

Morningstar Direct Learning Resources							
Level	Description	Topic	Live Online Session	View Video	Reference Materials	Latest Release Notes	Take Exam
0. Morningstar Direct Cloud							
001	Morningstar Direct Cloud	Morningstar Direct Cloud Home Page & Navigation, Lists & Screens, Grid & Column Sets, Research	Register Here	Click Here	Click Here	Click Here	Take Exam
I. Basic Navigation							
101	Morningstar Direct Fundamentals	User Preferences, Creating Lists & Searches, Data Sets & Calculations	Register Here	Click Here	Click Here	Click Here	Take Exam
II. Intermediate Navigation							
201	Monitor & Evaluate Investment Line-Ups	Basics to Performance Reporting	Register Here	Click Here	Click Here	Click Here	Take Exam
201	Create Custom Scores to Screen Investments	Basics to Scorecard	Register Here	Click Here	Click Here	Click Here	
201	Morningstar Direct Tools	Morningstar Direct Excel Add-In	Register Here	Click Here	Click Here	Click Here	
202	Create Compelling Custom Presentations	Basics to Presentation Studio	Register Here	Click Here	Click Here	Click Here	Take Exam
202	Get Insight on Investor Trends	Basics to Asset Flows		Click Here	Click Here	Click Here	
202	Morningstar Direct Tools	Note Manager		Click Here	Click Here	Click Here	
III. Advanced Navigation							
301	Create Custom Portfolios	Creating Model Portfolios		Click Here	Click Here	Click Here	Take Exam
301	Create Custom Portfolios	Importing Private Investments		Click Here	Click Here	Click Here	
301	Monitor Portfolios & Markets in Real-Time	Basics to Real-Time Portfolio Analysis	Register Here	Click Here	Click Here	Click Here	
301	Identify the Impact of Investment Decisions	Basics to Equity Attribution	Register Here	Click Here	Click Here	Click Here	
302	Morningstar Direct Tools	Custom Database			Click Here	Click Here	Take Exam
302	Identify the Impact of Strategic Asset Allocation Decisions	Basics to Total Portfolio Attribution		Click Here	Click Here	Click Here	
302	Determine Optimal Asset Allocation Strategies	Basics to Asset Allocation	Register Here	Click Here	Click Here	Click Here	