

Principia® News June 2012

Latest Principia Enhancements

This month we incorporated updates from our Morningstar research team and added some client requests. Our ETF analyst team creates a new report for each ETF that is launched in the market. This new ETF launch report includes a broader, macro-level view of the ETF at the point of launch. This new report is available under the analysis section within the ETF module, and will result in a significant increase in analytical coverage for the ETF universe. In addition, our mutual fund analyst team recently released the 2012 target date industry survey, which is now included in Analyst Mode. From your requests, we enabled the ability to display the list of securities “By Market Value” (instead of just the default “By Name”) in both our Client Position by Portfolio and Client Position by Security reports. To see all of this month’s Principia updates, please visit our Customer Education and Training page (<http://principia.morningstar.com/Training/>) or call 312 424-4288.

Presentations and Education Content Update—July 2012 Updates

The Principia Presentations and Education module is a collection of communication resources developed to assist advisors during client interactions. Specialized presentations introduce time-tested investment principles, while Sales Ideas/marketing handouts address common retirement and investment risks. Next month, three presentations will be updated with 2011 year-end data: Investing in Frontier Markets, Real Estate Investing, and Sector Investing. In addition, a new presentation called Exchange-Traded Funds will be added. This presentation highlights features that are unique to ETFs, such as the creation/redemption mechanism and the premium/discount phenomenon. It also compares ETFs with other securities, and delves deeper into three specific ETF types: commodity, leveraged/inverse, and exchange-traded notes. To learn more, call 866 608-9571.

Additional Capabilities from Morningstar

As a Principia subscriber, you already know how Morningstar helps your business. However, you may not know that we also offer a web-based, comprehensive solution that can streamline additional practice-management tasks. Morningstar Office provides impactful performance reports that break down actual investment results, a secure portal to exchange documents and reports, and customer relationship management tools to keep all your accounts organized. With Morningstar Office, you can conveniently schedule batch reports and utilize direct importing from more than 50 sources or utilize our Back Office Services team to outsource your import and reconciliation tasks. Call 800 886-9592 for more information and a free trial today.

Best regards,



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