

Principia® News July 2012

2012 Client Survey Results

Thanks to all of you who responded to our 2012 Client Survey. We are happy to report that overall satisfaction with Principia remained high. While we are pleased with the overall results, we also recognize some important areas to improve upon, including overall usability and continued improvements in getting the information to you. In the coming weeks we will be reaching out to some of you to get more information on ways we can improve Principia and your overall Morningstar experience. We value each of you and look forward to exceeding your expectations over the next year. If you have any additional feedback you want to share, please email us (principia@morningstar.com).

July Enhancements

Our Presentations and Education module has released its quarterly updates and added three presentations with 2011 year-end data: Investing in Frontier Markets, Real Estate Investing, and Sector Investing. In addition, a new presentation called Exchange-Traded Funds was added. We also launched the redesigned web reports. Covering mutual funds, closed-end funds, ETFs, and stocks, these web reports offer a more organized layout to make it easier for you to use. To see what else is new with Principia, visit our training site (<http://principia.morningstar.com/Training/>) or call 312 424-4288.

Save Time and Money

If you are not already taking advantage of our eDelivery and payment plan options, here are two reasons why you should—it saves you time and money. Our eDelivery subscriptions are the best value we offer. You get the monthly updates as soon as they are available, and eDelivery costs less than a disc subscription. Our payment plan option saves you time and phone calls (or mail) each year to pay for your subscription. It also spreads out your payments across the year, which allows you to budget your expenses. To get more information on our eDelivery and payment plan options, call 866 812-5192.

Best regards,



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