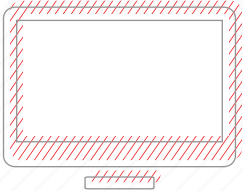
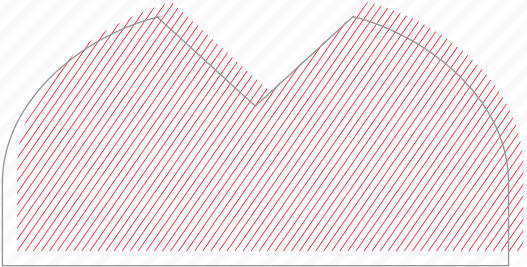
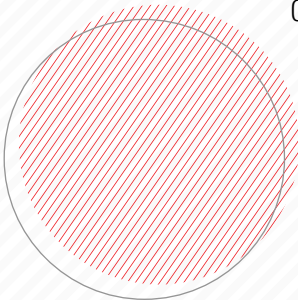
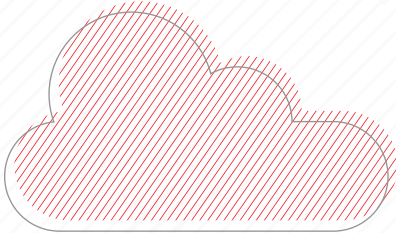
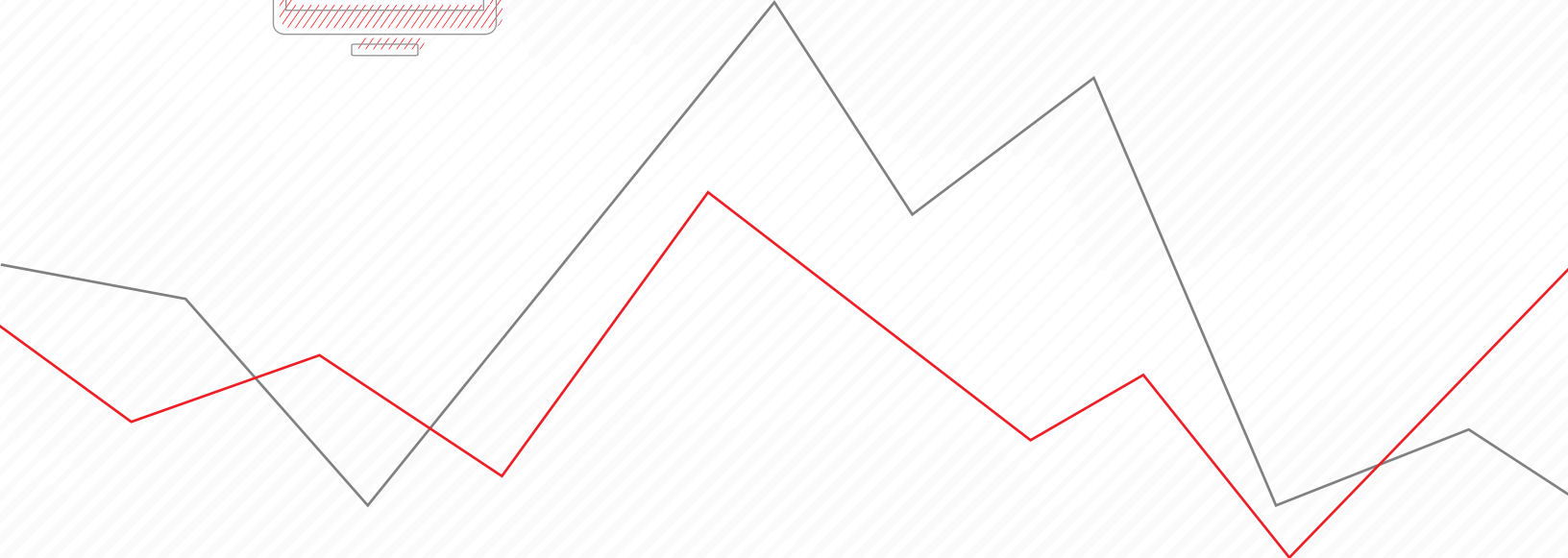


# Leveraging Company-Level ESG Data: Product Manager at an Asset Management Firm

Onboarding Guide



MORNINGSTAR Direct



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# Leveraging Company-Level ESG Data: Product Manager at an Asset Management Firm

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Company-level ESG data is used to find the holdings driving fund-level scores and ratings. This data allows investors to conduct analysis on investments. In addition, this data serves as the building blocks of fund-level sustainability data points, such as the Morningstar Sustainability Rating™. A selection of company-level data points are available as part of a Morningstar Direct subscription.

## Overview

This workshop shows users how to use Morningstar Direct<sup>SM</sup> to find research from Morningstar on the topic of product involvement and exclusionary practices, investigate client accounts to find companies not aligned with their principles, and find more suitable replacements. Learning about this content and capabilities will make it easier for users to serve values-based investors.

This exercise guide covers the following topics:

- ▶ [Exercise 1: Import a list \(page 6\)](#)
- ▶ [Exercise 2: Analyze a fund's sustainability data \(page 7\)](#)
- ▶ [Exercise 3: Create a Performance Report \(page 9\)](#)
- ▶ [Exercise 4: Change the settings for the group \(page 10\)](#)
- ▶ [Exercise 5: Set the values for the Time Periods tab \(page 14\)](#)
- ▶ [Exercise 6: Update the rank data point \(page 16\)](#)
- ▶ [Exercise 7: Select data points in the Supplementary Columns window \(page 17\)](#)
- ▶ [Exercise 8: Save the performance report \(page 20\)](#)
- ▶ [Exercise 9: Calculate the performance report \(page 21\)](#)
- ▶ [Exercise 10: Apply Conditional Formatting \(page 22\)](#)
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- ▶ [Exercise 12: Create a Presentation Studio report \(page 26\)](#)

## Analyzing a Fund's Sustainability Data

John is a product manager at an Asset Management firm and is working to market their five-globe funds. He uses Presentation Studio to create marketing collateral for the wholesale team. John needs to analyze the funds he manages and determine which ones have a five-globe rating.

He also needs to track the funds with less than a four-globe rating in a report and determine if he needs to replace any fund holdings with high levels of ESG risk.

The following exercises are covered in this section:

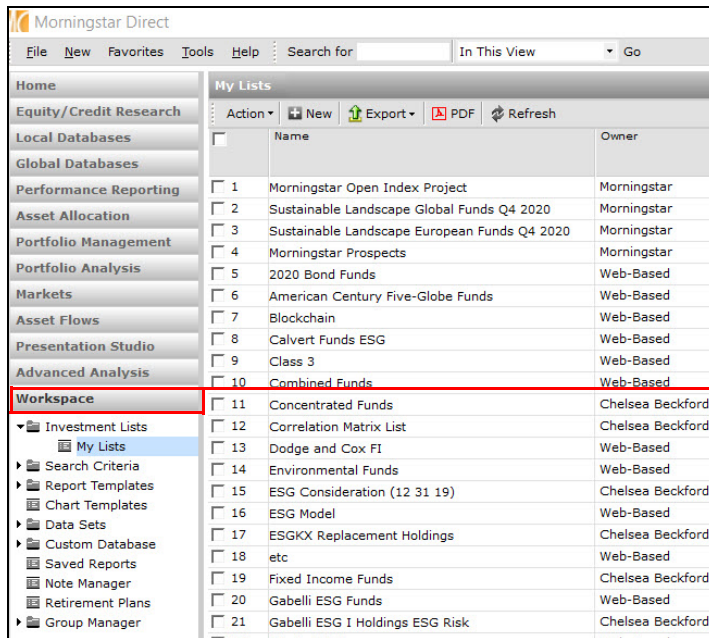
- ▶ [Analyze a fund's sustainability data on page 7](#)
- ▶ [Create a Performance Report on page 9](#)
- ▶ [Change the settings for the group on page 10](#)
- ▶ [Set the values for the Time Periods tab on page 14](#)
- ▶ [Update the rank data point on page 16](#)
- ▶ [Select data points in the Supplementary Columns window on page 17](#)
- ▶ [Save the performance report on page 20](#)
- ▶ [Calculate the performance report on page 21](#)
- ▶ [Apply Conditional Formatting on page 22](#)
- ▶ [Investigate a fund's holdings on page 23](#)

### Overview

This section shows users how to import the [Boston ESG list](#) containing the holdings they manage, which saves time and potential error from entering them manually. To import a list, do the following:

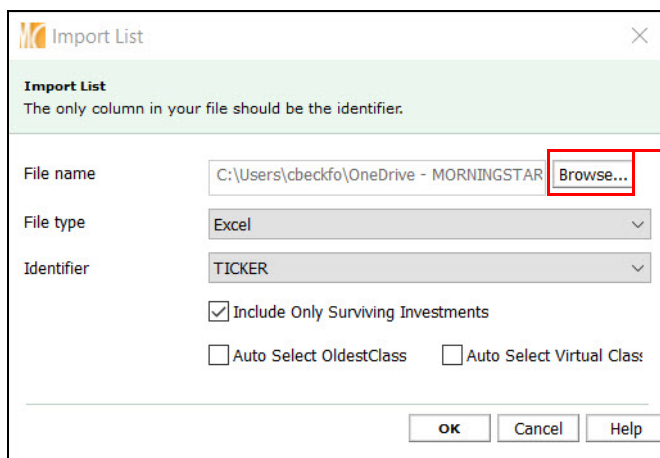
**Exercise 1: Import a list**

1. Log into the **desktop access point of Morningstar Direct**.
2. Click the **Workspace** module.



Click the Workspace module.

