

# Morningstar Dataset

## Overview

In the global landscape, the lines between institutional and retail investing are often blurred. For allocators such as consultants, family offices, superannuations and others, having access to one of the largest dataset available – spanning all asset classes and regions – is key to finding managers and strategies that meet specific criteria for selection as well as for ongoing monitoring. For asset managers who compete globally, you need a lens into what consultants and investors see across the worldwide institutional investment industry which also requires access to the broadest and deepest set of information available.

eVestment has entered into an agreement with Morningstar, Inc. to provide open-end mutual fund data, exchange-traded fund data, money market fund data and hedge fund data to the institutional investment community. This expanded data coverage will provide a way to model together all of the different vehicle options available using one platform – eVestment Analytics.

## Data Universe and Regional Coverage

Morningstar data is available globally or by region including North America, Latin America, the Caribbean, Europe, Africa, the Middle East, Asia-Pacific and Offshore. With over 200,000 products available, you can be confident your analysis includes the full spectrum of data.

Dataset	Global Fund Count
Open-End Mutual Funds	155,000+
Money Market Funds	3,500+
Exchange Traded Funds	5,000+
Closed End Funds	600+

## eVestment + Morningstar = Expanded Coverage



### About Morningstar Data

Founded with the mission to create great products that help investors reach their financial goals, Morningstar provides data on approximately 446,000 investment offerings, including stocks, mutual funds and similar vehicles. Morningstar also provides real-time global market data on nearly 10 million equities, indexes, futures, options, commodities and precious metals, in addition to foreign exchange and Treasury markets.

### About eVestment

eVestment provides a flexible suite of easy-to-use, cloud-based solutions to help the institutional investing community identify and capitalize on global investment trends, better select and monitor investment managers and more successfully enable asset managers to market their funds worldwide. With the largest, most comprehensive global database of traditional and alternative strategies, delivered through leading-edge technology and backed by fantastic client service, eVestment helps its clients be more strategic, efficient and informed.

## BENEFITS TO YOU

### Depth of data coverage

Leverage an expanded dataset that works to complement your existing global coverage.

### Consistency across audiences

Institutions see what advisors and investors see.

### Model vehicles in one platform

Conduct all of your analysis with the same data across the same platform.

### Global research

Trust in a Morningstar staff of 500 data analysts across 27 offices globally, providing timely coverage and local expertise.

### Client support

Expert eVestment client service teams provide knowledgeable support around the clock.