

This month's tip comes from client education manager, **Chad Lowry**.



Use our risk model data to understand or predict performance.

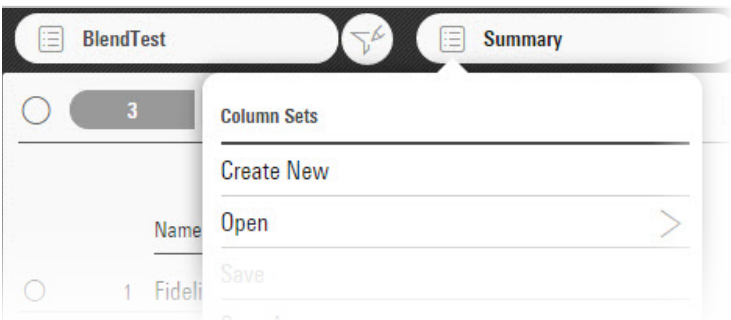
The Morningstar Global Risk Model, generated from the models developed by our quantitative research analysts, helps you assess the risk in your investments and how it could affect performance. The 36 risk factors in our model allow you to determine a mutual fund's exposure to style, region, sector, or currencies.

You can use this data to analyze your funds or portfolios for these risk factors, identify whether there's a positive or negative premium, and compare the results to peers. It's now available in Morningstar DirectSM Cloud.

Where can I find this risk factor data for portfolios?

Log in to <http://direct.morningstar.com>

In the Investment Analysis app, go to the toolbar and select the **Column Sets** menu, and then **Open**. You will see the Morningstar defaults along with the sets you've created and saved.



Select **Portfolio Risk Factor Exposures**.



You will then see the risk factors for each of the funds or portfolios in your list. Scroll to the right to view all the risk factors in the grid view.

Risk Factors - Portfolio: Valuation (mo-end)	Risk Factors - Portfolio: Economic Moat (mo-end)	Risk Factors - Portfolio: Val Uncertainty (mo-end)	Risk Factors - Portfolio: Fin Health (mo-end)	Risk Factors - Portfolio: Ownership Risk (mo-end)
0.23	1.09	-0.87	0.69	
0.31	0.55	-0.56	0.63	
0.06	0.84	-0.89	0.50	