

Morningstar Advisor Forum, Navi-Mumbai – 23rd August 2017 @ Four Points By Sheraton, Vashi

Agenda	
1:30-2:00 PM	Registration and Refreshments
2:00-2:15 PM	About Morningstar
2:15-3:00 PM	Demonstrating the value of advice When a client's portfolio is doing well, the market is given credit for it. When the portfolio is down, clients tend to pin the blame on their adviser. Demonstrating the value of advice is truly a challenge for most advisers. Morningstar® Adviser Workstation™ supports advisers with the latest investment data, tools, and reports to serve existing clients and generate new business. This presentation illustrates how you can use AWS to demonstrate the value of your advice to clients.
3:00-3:15 PM	AWS Overview
3:15-3:30 PM	Break
3:30-4:00 PM	Selecting the right funds for investors: A Morningstar Perspective Given the plethora of options out there, it's difficult for an adviser to pick the right set funds for a particular client's portfolio. We illustrate Morningstar's Fund Analysis & Ratings and how it can go a long way in helping an adviser pick the most suitable funds from the wide universe available.
4:00-4:30 PM	Strategic Investment Choices for Every Life Stage Clients tend to hold multiple assets, but rarely, if at all, are they held in an optimal fashion in a single portfolio. To help advisers provide the best solutions to clients, Morningstar Investment Adviser India offers a range of model portfolios which are built for the long term, with a keen eye on risk and asset allocation, and created to help meet your clients' need at each stage of their life. The construction process is based on more than 30 years of ground-breaking research on long-term strategic asset allocation, we examine the challenges of meeting client risk and return objectives and tell you why portfolios are designed to be the foundation of your clients' investing experience.
4:30 PM onwards	Networking Hi - tea
* Agenda is subject to change	