3. Click **New**. The Select Investments window opens.
4. Select **Import List**, then click **OK**. The Import List window opens.
5. Click **Browse...** and navigate to the **Boston ESG list** file.



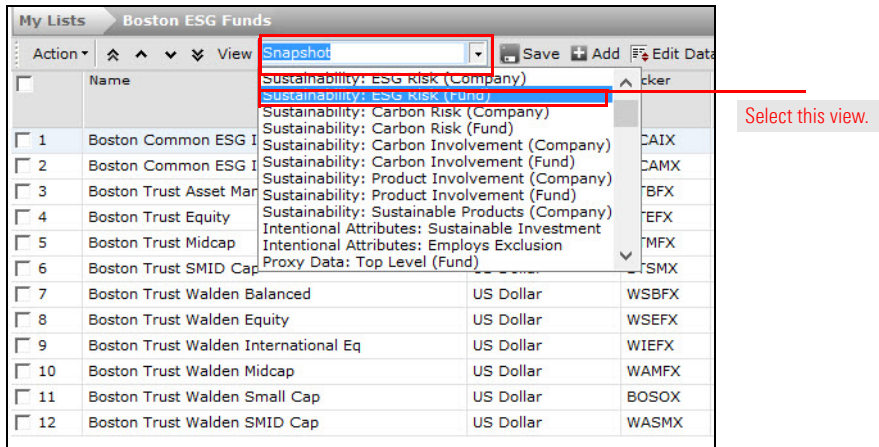
Select the downloaded Boston ESG file.

6. Click **OK**. The investments load in the grid.
7. From the toolbar, click **Save**.
8. Name the list **Boston ESG Funds**.

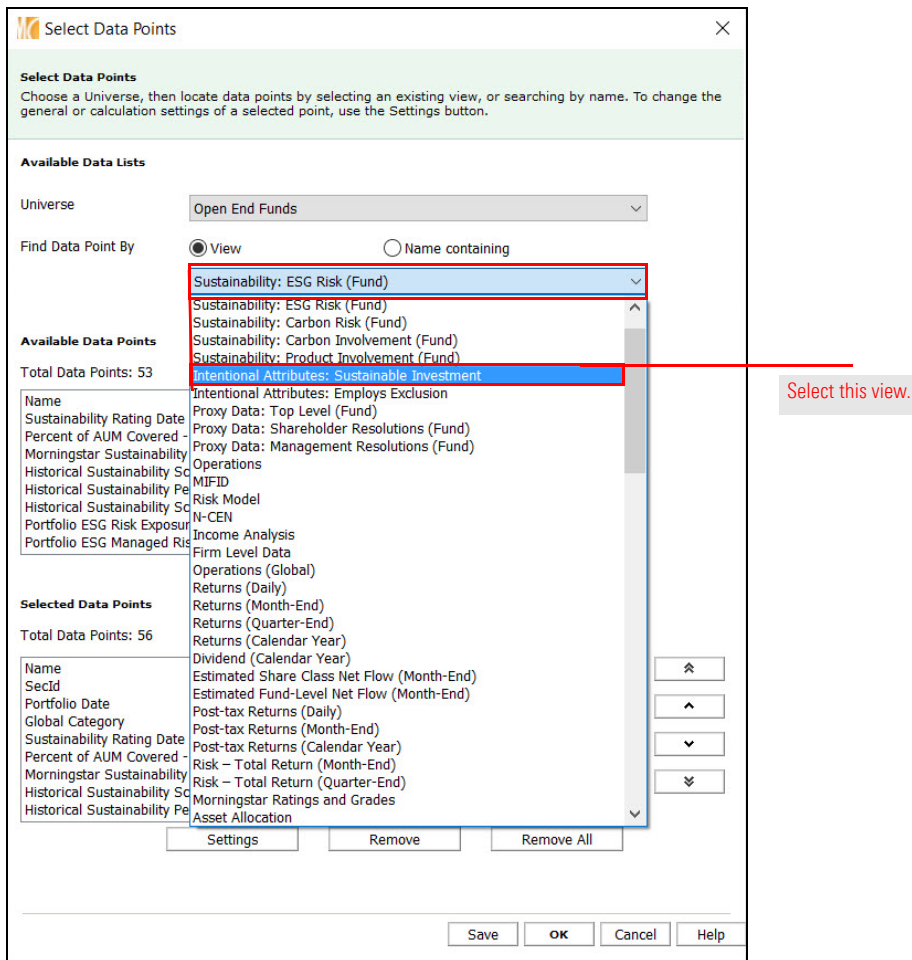
With the Boston ESG list imported, the following exercise shows the user how to analyze fund-level sustainability data in the grid. Do the following:

**Exercise 2: Analyze a fund's sustainability data**

1. From the **View** drop-down, select **Sustainability: ESG Risk (Fund)**.



2. From the toolbar, click **Edit Data**.
3. From the **View** drop-down, select **Intentional Attributes: Sustainable Investment**.



4. Select **Sustainable Investment - Overall**.
5. Click **Add**. The data point is added to the Selected Data Points area.
6. In the Selected Data Points area, **scroll down** and click **Sustainable Investment - Overall**, then click the **up arrow** to move it below Morningstar Sustainability Rating.

Note the highlighted areas.

7. Click **OK**.
8. Answer the following questions:

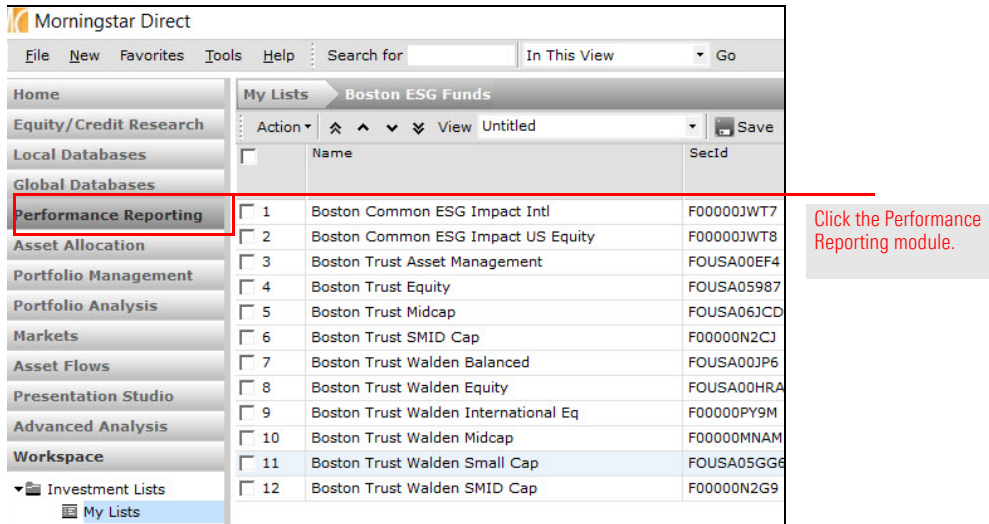
Which funds received a 5 globe rating?	
Which funds are intentionally sustainable?	



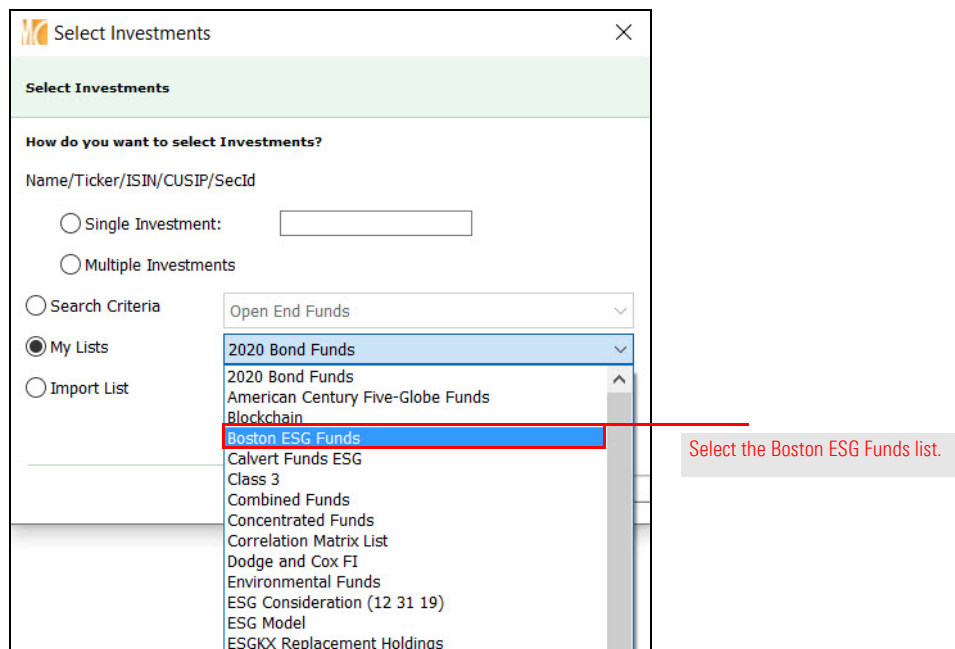
In the following exercise, users will create a performance report to further investigate the funds. A Performance Report allows users to add conditional formatting to highlight specific criteria. Do the following:

### Exercise 3: Create a Performance Report

1. Click the **Performance Reporting** module. The Performance Reporting module opens.



2. From the toolbar, click **New**. The Select Investments window opens.
3. Select the **My Lists** option, then select **Boston ESG Funds**.



