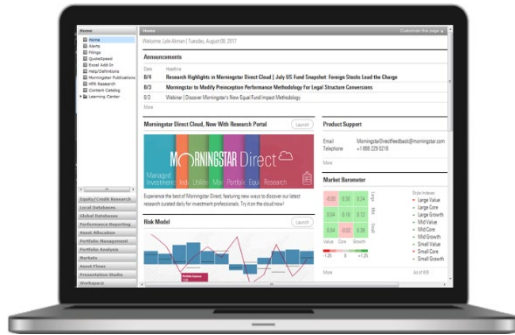


Morningstar Direct Quickstart For New Users



Welcome to Morningstar Direct!

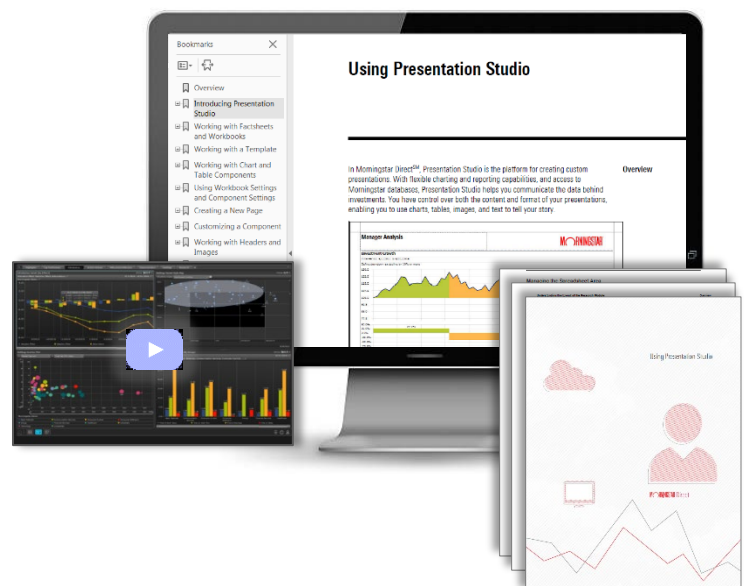
Our investment analysis platform is built specifically around the workflows of asset managers and financial advisors to help position and market products, construct portfolios, analyze investments, and connect with investors. Follow the steps below to help you get started.

Get Started!

- 1 Get an **overview of Morningstar Direct** [View Guide](#) [Watch Video](#)
- 2 Learn how to create an **Investment List** for competitive analysis, **Specific Screening** of investments and more [View Guide](#) [Watch Video](#)
- 3 Learn how to create custom **Data Sets & Calculations** [View Guide](#)
- 4 Learn how to find Morningstar's **Methodology & Data Definitions** in Morningstar [View Guide](#)
- 5 Take the **Basic Level Certification Exam** to test your knowledge [Take Exam](#)

Next Steps

Now that you have the basic knowledge of Morningstar Direct, be sure to check out other useful [resources](#) we have available for you!



Stay Connected!

[Join Morningstar Community](#)