

Principia® News April 2012

Enhancements to Principia

This month we added some additional functionality to our Portfolio Mode and Closed-End Fund module. We included another user request to display both the name and ticker when adding securities to an existing portfolio in the Portfolio Mode. In our Closed-End Fund module, we added additional data points, including the new Morningstar Analyst Rating for Closed-End Funds. These allow you to search and screen a closed-end fund based on more criteria. The addition of the new rating is the first step toward incorporating qualitative analysis in our closed-end fund product. To learn more about these changes, please check out our training site (<http://principia.morningstar.com/Training/>) or call our Product Support team at 312 424-4288.

Reminder on Upcoming Morningstar Events

Don't forget to register for the 7th annual Advisor User Forum. It is an exclusive event for our advisor subscribers and hosted at our Chicago headquarters. It is a great way for you to get one-on-one access to our product and analyst teams. To learn more about the sessions, go to <http://advisor.morningstar.com/enterprise/images/Agenda.pdf>. In addition, the Morningstar Investment Conference immediately follows the Advisor User Forum, starting the afternoon of June 20 and ending June 22. With a focus on providing advisors with knowledge, insights, and resources, the conference will address key financial topics, investment strategies, and perspectives on the economy. To register for these upcoming events, please call 866 839-9729.

Training Resources

If you have not already, be sure to check out our Customer Education and Training site (<http://principia.morningstar.com/Training/>). Get access to our online training schedule, previously recorded sessions, short tutorials and white papers on various Principia and Morningstar methodology topics to maximize your current subscription. Each month we offer a "Principia Hint" and include a copy of our monthly client letter from our Product Manager and any upcoming product related announcements. If you have suggestions for additional content, please call 312 424-4288.

Best regards,



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