



Stress Testing for PMs + Asset Gatherers.

Quantify downside risks. Be tactical on the upside.

→ www.hiddenlevers.com/morningstar

ANSWER THE BIG QUESTIONS

- How do my models react **to the Euro falling to \$1.00?**
- How do I speak to clients about **Global Deflation?**
- How do I hedge portfolios against **low oil prices?**



SPEAK TO CLIENTS + PROSPECTS ABOUT RISK IN REAL TERMS.

Comparative Performance in Bear Markets

Portfolio: John Vanderman Household	+ ✎ ✕
Totals:* 2,487,906.68	-19.31%
	-595,474.09
Portfolio: Strategic Model	+ ✎ ✕
Totals:* 2,635,193.66	-14.49%
	-446,370.63

Stress Testing

Measure impact of up-to-date macro scenarios for portfolios and model. Adjust assumptions on the fly.

Risk Profiles

Get instant portfolio forensics, including economic indicators with high beta, asset allocation, risk measures, and cross + index correlations.

Risk Monitor

Auto-run stress testing nightly on a whole book of business to identify problematic portfolios, based on loss-tolerance or benchmark deviation.

Portfolio Management

Construct portfolios optimized for macro risk, or discover securities that have significant correlation (direct/inverse) to an economic indicator.

Lead Generation

Offer interactive stress testing on your website. Use widgets as an instant digital marketing strategy.

Tech Bubble 2.0: Dot-Com Deja Vu ?

The following macro indicators would be most impacted by this scenario.

Scenario Modeling	Current Projected		Scenario Impact		
Airline Traffic Growth	1.20%	-8.70%			-9.9 pts
Nasdaq	4,757.88	3407.88			-28%
PC Sales	-10.90%	-15.30%			-4.4 pts
S&P 500	2,051.82	1671.82			-19%
Euro	\$1.12	\$0.93			-17%

MORNINGSTAR®

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Increase AUM



Showcase Hedging Strategies

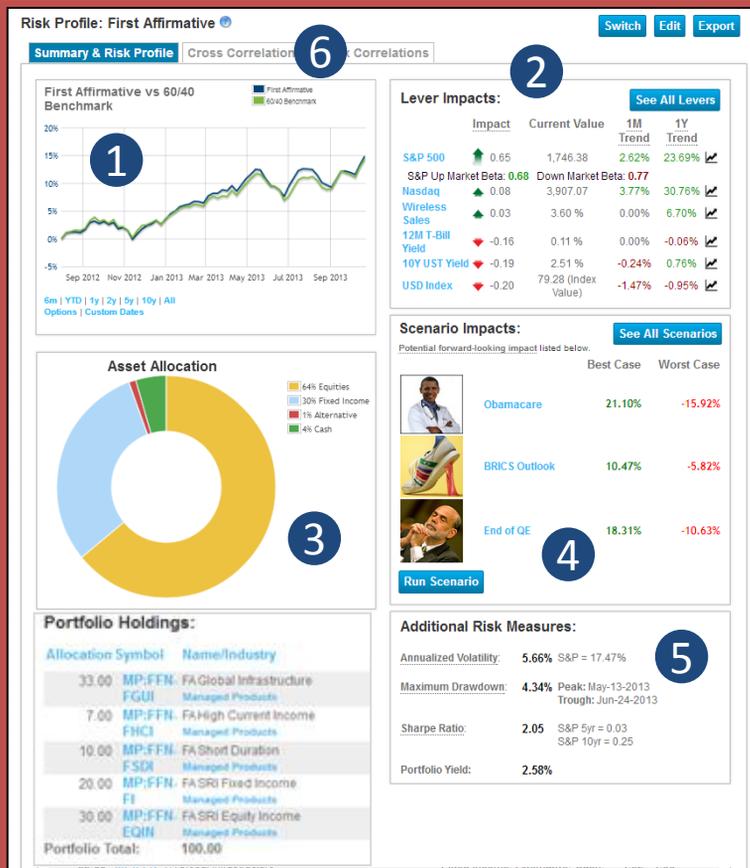


Maintain Client Expectations

Instant Portfolio Forensics

Use the risk profile to quickly get analytics on client + prospects portfolios:

1. Customized benchmark comparison
2. Portfolio beta to S&P and other impactful economic levers
3. Asset allocation with industry breakdown
4. Best + worst case forward-looking impacts of economic scenarios
5. Portfolio volatility + max draw down
6. Cross correlations between holdings



Pricing

FEATURES	BASIC	PRO	ELITE
Scenario Modeling	+	+	+
Risk Profiles	+	+	+
Reports	+	+	+
Custom Branding		+	+
Hedging Wizard for Rebalancing		+	+
Correlations Screener		+	+
Options + Alternatives Support			+
Embedded Stress Testing App			+
Risk Monitoring			+
Monthly Pricing (USD)	\$300	\$600	\$1200
Discounted Annual Pricing (USD)	\$3000	\$6000	\$12000
Morningstar Data Import	FREE	FREE	FREE

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