



Fincor Leverages Global Reach, Powerful Capabilities and Flexibility of Morningstar Direct™

“Morningstar Direct™ provided a quick and easy way to present complex information in a way that clients could easily understand.” —*Christian Chiera, Partner, Asset Management, Fincor Finance CA*

The Right Tools for Portfolio Management

Fincor Finance is a small, independent Swiss financial boutique. The diverse skill set and knowledge among our partners sets us apart in the marketplace, as well as our client-centric approach, flexibility and focus on capital preservation. As a partner, I'm responsible for the asset management division, where we manage, on a discretionary basis, the assets of private client portfolios.

When I started with Fincor about five years ago, we needed some stronger

portfolio management tools. We conducted a thorough analysis of the products available in Switzerland and selected Morningstar Direct™.

Direct offered us some key advantages. It has a broad, global database. It gave us the ability to screen and monitor collective investments on an absolute and relative basis. It could effectively evaluate and monitor the risk aspect of fund strategies. And in terms of graphical output, Direct provided a quick and easy way to present complex information in a way that clients could easily understand.

The flexible interaction of Direct's various modules was something we appreciated, as we really wanted everything in one package. We also liked Morningstar's approach to knowledge transfer, from one-to-one meetings, to webinars, to articles—the kinds of continuous learning opportunities that a lot of their competitors didn't offer.

Powerful Modules in a Single Platform

There are several main ways that we use Morningstar Direct. In the research area, it helps us generate investment ideas. We regularly screen financial markets or their sub-segments to capture market developments, such as momentum, performance deviation, etc. Also very helpful for our research is the independent analysis we can access in Direct. When we're looking at a fund, we go straight to Direct to learn more about that fund's peer universe, what similar products are offered, and what Morningstar's qualitative research says.

We also use Direct for conducting in-depth analysis. We run calculations, we do simulations of strategies and model portfolios, and on a very granular level, we do product screening. We create and maintain our strategies, our model portfolios, our customized benchmarks and our client track record in Direct's Portfolio Management module. I particularly like the logical structure and flexible interaction between the various components of this module. I can easily analyze and compare the strategies applied to my model portfolios, then do the same for benchmarks.

The Performance Reporting tool in Morningstar Direct is very important to our work in risk management. It helps me track potential deviation and risks when I compare performances and results. It helps me screen the financial markets and determine which segments exhibit momentum. And we are able to create customized reports, and update them as frequently as our clients require.

We have also found the Fund Flows capability, which captures flow tendencies

in the various asset classes and investment products, to be a very valuable area that we look at regularly.

Last but not least, we use Presentation Studio to help us with client communication. We can generate market views and outlooks, and easily create presentations

and eliminates the often difficult interaction between various systems. It's easier to learn the logic of just one system, and have a powerful tool to use in a flexible manner.

The extensive global reach of Morningstar's database and the fact that

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for clients and prospects, for example on market performance. Or, we will do a portfolio analysis within Presentation Studio to assess return and risk.

I also create fact sheets and competitive analysis reports. I really value the flexibility as it allows me to easily customize what I want to show graphically.

Streamlined Work Processes and Reduced Redundancy

Morningstar Direct™ greatly simplifies our working processes, especially those that are recurring and time consuming—data searches, calculations, due diligence, and so on. The time we save is valuable because we can allocate it in a much more efficient way for our clients.

Having an all-in-one tool also reduces the redundancy of having to learn and deal with multiple software solutions,

all the data is consistently updated saves us a great deal of time as well. We create investment lists for various purposes, and we know the data in Direct will always be current, so there's no need to recreate or modify them.

Personalized and Responsive Service

Our view of Morningstar is that it is a company that strives for excellence by continuously improving its offered services for the benefit of its clients. We really appreciate that our suggestions and inputs are taken seriously, even though we are a very small firm.

Morningstar is very open for feedback and product enhancement suggestions. When I see or find something that could be enhanced or fixed, they are always willing to listen and have incorporated my suggestions. They offer me a level of service that is personal, professional and timely, and I'm very satisfied.

Learn More

<http://global.morningstar.com/MorningstarDirect>

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