4. Click **OK**. The Group Settings window opens.

By default, when examining the peer group rank performance of funds in a performance report, Morningstar Direct compares the funds only to the others in the selected list, rather than all potential funds in the peer group, such as the Morningstar Category. This section shows users how to change the peer group for a set of funds to include all funds from each category for comparison purposes when calculating rank values.

**Exercise 4: Change the settings for the group**

To change the peer group settings for a performance report, do the following:

1. Check the **Select All** box in the header row. Having all groups selected ensures the subsequent changes made in this exercise apply to all groups. Without selecting all groups first, these steps would have to be repeated for each row.
2. In the Peer Group column for row 1, click the **Peer Group** icon. The Peer Group dialog box opens.

Check this box to select all groups (and rows within those groups).

Click this icon to change the Peer Group value.

**Group Settings**

The group settings dialog is used to organize a list of investments into groups for comparison against peer groups and selected benchmarks. Peer groups can be defined using existing investment lists or search criteria.

**Group By**  Recently Used  Custom Database  Search

Available Grouping: Morningstar Category Update

**Current Grouping** Morningstar Category

	Display Groups/Investments	# of Investments in Display Group	Peer Group	# of Investments in Peer Group	Display Benchmark 1	Display Benchmark 2	C
<input checked="" type="checkbox"/>	1 ▶ US Fund Foreign Large Blend	2	Display Group	2	S&P 500 TR	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	4 ▶ US Fund Large Blend	3	Display Group	3	S&P 500 TR	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	8 ▶ US Fund Mid-Cap Blend	4	Display Group	4	S&P 500 TR	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	13 ▶ US Fund Allocation--70% to 85% Equity	2	Display Group	2	S&P 500 TR	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	16 ▶ US Fund Small Blend	1	Display Group	1	S&P 500 TR	MSCI EAFE USD	Si

3. Select the **Morningstar Category** option.

**Peer Group** [X]

**Define Peer Group Dialog**  
This dialog is used to define the peer group.

**How do you want to define peer group?**

Use Display Group

Search Criteria Open End Funds

My Lists

**Morningstar Category**

Morningstar Category + Search Criteria Open End Funds

This option will select the relevant category/sector for each grouping

Buttons: Help, OK, Cancel

Use this option to compare the funds from the search to all other funds in their Morningstar Category.

4. Click **OK** to close the dialog box. The values in the # of Investments in Peer Group column are updated.
5. In row 1, from the **Display Benchmark 1** drop-down field, select **Morningstar Index**. The selection is applied to all rows.

**Group Settings** [X]

**Group Settings**  
The group settings dialog is used to organize a list of investments into groups for comparison against peer groups and selected benchmarks. Peer groups can be defined using existing investment lists or search criteria.

**Group By**  Recently Used  Custom Database  Search

Available Grouping: Morningstar Category Update

**Current Grouping** Morningstar Category

	Display Groups/Investments	# of Investments in Display Group	Peer Group	# of Investments in Peer Group	Display Benchmark 1	Display Benchmark 2	C
<input checked="" type="checkbox"/>	1 ▶ US Fund Foreign Large Blend	2	Morningstar Category	793	Morningstar Index	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	4 ▶ US Fund Large Blend	3	Morningstar Category	1534	Morningstar Category A	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	8 ▶ US Fund Mid-Cap Blend	4	Morningstar Category	424	Morningstar Index	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	13 ▶ US Fund Allocation--70% to 85% Equity	2	Morningstar Category	341	MPT Index	MSCI EAFE USD	Si
<input checked="" type="checkbox"/>	16 ▶ US Fund Small Blend	1	Morningstar Category	677	S&P 500 TR	MSCI EAFE USD	Si

Select this option to assign the corresponding Morningstar Index to each category in the performance report.

- To see what the benchmark is for each category, from the toolbar, click **Show Benchmarks**. The Display Benchmark 1 column updates.

Click this icon to see the name of each index for each group to appear on the report.

Display Groups/Investments	# of Investments in Display Group	Peer Group	# of Investments in Peer Group	Display Benchmark 1	Display Benchmark 2
1 US Fund Foreign Large Blend	2	Morningstar Category	793	Morningstar Gbl Mkts	MSCI EAFE USD
4 US Fund Large Blend	3	Morningstar Category	1534	Morningstar US Larg	MSCI EAFE USD
8 US Fund Mid-Cap Blend	4	Morningstar Category	424	Morningstar US Mid	MSCI EAFE USD
13 US Fund Allocation--70% to 85% Equity	2	Morningstar Category	341	Morningstar US Mod	MSCI EAFE USD
16 US Fund Small Blend	1	Morningstar Category	677	Morningstar US Sma	MSCI EAFE USD

- Scroll right to see the Display Benchmark 2 column. By default, both display benchmarks are shown in the performance report. To ensure only the first benchmark is displayed, from the toolbar, click **Report Settings**. The Report Settings dialog box opens.
- To hide Display Benchmark 2, uncheck the **Show display benchmark 2** box.

Uncheck this box to ensure only one benchmark appears on the performance report.

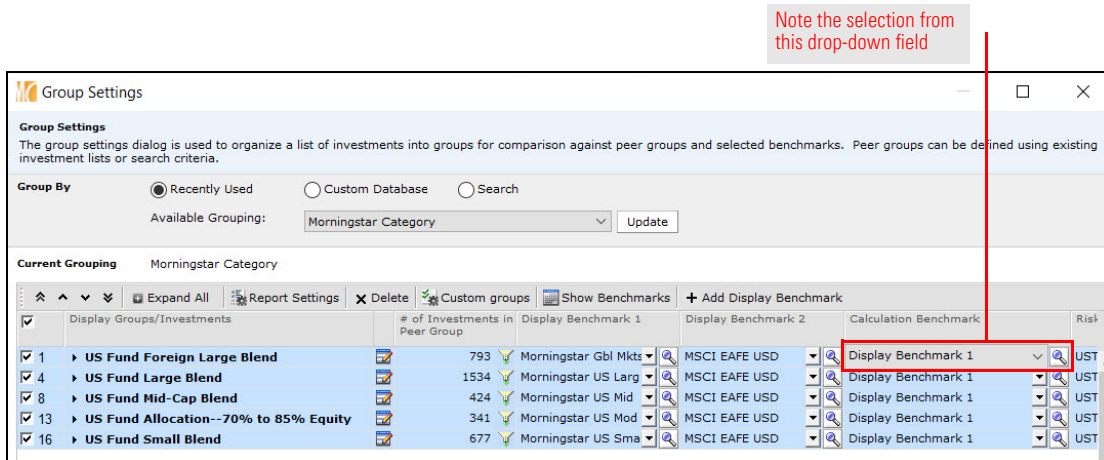
- Click **OK** to close the Report Settings dialog box.

- From the **Calculation Benchmark** drop-down field in row 1, select **Display Benchmark 1**.

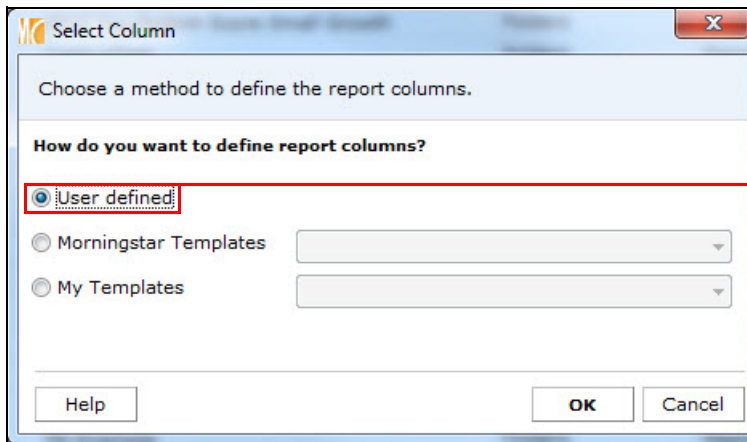
Note: It might be necessary to **scroll right** to see this column.

Selecting Display Benchmark 1 here ensures the following:

- ▶ The same benchmark is used for both display and calculation, and
- ▶ A peer-appropriate index is used for calculations.



- Click **OK** to close the Group Settings window. The Select Column dialog box opens.
- Make sure the option for **User Defined** is selected. This selection allows users to define the report columns.



