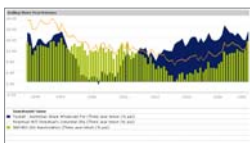
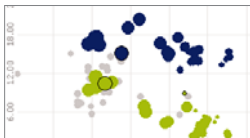


Investment Consulting



Use quarterly asset allocation updates to complement best practice portfolio reviews.



Access sophisticated returns and holdings-based analysis to drive investment decisions. Use our reports to reinforce your recommendations.

Build the best investment solutions for your business, with investment consulting services from the independent, international source.

You probably know we've been undertaking independent, unbiased qualitative and quantitative research on fund managers and their funds for years. You may also know that we're the leading provider of fund data in Australia.

And you're probably aware that we're part of a worldwide network of companies, bringing our global-standard tools and methodologies to the Australian market.

But now your business can benefit directly and intimately from all this - with Morningstar's investment consulting services. Our consulting team's extensive industry expertise and experience are focused directly on building and implementing investment solutions designed and tailored to meet your specific needs.

Portfolio Evaluation

How robust are your recommended lists or model portfolios? We can evaluate and provide you with comprehensive recommendations to make the most of your fund line-up. Or we'll help you locate, combine, and monitor the funds that conform to your specific requirements.

Asset Allocation Design & Implementation

In conjunction with our panel of industry asset allocation experts, our consultants can help you set investment policies, create asset allocations, build and implement investment strategies, and monitor ongoing performance. And your clients will get accessible information to help them understand how the solutions you're providing are helping them achieve their goals.

What Your Business Will Gain From Our Investment Consulting Services

- ▶ Objective fund manager assessment and comparison.
- ▶ In-depth, best practice fund selection and combination.
- ▶ Expert evaluation and enhancement of existing portfolios.
- ▶ Tailored portfolio design, creation, and implementation.
- ▶ Effective monitoring to keep portfolios on track to meet specific goals.
- ▶ Assessments of latest product offerings, and the benefits they offer.
- ▶ Maximised efficiency of your portfolio management time and resources.

Where to from here

To find out more about the benefits to your business of our investment consulting services, just phone or email our Sales team on +61 2 8274 0325 / sales.au@morningstar.com

