

Morningstar® Principia®

For more information:
 Call 866 215-2511
 Email sales@morningstar.com

For more than 15 years, Morningstar® Principia® has been a trusted resource for financial professionals. It provides the tools for in-depth investment research and portfolio analysis and serves as an invaluable resource for historical research projects. In addition, its CAMS module offers portfolio accounting capabilities for managing your performance reporting, and our Back Office Services team can free up your internal resources. Whether you are looking to improve your workflow with better security screening tools, need easy-to-understand client reports, or simply want to save time and money, Morningstar Principia can do the job.

Comprehensive Portfolio Management and Research Capabilities

Manage all of your ongoing research and portfolio needs with Principia. With 12 different modules that provide in-depth coverage of mutual funds, stocks, variable annuities, exchanged-traded funds, closed-end funds, separate accounts, and indexes, it's easy to configure the best solution for your business. Batch reporting capabilities add insight and efficiency to client reports, such as the Portfolio Snapshot, Portfolio Comparison, and Investment Detail reports.

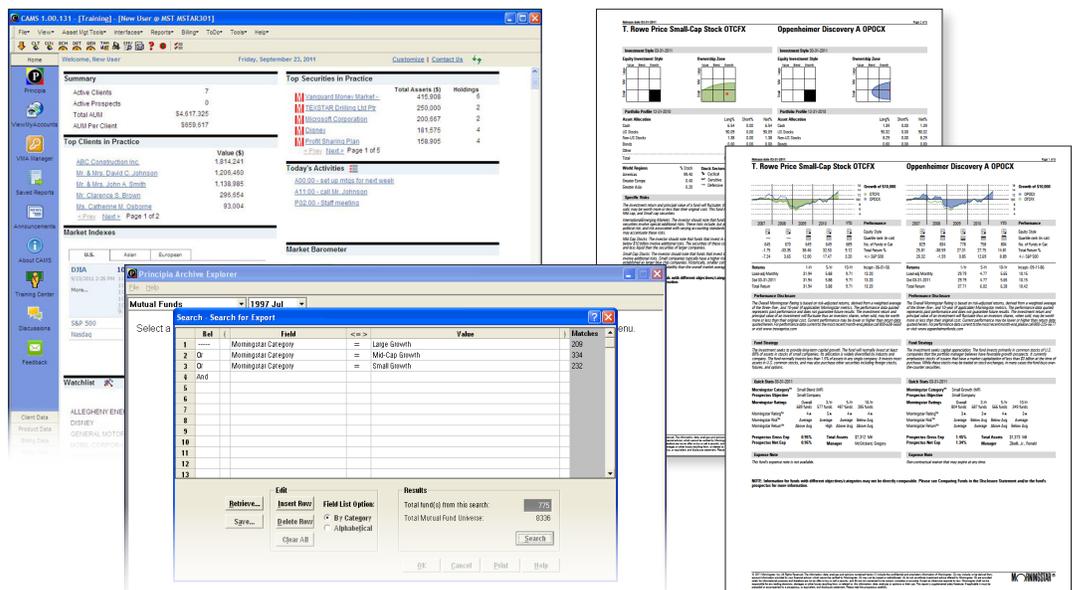
Advanced Performance Reporting and Back Office Service

Principia CAMS provides the portfolio accounting, performance reporting, and client-management tools you need to effectively run your practice. A new home page and client portal provide online capabilities with desktop performance and reliability. You can also leverage the expertise of our Back Office Services team to ensure that your data is accurate with a one-time data analysis, or have the team actively manage your ongoing data management and reconciliation needs.

Simplified Historical Data Research

If you need access to all of our historical data or just a few time periods, securities, or data points, Principia offers three historical data choices—Archive Explorer, Custom Data Set, and One-Time Historical Releases. Each historical Principia release provides a unique “point-in-time” snapshot of a specific month-end period and allows you to create a longitudinal data set that is free of survivorship bias. Principia provides the best way to accurately assess relative performance at any point in the past.

Principia and its CAMS module provide comprehensive solutions for performance reporting, research, and historical analysis.



Free In-House Support

Principia is fully supported by highly trained Morningstar staff—your call is never outsourced. Call or email with questions regarding your subscription, to request technical assistance, or for suggestions on how to use and interpret Morningstar data. Support is available from Monday to Friday, except for market holidays.

Extensive Training Available

Whether you prefer live training, recordings of previous webinars, tutorials for shorter versions of specific Principia topics, or materials you can print for offline, we have it all on our Customer Education and Training site (<http://principia.morningstar.com/training/>).

Try Principia Risk Free

Join the thousands of advisors who rely on Principia to meet the challenges of building a successful business. You can depend on the name that has set the industry standard for powerful, insightful, easy-to-use software—Morningstar Principia.

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Principia's 30-day, money-back guarantee means you can find out if it's right for your practice—at no risk to you.

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To see product tutorials and sample Principia reports, get online product updates, or sign up for training sessions, visit: global.morningstar.com/principia.

Principia® Modules

Mutual Funds
Mutual Funds Advanced* (includes analyst reports)
Stocks Advanced* (includes analyst reports)
Variable Annuities/Life Subaccounts Advanced*
Exchange-Traded Funds*
Closed-End Funds*
Separately Managed Accounts*
Hypotheticals*
Defined Contribution Plans
Asset Allocation
Presentations & Education*

* These modules are included in the Principia Suite

Research Capabilities

Investment screening and ranking tools
Saved lists and searches
Custom layout and sorting
Complete fund holdings
Rank by stock or bond
Morningstar Analyst Reports
Investment Detail™ Reports
Investment Comparison Reports
Customizable color graphs
Export to Excel®

Portfolio Management Capabilities

Morningstar Portfolio Snapshot™ Report
Morningstar Portfolio Comparison Report
Stock Intersection™ Report
Importing capabilities from popular portfolio management systems
Blended custom benchmarks
Client, portfolio, and holdings alerts
Customizable color graphs

Asset Allocation Features

Flexible capital market assumptions
Custom asset classes
Efficient frontier modeling
Monte Carlo simulation
Detailed Asset Allocation Report

Defined Contribution Plans

Lineup diversification and performance analysis
Plan and fund level expense analysis
Triggered Alerts Report
Single Plan Report
Plan Comparison Report
Investment Policy Statement

Client Support Services

Free product and technical support
Free video product tutorials
Web and custom training