- Click **OK**. The Performance Column Setup window opens.

In the next exercise, users will customize the time period for the performance report.

One objective of this performance report is to determine whether this set of funds has performed consistently well over a set of single-year periods, starting from five years ago through the last year. This exercise shows users how to set up the time periods for this analysis. Do the following:

**Exercise 5: Set the values for the Time Periods tab**

1. The Performance Column Setup window should be open, with the Time Periods tab selected. The Start Date and End Date fields reflect a five-year time period by default, but it is a static start date and will not update when the user re-opens the report. To create a dynamic start date, from the **Start Date** drop-down, **scroll up** and select **Enter Dash Code**.
2. In the **Start Date** field, enter **-y5**.
3. Click **Add Columns**. The five-year time period is added to the Selected Time Periods area at the bottom of the window.

The screenshot shows the 'Performance Column Setup' dialog box with the 'Time Periods' tab selected. The 'Time Period' section includes:
 

- Start Date:** A dropdown menu set to 'Enter Dash Code' and a text input field containing '-y5'.
- End Date:** A dropdown menu set to 'Last Month End' and a text input field containing '03/31/2021'.
- Time Periods:** Radio buttons for 'Single period' (selected), 'Rolling window', 'Trailing periods', 'Regular periods from start', 'Forward extending periods', and 'Regular periods from end'.
- Window size:** A dropdown menu.
- Number of columns:** A text input field containing '1' and an 'Add Columns' button.
- Selected Time Periods:** A list box containing '4/1/2016 - 3/31/2021 (End-y5 - Last Month End)' with up/down arrows.

 At the bottom are buttons for 'Manage Columns', 'Settings', 'Remove', 'Remove All', 'Help', 'OK', and 'Cancel'. A checkbox for 'Order time period latest first' is also present.

Review the values and settings for the highlighted fields before clicking this button, then confirm the Selected Time Periods are correct.

4. The three-year time period needs to be added. In the **Start Date** field, enter **-y3**.
5. Click **Add Columns**. The three-year time period is added to the Selected Time Periods area at the bottom of the window.
6. The one year time period needs to be added. In the **Start Date** field, enter **-y1**.
7. Click **Add Columns**. The three-year time period is added to the Selected Time Periods area at the bottom of the window.

Note: Do not click OK yet; the Ranks tabs still needs to be addressed.

**Performance Column Setup**

**Time Period Setup**  
The time periods tab is used to add, edit, or remove time periods to the performance report.

Time Periods | Data Points | Ranks

**Time Period**

Start Date: Enter Dash Code (dropdown) | **-y1** (text field) | Refresh icon

End Date: Last Month End (dropdown) | 03/31/2021 (calendar icon)

Time Periods:  Single period |  Rolling window  
 Trailing periods |  Regular periods from start  
 Forward extending periods |  Regular periods from end

Window size: [dropdown]

Number of columns: 1 (text field) | Add Columns (button)

**Selected Time Periods**

4/1/2016 - 3/31/2021 (End-y5 - Last Month End) [up arrow]  
 4/1/2018 - 3/31/2021 (End-y3 - Last Month End) [up arrow]  
 4/1/2020 - 3/31/2021 (End-y1 - Last Month End) [down arrow]

Manage Columns (button) | Settings (button) | Remove (button) | Remove All (button)

Order time period latest first

Help (button) | OK (button) | Cancel (button)

Enter this Dash Code for the last time period.

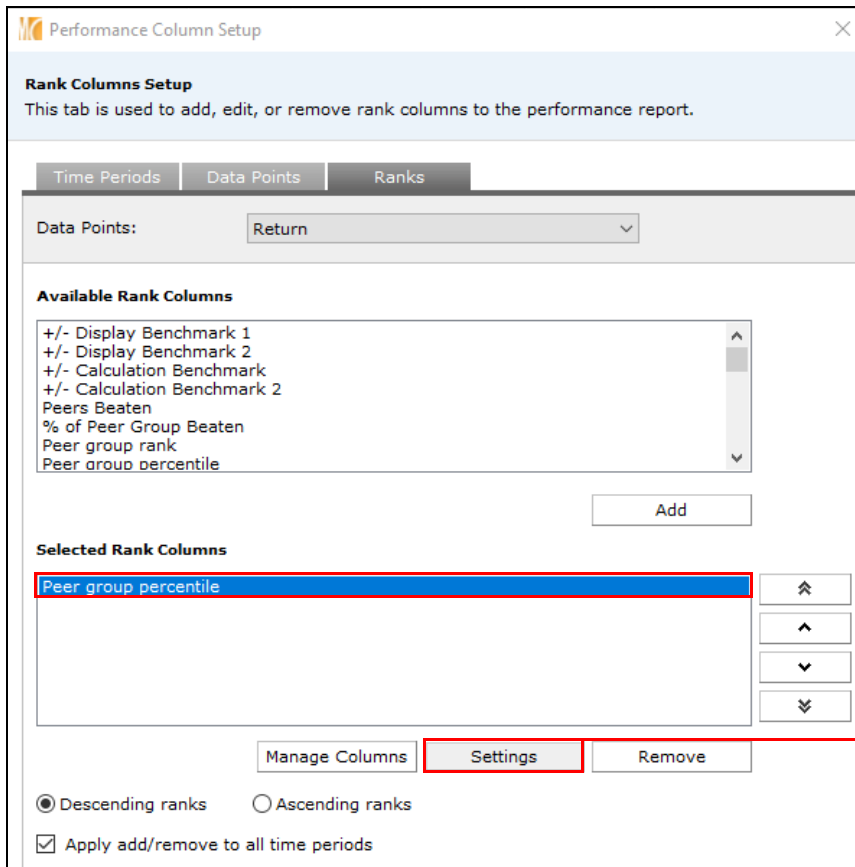
In the next exercise, users will make a change on the Ranks tab before generating the performance report.

With the general return time periods in place, one last change is needed before leaving the Performance Column Setup window. This small change to the one selected data point will make the report easier to read. Specifically, the word "percentile" will be changed to the "%" sign.

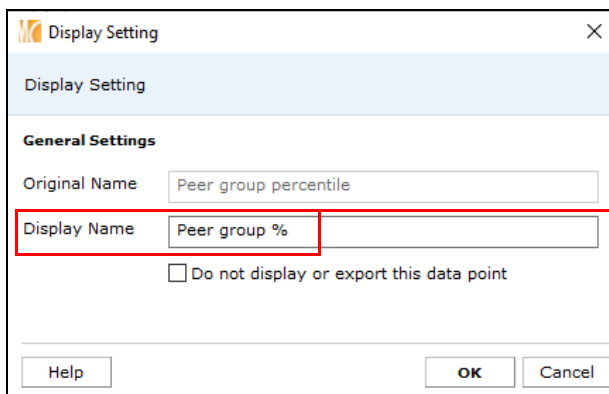
**Exercise 6: Update the rank data point**

To update the rank data point, do the following:

1. Select the **Ranks** tab.
2. From the Selected Rank Columns area, select the **Peer group percentile** data point, then click **Settings**. The Display Setting dialog box opens.



3. In the **Display Name** field, replace the word "percentile" with the % sign





4. Click **OK** to close the Display Setting dialog box.
5. Click **OK** to close the Performance Column Setup window. The Supplementary Columns window opens.

In the next exercise, users will add supplementary data points to the report.

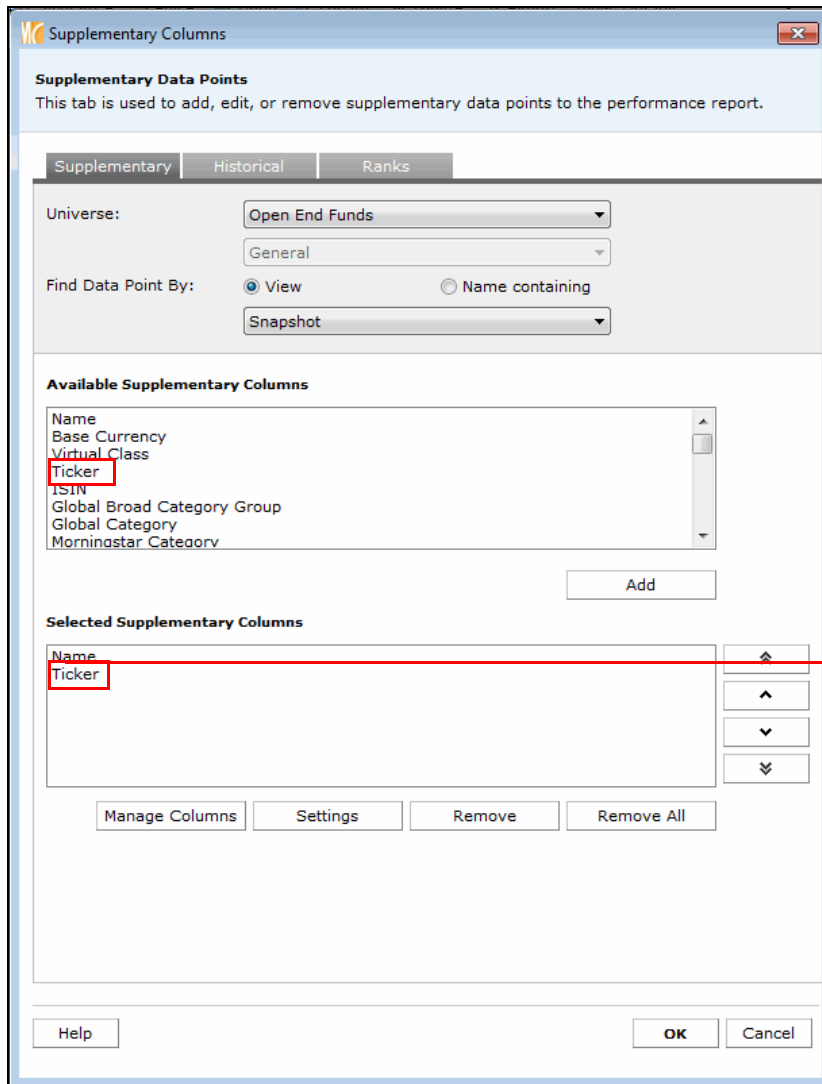
In the Performance Column Setup window, the time periods were selected and the rank data point name was updated. In this exercise, the Supplementary Columns window is used to add data points not directly related to performance. The following data points will be added:

