

Principia® News May 2012

2012 Principia Client Survey

Every year we reach out to our Principia subscribers to collect feedback on how things are going with our product, support, and training teams. Our 2012 survey recently went out, and we hope you had time to provide your feedback. We are very interested in hearing what you think we do well and what areas you want us to work on improving. If you have not had a chance to reply or did not receive the survey, please go to our Customer Education and Training site (<http://principia.morningstar.com/Training/>) and you will find the link to the survey at the top of the page. We thank you in advance for taking the time to help us learn what you need from Principia and our other Morningstar products.

Latest Enhancements

This month we added a new data point and asset class. In our Separate Accounts module, we have included the “ETF managed portfolios” data point, which represents investment strategies that typically have more than 50% of portfolio assets invested in ETFs. We also added a new US broad asset class—Sector Stock. This change reflects the evolving nature of sector indexes and sector funds. Many sector funds and indexes include global market participants rather than solely domestic companies. In addition, we have updated our Investment Comparison Report after getting feedback from our clients. We now include standard deviation and Sharpe ratio in our risk/return detail section. To view more information on the latest Principia updates, please visit our Customer Education and Training site (<http://principia.morningstar.com/Training/>) or call our product support team at 312 424-4288.

Reminder on Morningstar Investment Conference and Advisor User Forum

We will be hosting our annual MIC and Advisor User Forum from June 20–22 in Chicago. The Advisor User Forum begins the morning of June 20 at our Chicago headquarters and is exclusively for Morningstar software clients. It gives you direct access to our analysts, product teams, and training. The MIC begins on the afternoon of June 20 at McCormick Place in Chicago and is a great way for you to interact with industry leaders and stay abreast of hot topics. To register for these events, please call 866 839-9729.

Best regards,



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