

Principia® News January 2012

**New Morningstar Analyst Rating and Global Fund Report**

We're excited about the introduction of the Morningstar Analyst Rating, a new forward-looking, analyst-driven global fund rating, to the Principia product line. The new five-tiered Morningstar Analyst Rating scale has three positive levels—Gold, Silver, and Bronze—in addition to Neutral and Negative ratings. Analysts arrive at a rating through an evaluation of five key pillars they believe are crucial to predicting the future success of a fund, considering both quantitative and qualitative factors: People, Process, Parent, Performance, and Price. Morningstar analysts score these five pillars as Positive, Neutral, or Negative and combine these scores to arrive at an overall rating. In addition to the rating, we also launched a new Global Fund Report, designed specifically for advisors. It includes written analysis for each of the five pillars underlying the Analyst Rating, as well a full array of current and historic data. To learn how to access this new information, please call 866 812-5192.

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**Morningstar Investment Conference (MIC) and Advisor User Forum**

Don't miss out on early bird pricing for the Morningstar Investment Conference and Advisor User Forum on June 20–22. The Advisor User Forum is an all-day event, held on June 20th in our Chicago headquarters. An exclusive event for our Principia, Advisor Workstation, Quotespeed, and Morningstar Office subscribers, the Advisor User Forum provides direct access to our Morningstar analysts and product teams. It's followed by the Morningstar Investment Conference, an event that brings together leaders across the investment industry. This year's keynote presenters include Michael Hasenstab, senior vice president, Franklin Templeton Fixed Income Group, and George Gatch, CEO of the Investment Management Americas, J.P. Morgan Asset Management. Call 866 839-9729 to register now and receive discounted pricing for both events.

Best regards,



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