- ▶ Ticker
- ▶ Morningstar Sustainability Rating
- ▶ Sustainability Breakpoint
- ▶ Historical Sustainability Score
- ▶ Low Carbon Designation, and
- ▶ Percent of AUM with High ESG Risk Scores.

**Exercise 7: Select data points in the Supplementary Columns window**

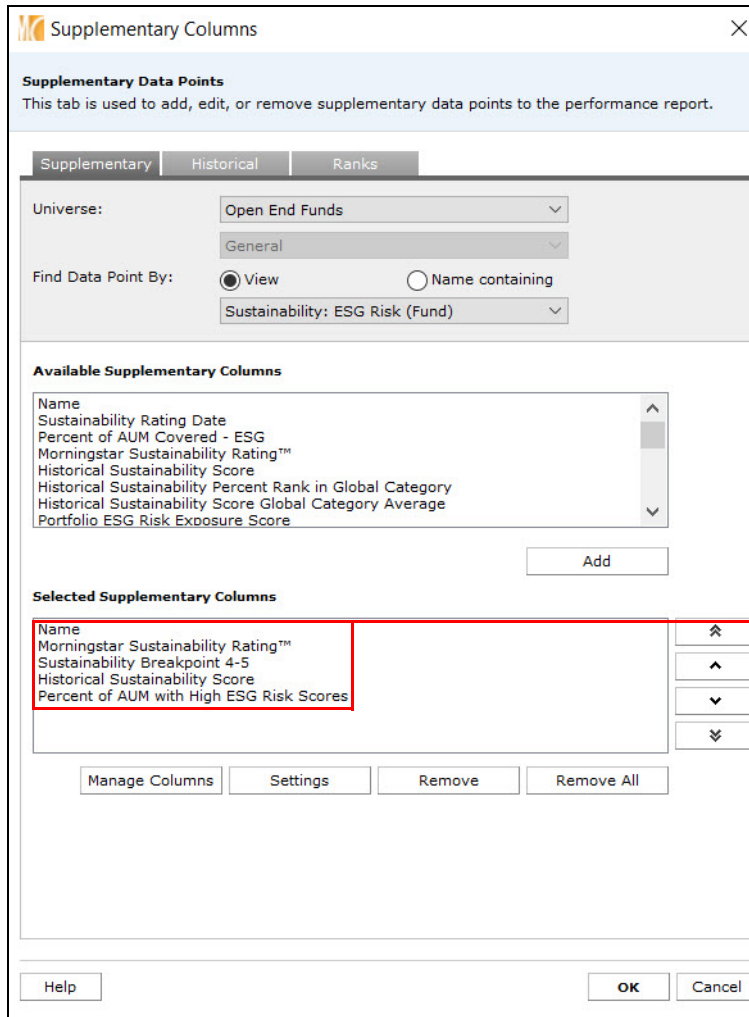
To include supplementary data points on the performance report, do the following:

1. On the Supplementary tab, in the Available Supplementary Columns area, **double-click Ticker** to move it to the Selected Supplementary Columns area.



2. From the **View** drop-down, select **Sustainability: ESG Risk (Fund)**.
3. From the Available Supplementary Columns area, **double-click Morningstar Sustainability Rating™**. The data point is added to the Selected Supplementary Columns area.
4. From the Available Supplementary Columns area, **scroll down** and **double-click Sustainability Breakpoint 4-5**.
5. From the Available Supplementary Columns area, **scroll down** and **double-click Historical Sustainability Score**.

- From the Available Supplementary Columns area, **scroll up** and **double-click Percent of AUM with High ESG Risk Scores**.



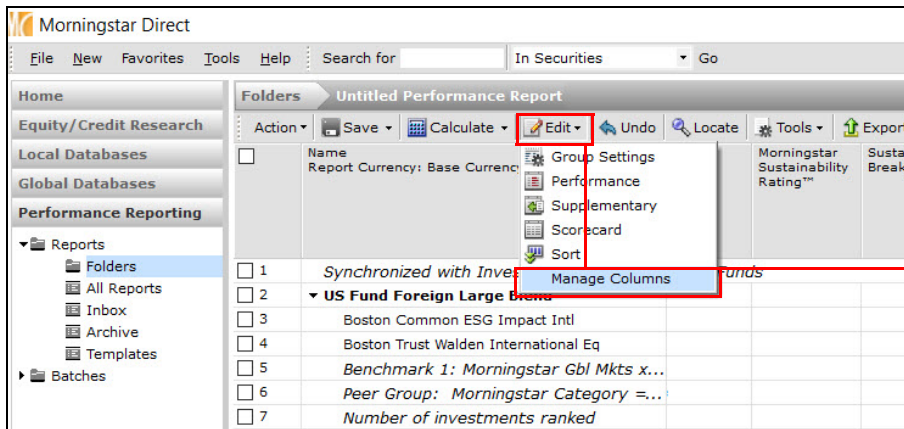
- From the **View** drop-down, select **Sustainability: Carbon Risk (Fund)**.
- From the Available Supplementary Columns area, **double-click Low Carbon Designation™**.
- Click **OK** to close the Supplementary Columns window. The performance report is displayed in the grid.

In the next exercise, users will edit the report one last time before saving it.

The parameters for the performance report are set and it is nearly ready to be saved. One last tweak, however, is needed. Note the word "percentile" was not replaced with the % sign in the peer group column for each time period. This is easily fixed, and then the report can be saved. Do the following:

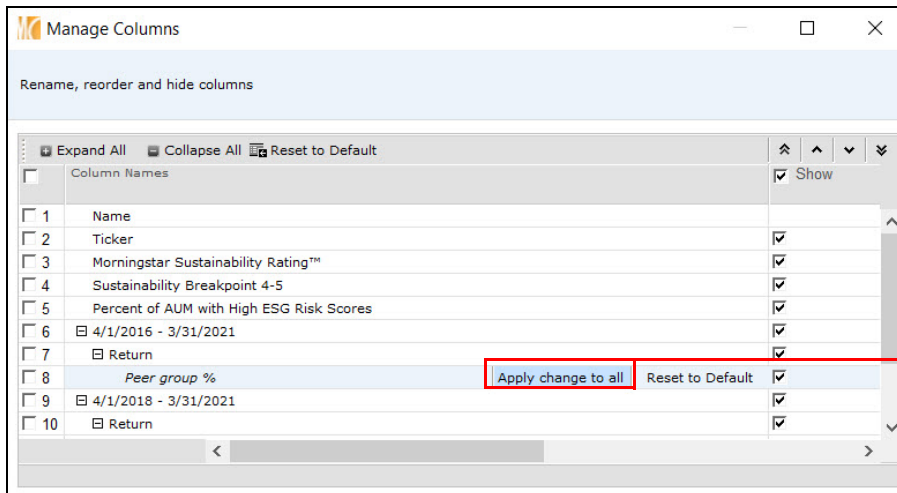
**Exercise 8: Save the performance report**

1. From the toolbar, click **Edit > Manage Columns**. The Manage Columns dialog box opens.



Select this option from the Edit icon's menu.

