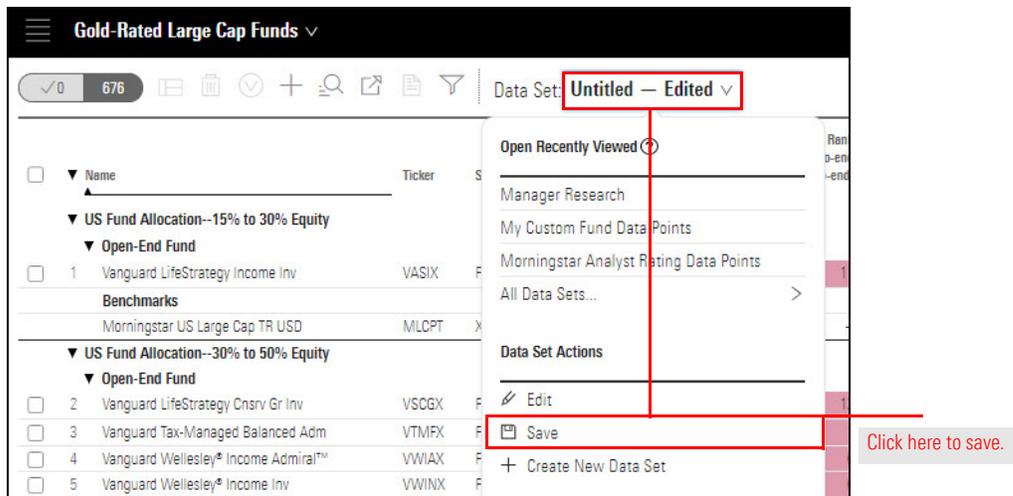
Name	Ticker	SecId	Morningstar Category	Total Ret % Rank Cat 3Y (no-end)	Morningstar Rating 3Y (no-end)	Morningstar Sustainability Rating (no-end)	Morningstar Analyst Rating (day-end)	Morningstar Category Primary Benchmark	Total Return (3Y - no-end)	Alpha TR return (3)
US Fund Allocation--15% to 30% Equity										
Open-End Fund										
1	Vanguard LifeStrategy Income Inv	VASIX	FOUSA00BCR	Allocation--15% to 30% ...	11	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	6.16	
Benchmarks										
	Morningstar US Large Cap TR USD	MLCPT	XIUSA001DW	Large Blend	--	--	--	S&P 500 TR USD	--	
US Fund Allocation--30% to 50% Equity										
Open-End Fund										
2	Vanguard LifeStrategy Cnsvr Gr Inv	VSCGX	FOUSA00E6C	Allocation--30% to 50% ...	12	★★★★	Gold	Morningstar Mod Tgt Risk TR USD	7.47	
3	Vanguard Tax-Managed Balanced Adm	VTMFX	FOUSA00B85	Allocation--30% to 50% ...	1	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	9.30	
4	Vanguard Wellesley* Income Admiral™	VWVAX	FOUSA02T38	Allocation--30% to 50% ...	6	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	8.14	
5	Vanguard Wellesley* Income Inv	VWVIX	FOUSA00FV9	Allocation--30% to 50% ...	6	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	8.07	
Benchmarks										
	Morningstar US Large Cap TR USD	MLCPT	XIUSA001DW	Large Blend	--	--	--	S&P 500 TR USD	--	
US Fund Allocation--50% to 70% Equity										
Open-End Fund										
6	Dodge & Cox Balanced	DODBX	FOUSA00C3I	Allocation--50% to 70% ...	63	★★★	Gold	Morningstar Mod Tgt Risk TR USD	7.47	
7	FPA Crescent	FPACX	FOUSA00ESC	Allocation--50% to 70% ...	81	★★	Gold	Morningstar Mod Tgt Risk TR USD	6.44	
8	T. Rowe Price Capital Appreciation	PRWCX	FOUSA00E1U	Allocation--50% to 70% ...	2	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	13.18	
9	T. Rowe Price Capital Appreciation Adv	PACLX	FOUSA05B4L	Allocation--50% to 70% ...	3	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	12.85	
10	T. Rowe Price Capital Appreciation I	TRAIK	F00000VMVVV	Allocation--50% to 70% ...	1	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	13.31	
11	Vanguard LifeStrategy Moderate Gr Inv	VSMGX	FOUSA00FK9	Allocation--50% to 70% ...	35	★★★★	Gold	Morningstar Mod Tgt Risk TR USD	8.73	
12	Vanguard Wellington™ Admiral™	VWVNX	FOUSA02T18	Allocation--50% to 70% ...	9	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	10.60	
13	Vanguard Wellington™ Inv	VWVEX	FOUSA00FVM	Allocation--50% to 70% ...	10	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	10.51	
14	VY* T. Rowe Price Capital Apprec I	ITRIX	FOUSA04BFB	Allocation--50% to 70% ...	2	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	13.25	
15	VY* T. Rowe Price Capital Apprec R6	VPRAK	F00000WV3Q	Allocation--50% to 70% ...	2	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	13.26	
16	VY* T. Rowe Price Capital Apprec S	ITCSX	FOUSA04BPA	Allocation--50% to 70% ...	3	★★★★★	Gold	Morningstar Mod Tgt Risk TR USD	12.88	
Benchmarks										
	Morningstar US Large Cap TR USD	MLCPT	XIUSA001DW	Large Blend	--	--	--	S&P 500 TR USD	--	

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.



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



Enter a name to save changes

Managed Investments Enhanced

Peer analytics will be saved as part of this data set.

Cancel Save

Enter a name here.

3. Click **Save**.