

Morningstar.co.uk™ Content Packages for Financial Institutions

Content Packages

- ▶ Education
- ▶ Equities Investor
- ▶ Fund Investor
- ▶ Markets and Economy
- ▶ Investing for Retirement

Investors turn to Morningstar.co.uk for our independent voice, investment ideas, and focus on education. Articles and videos originate from our dedicated team of global analysts and editors, providing carefully crafted original content and commentary from industry leaders. Morningstar delivers all of this with an objective in mind: to help investors meet their financial goals.

Enhance Your Offering With Morningstar Content

Financial institutions can obtain our content to bring Morningstar's valuable insights to their clients. We work with institutions to offer flexible display formats, equipping them with the articles, videos and commentary that investors want. Morningstar.co.uk is a go-to investment website for 290,000 registered users, logging approximately 3 million page views per month.

Investor Insights for Your Goals

Whatever the goal, Morningstar.co.uk is a reliable source for in-depth commentary and original research.

We empower investors to make informed decisions, whether they are investing for the first time, looking for opportunities in the market, or saving for retirement. Financial institutions can acquire content packages that focus on education, equities, funds, markets and the economy, and investing for retirement curated by our accomplished analysts and editors.

Backed by an Accomplished Team

Supported by the expertise of 15 site editors and more than 200 analysts worldwide, the U.K.-based team produces approximately 25 articles and videos along with 20 new and updated fund research reports per week. Morningstar.co.uk offers a valuable outlook on the global and regional markets from a local perspective to educate, inform, and guide investors.

Get Started Today

Morningstar offers financial institutions the choice of five content packages. Please see the back page for more details.

Morningstar.co.uk

The screenshot displays the Morningstar.co.uk website interface. At the top, there's a navigation bar with 'Equity Research & Insights'. Below it, a featured article titled '3 Undervalued UK Stocks' is shown, along with a video player featuring Emma Wall. A central section titled 'Articles: All Morningstar Articles & Videos' contains a table of articles with columns for Title, Collection, Author, and Date. To the right, there's a 'Morningstar Insights' section with a grid of links to various content categories like 'All Morningstar Articles & Videos', 'Bond Investing', and 'Economic Insights'. Below the table, a 'Video Centre' section features a video player for 'Preparing for Rising Interest Rates' by Holly Cook. To the right of the video player, there's a sidebar with 'Latest' news items, including '3 Bond Investing Tips', 'Preparing for Rising Interest Rates', 'When To Choose Trackers and ETFs Over an Active Manager', and 'Mark Mobius: 3 Emerging Markets to Watch'. The bottom of the page includes a 'Related Links' section and a 'Cook' section with a quote from Holly Cook.

	Content Examples		
<p>Contact Us If you would like to learn more or purchase one of our content packages, call us on +44 (0)20 3107 0000 or email us at UKsales@morningstar.com.</p> <p>🕒 Frequency 🎯 Goals 👤 Audience</p>	<p>Education</p>	<ul style="list-style-type: none"> 🕒 At least two new articles or videos each week 🎯 Preparing individuals to make investing decisions 👤 Beginner investors and active investors 	<ul style="list-style-type: none"> ▶ An introduction to pension funds ▶ What is an ETF?
	<p>Stock Investor</p>	<ul style="list-style-type: none"> 🕒 At least four articles or videos each week 🎯 Providing useable investing ideas and informing readers about the market outlook 👤 Active investors of stocks and shares 	<ul style="list-style-type: none"> ▶ Top managers' favourite U.K. income stocks ▶ 3 Mid-caps with high dividend growth potential
	<p>Fund Investor</p>	<ul style="list-style-type: none"> 🕒 At least four articles or videos each week 🎯 Equipping investors with trade-generating content 👤 Active investors of open-end, closed-end, and exchange-traded funds 	<ul style="list-style-type: none"> ▶ Five top-rated global equity income funds ▶ Feeling contrary? Take a bet on these losers
	<p>Markets and Economy</p>	<ul style="list-style-type: none"> 🕒 At least two articles or videos each week 🎯 Informing investors about the economic outlook, including stock market and bond market developments 👤 Active investors interested in commentary and insights about the investing environment 	<ul style="list-style-type: none"> ▶ What does U.S. growth mean for U.K. investors? ▶ Is the U.K. market undervalued?
	<p>Investing for Retirement</p>	<ul style="list-style-type: none"> 🕒 At least two new articles or videos each week 🎯 Guiding investors in managing a portfolio that will fund their ultimate long-term goals, and informing on best practice in the lead up to, transition into, and during retirement. 👤 Both beginner and active investors taking responsibility for funding their desired in-retirement lifestyle 	<ul style="list-style-type: none"> ▶ How to build an income portfolio ▶ How much to save for a retirement salary of £50,000?
<p>Who Consumes Morningstar.co.uk Content?</p>		<ul style="list-style-type: none"> ▶ Novice investors: Education, getting started ▶ Active investors: Asset allocation, long-term horizon ▶ Retirees: Capital preservation, income focus 	