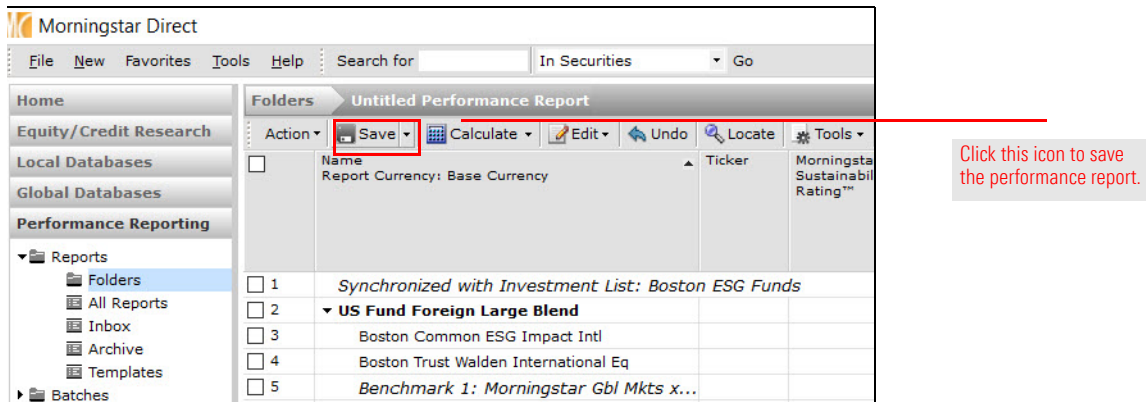
2. Hover the cursor over the row where **Peer group %** appears, then click **Apply change to all**. The name updates for all related fields on the report.



Hover the cursor over this row, then click this button.

3. Click **OK** to close the Manage Columns dialog box. The peer group columns are updated.

- From the toolbar, click **Save**. The Save Report dialog box opens.



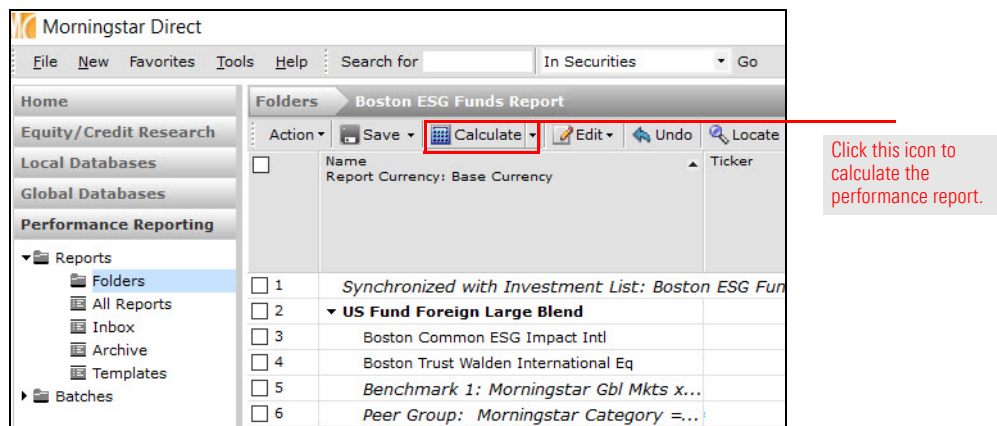
- Name the report **Boston ESG Funds Report**, then click **OK**.

In the next exercise, users will run the performance report.

Currently, only the Name column is populated; the other data columns are blank. A performance report must be calculated to display data in those columns. To calculate the report, do the following:

**Exercise 9: Calculate the performance report**

- From the toolbar, click **Calculate**. During the calculation, the performance report closes and the Folders page opens, displaying a progress bar next to the Boston ESG Funds Report.



- When the Report Calculation Complete alert opens, click **Yes** to view the report. The grid is now populated with data.

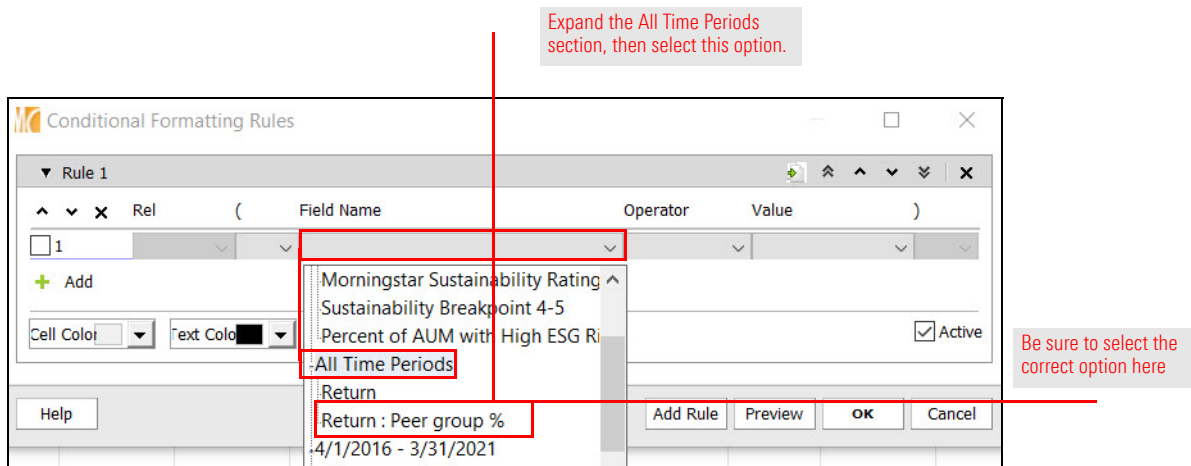
The conditional formatting feature in the Performance Reporting module allows users to add color to a row, cell, or column to enhance the interpretation of the data.

### Exercise 10: Apply Conditional Formatting

In this exercise, users will apply a color to the Peer group % column to call out the times when each fund was in the top quartile of its category across the various time periods shown.

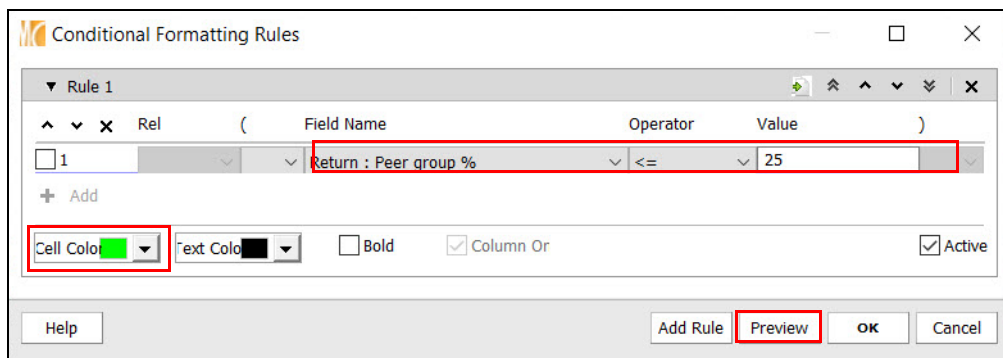
To apply conditional formatting to a performance report, do the following:

1. From the toolbar, click **Tools > Conditional Format > Conditional Formatting**. The Conditional Formatting Rules dialog box opens.
2. From the **Field Name** drop-down field, expand the **All Time Periods** section, then select **Return: Peer group %**.



3. From the **Operator** drop-down field, select **<=**.
4. In the **Value** field, type **25**.
5. From the **Cell Color** drop-down field, select **green**.
6. Click **Preview** to ensure the rule is working as expected. Cells are highlighted in the report behind the Conditional Formatting Rules dialog box.

Note the highlighted values for this rule.



7. Click **OK** to close the Conditional Formatting Rules dialog box.
8. From the toolbar, click **Save** to preserve this change to the performance report.

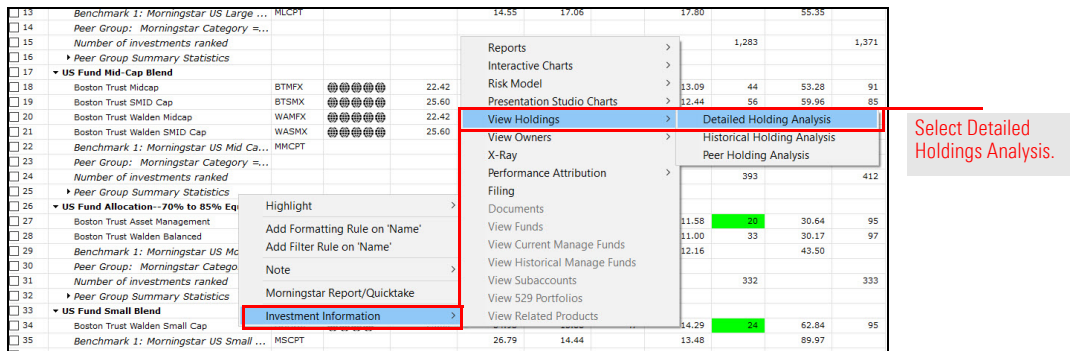
9. Answer the following questions:

Which 5-globe funds ranked in the top quartile?	
Which fund has the highest percent of AUM with high ESG Risk Scores?	

In the previous exercise, users applied conditional formatting to highlight funds ranked in the top quartile of their category. Users also identified the fund with the highest percent of AUM with high ESG Risk Scores. To investigate this particular fund's holdings, do the following:

**Exercise 11: Investigate a fund's holdings**

1. **Right-click Boston Trust Walden Small Cap.** The right-click menu opens.
2. **Hover the cursor over Investment Information > View Holdings > Detailed Holding Analysis.** The Detailed Holding Analysis window opens.



3. From the **View** drop-down on the right, select **Sustainability: ESG Risk (Company)**. The window refreshes.

4. Scroll right, then double-click the **Sustainalytics ESG Risk Score** column to sort in descending order.

The screenshot shows the Morningstar Direct interface for the 'Boston Trust Walden Small ...' portfolio. The table displays various holdings with columns for Name, Sustainalytics Subindustry, Sustainalytics ESG Risk Classification, Sustainalytics ESG Risk Score, ESG Risk Percentile - Universe, ESG Risk Rank - Universe, and ESG Score - Universe. The 'Sustainalytics ESG Risk Score' column is highlighted with a red box, and a red arrow points to it from a text box on the right that says 'Sort in descending order.'

	Name	Sustainalytics Subindustry	Sustainalytics ESG Risk Classification	Sustainalytics ESG Risk Score	ESG Risk Percentile - Universe	ESG Risk Rank - Universe	ESG Score - Universe
1	Valmont Industries Inc	Non-Residenti	Severe	50.10	96.51	13165/13646	
2	Chesapeake Utilities Corp	Gas Utilities	Severe	42.64	89.12	12146/13646	
3	Idacorp Inc	Electric Utilitie	Severe	40.63	85.75	11682/13646	
4	Globus Medical Inc Class A	Medical Devic	High	39.70	84.45	11503/13646	
5	Unitil Corp	Electric Utilitie	High	39.59	84.24	11474/13646	
6	Douglas Dynamics Inc	Heavy Machin	High	38.05	81.31	11070/13646	
7	New Jersey Resources Corp	Gas Utilities	High	37.84	80.88	11011/13646	
8	Lancaster Colony Corp	Packaged Foo	High	37.27	79.86	10870/13646	
9	Sensient Technologies Corp	Specialty Che	High	36.53	78.18	10638/13646	
10	Ensign Group Inc	Medical Faciliti	High	35.87	76.05	10345/13646	
11	Corcept Therapeutics Inc	Pharmaceutic	High	35.67	75.59	10281/13646	
12	Minerals Technologies Inc	Specialty Che	High	35.62	75.48	10266/13646	
13	ONE Gas Inc	Gas Utilities	High	35.52	75.18	10225/13646	
14	Power Integrations Inc	Semiconducto	High	35.50	75.15	10221/13646	
15	Cantel Medical Corp	Medical Devic	High	35.12	74.24	10096/13646	
16	Donaldson Co Inc	Industrial Mac	High	33.95	70.86	9629/13646	
17	Lakeland Financial Corp	Regional Bank	High	33.86	70.62	9596/13646	
18	1st Source Corp	Regional Bank	High	33.44	69.16	9395/13646	
19	Cactus Inc Class A	Oil & Gas Equi	High	32.89	67.39	9152/13646	
20	Selective Insurance Group Inc	Property and	High	32.81	67.11	9113/13646	
21	Washington Trust Bancorp Inc	Regional Bank	High	32.60	66.36	9010/13646	
22	Tompkins Financial Corp	Regional Bank	High	32.21	65.14	8841/13646	
23	The Middleby Corp	Industrial Mac	High	32.18	65.04	8827/13646	

5. Answer the following questions:  
 Which holding has the highest ESG Risk Score?  
 For the holding listed above, what is the ESG Risk Classification?

6. Click **X** to close the Detailed Holdings Analysis window.



7. **Right-click Boston Trust Walden Small Cap.** The right-click menu opens.
8. From the right-click menu, select **Morningstar Report/Quicktake.** The Morningstar Report opens in a browser window.

Note: The Morningstar Report for mutual funds, exchange traded funds (ETFs), and stocks provides a streamlined experience to view fund and holding level information for a security.

<a href="#">Quote</a> <a href="#">Analysis</a> <a href="#">Performance</a> <a href="#">Risk</a> <a href="#">Price</a> <a href="#">Portfolio</a> <a href="#">People</a> <a href="#">Strategy</a> <a href="#">Parent</a>			
<b>Boston Trust Walden Small Cap Fund</b> BOSOX ★★★★★ <b>Bronze</b>			
<b>NAV / 1-Day Return</b> 17.44 / 0.35%	<b>Total Assets</b> 731.6 Mil	<b>Adj. Expense Ratio</b> ⓘ 1.000%	<b>Expense Ratio</b> 1.000%
<b>Category</b> US Fund Small Blend	<b>Investment Style</b> Small Blend	<b>Minimum Initial Investment</b> 100,000	<b>Status</b> Open
USD   NAV as of Apr 12, 2021   1-Day Return as of Apr 12, 2021, 5:13 PM CDT   Quantitative Rating as of Feb 28, 2021, 6:00 AM			
<b>Morningstar's Analysis</b> ⓘ <span>Quantitative Take</span> <span>Ratings</span>			
<b>Process</b> ⓘ Feb 28, 2021 <b>High</b>	<b>People</b> ⓘ Feb 28, 2021 <b>Below Average</b>	<b>Parent</b> ⓘ Feb 28, 2021 <b>Average</b>	
	<b>Summary</b> ⓘ Mar 22, 2021 Decreased confidence in Boston Trust Walden Small Cap's management team is the share class' rating downgrade to a Morningstar Quantitative Rating of Bronze from charges fees in line with its similarly distributed peers, priced within the middle qu		

## Creating a Presentation Studio Report

We have now identified the 5-globe rated funds. The next step is to create a report using Presentation Studio.

The following exercise is covered in this section:

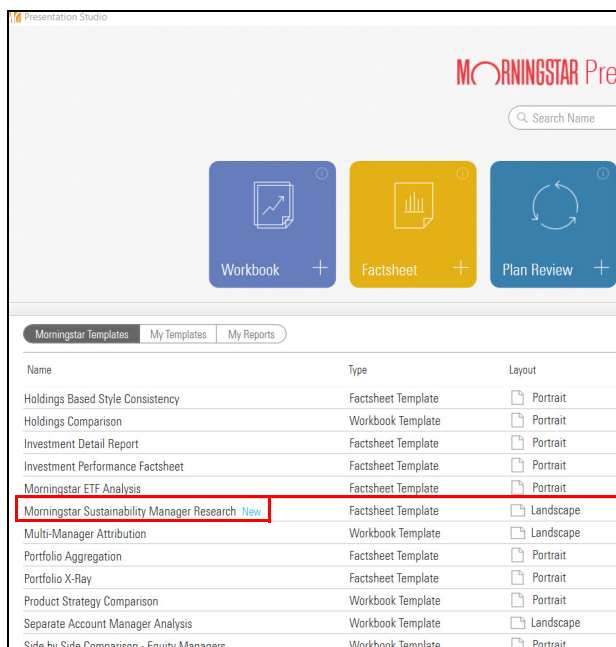
- ▶ [Create a Presentation Studio report on page 26](#)

### Overview

Presentation Studio allows users to create reports for funds using pre-built templates or by creating a new workbook or factsheet. To create a Presentation Studio report, do the following:

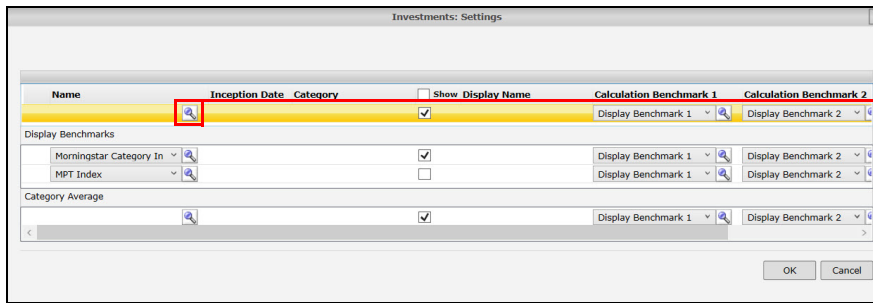
1. Click the **Presentation Studio** module. Presentation Studio opens in a separate window.
2. Click **Morningstar Templates**.
3. Expand the **Factsheets** section.
4. **Scroll down** and **double-click** the **Morningstar Sustainability Manager Research** template. The Investments: Settings window opens.

### Exercise 12: Create a Presentation Studio report

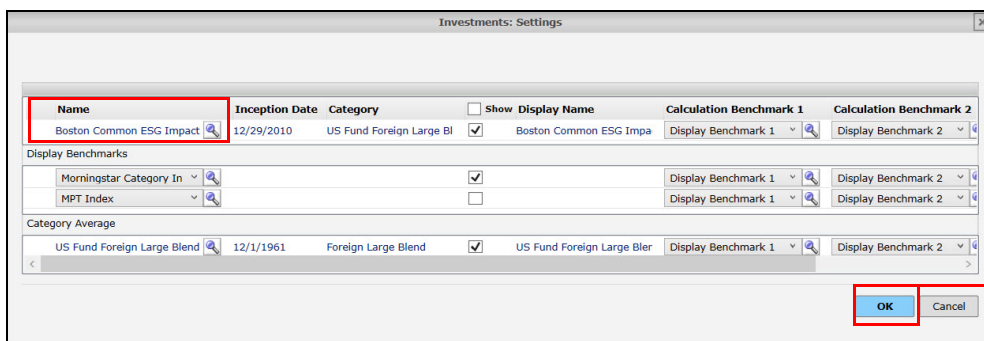


Select this template.

- Click the **magnifying glass** next to **Name**. The Find Investment window opens.



- In the search field, enter **Boston Common ESG Impact Intl**, then click **Go**. A search result appears in the Available Records area.
- Click the **fund name**, then click **OK** to close the Find Investment window.
- From the Investments: Settings window, click **OK**. The factsheet opens in a new window.



- Click the section in the header containing the text **Morningstar Sustainability Manager Research** and change it to the desired **firm name**.

—

BCAIX

No Analyst Rating

As of 3/31/2021

**Snapshot**

Firm Name	Boston Common
Strategy Name	Boston Common Intl Eq SRI
Morningstar Category	US Fund Foreign Large Blend
Manager Name	Multiple
Annual Report Net Expense Ratio	1.00
Turnover Ratio %	33.00
Domicile	United States
Base Currency	US Dollar
Inception Date	12/29/2010
Portfolio Date	12/31/2020
Morningstar Analyst Rating	—
Analyst Name	—
Global Fund Report Analysis Date	—

**Over/Under Benchmark Performance**

Time Period: 4/1/2016 to 3/31/2021 | Rolling Window: 3 Years 1 Month shift | Calculation Benchmark: MSCI ACWI Ex USA NR USD

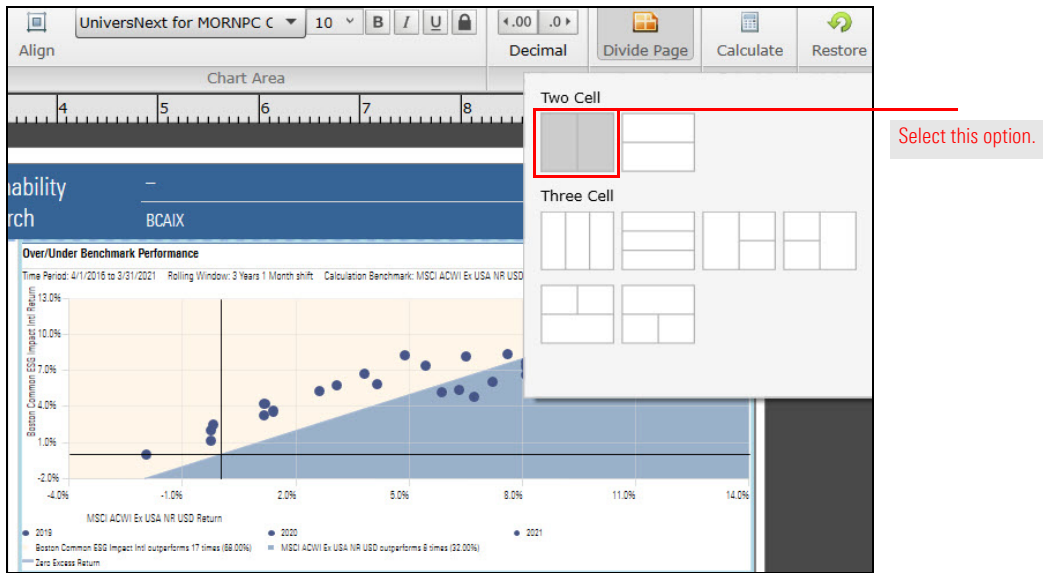
Legend: ● 2019 Boston Common ESG Impact Intl outperforms 17 times (88.00%) | ● 2020 MSCI ACWI Ex USA NR USD outperforms 8 times (32.00%) | ● 2021

— Zero Excess Return

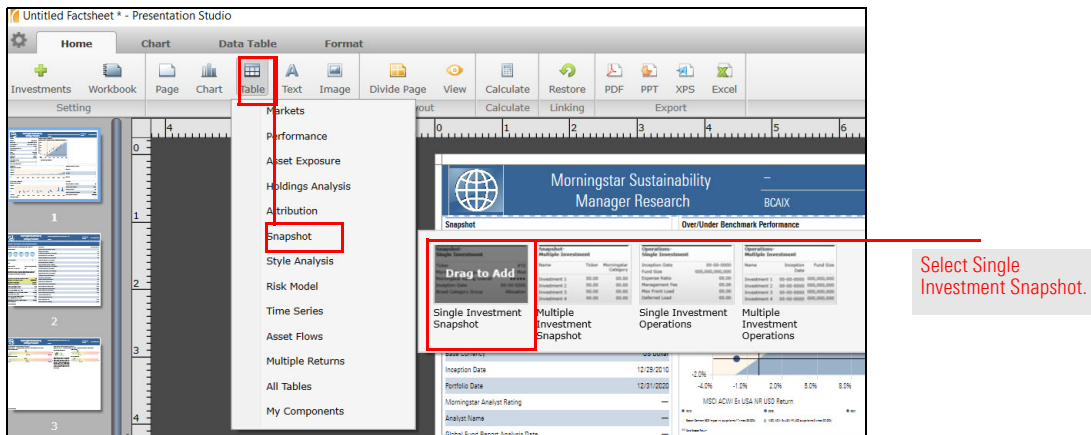
Change the text in this section to the firm name.

- Click the **Over/Under Benchmark Performance** component.
- From the toolbar, click the **Divide Page** icon. Layout options appear.

12. Under Two Cell, select the **first** option. The component is updated.



13. From the toolbar, click **Home > Table > Snapshot**. Four component options are displayed.



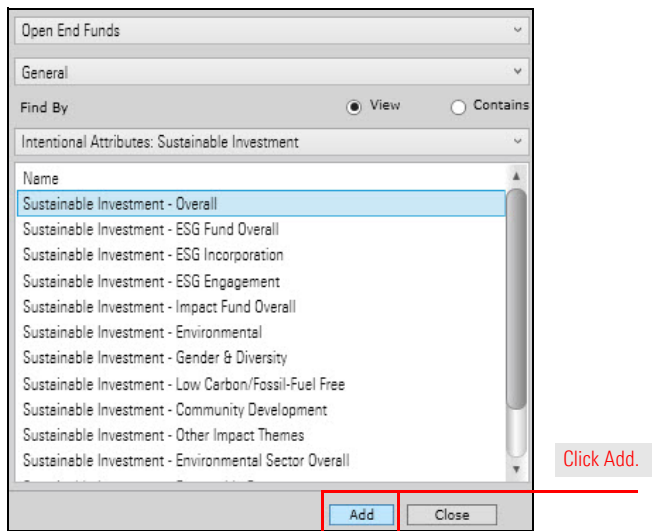
14. **Drag-and-drop** the **Single Investment Snapshot** component to the right of the Over/Under Benchmark Performance chart.

15. From the **Single Investment Snapshot** table, click the **Ticker** drop-down.

16. From the **Find By** drop-down, select **Intentional Attributes: Sustainable Investment**.

17. Select **Sustainable Investment - Overall**.

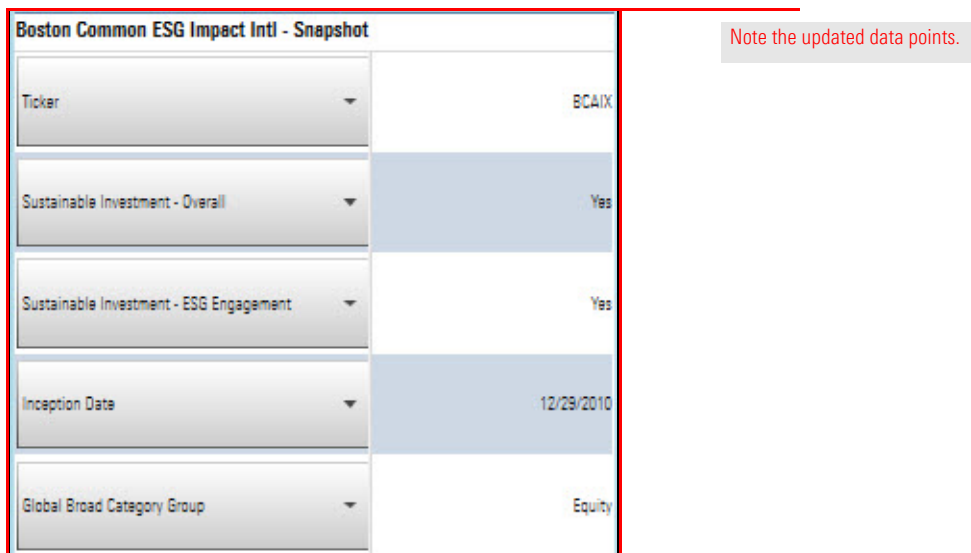
18. Click **Add**. The table updates.



19. Repeat steps 13-14 for the **Morningstar Category** drop-down.

20. Select **Sustainable Investment - ESG Engagement**.

21. Click **Add**. The table updates.



22. Right-click **Inception Date**, then select **Delete Row**.

23. Right-click **Global Broad Category Group**, then select **Delete Row**.

24. From the upper-left corner of the Factsheet window, click the **component settings** icon, then select **Save As Template**. A dialog box opens.

25. Name the template **Boston ESG Fund**, then click **Save**.

Users can now access this template to create reports for the other 5-globe rated funds.