

Morningstar Direct

What is Morningstar Direct?

It's a global investment analysis platform that unites all of Morningstar's data and institutional research, private and third-party content, rigorous analytics, and productivity tools. The software platform streamlines the process of finding meaning in financial information, then helps investment professionals communicate this information in customized reports and presentations with compelling data visualizations.

Professors can provide students access to this platform to prepare them for the realities they will encounter in the workforce as professional portfolio managers or financial researchers. Students who use Morningstar Direct gain experience with institutional data and various research methods. They can learn the product quickly by taking advantage of our product certification program. Educators can also reference Morningstar Direct's data and analytics while conducting their own academic research.

How do I access Morningstar Direct?

For students: Morningstar Direct is available in Suffolk University's Trading Room and Financial Center and the Sawyer Computing Center on the 5th Flr of the Sawyer Building. The software is installed on all computers and can be accessed via a username and password.

For faculty: Morningstar Direct is currently licensed for Finance Department faculty and is available on or off campus. Please contact us for further details.

I am new to Morningstar Direct. How do I learn more about it?

Morningstar Direct users have unlimited access to live online sessions, videos, user guides, regional training, and workflow documents, suitable for all skill levels. You can get access to all training resources by opening the Training folder under "Home" once you are signed in to the Morningstar Direct platform.

Their [Learning Opportunities](#) website also offers product documentation and video tutorials. Links to a few key resources are below.

- [Morningstar Direct Getting Started Video](#)
- [Morningstar Direct New User Guide](#)

You may also [contact our office](#) and we'll do our best to direct you to the appropriate resources.

How can I get help with Morningstar Direct?

- If you need a personal account or experience access problems, please [contact our office](#).
- Most questions can be answered by calling or emailing your local Morningstar Direct product consultants via the "Send us Feedback" button within the platform for questions about the platform's capabilities, its investment data, Morningstar methodologies or technical issues.
- Contact Morningstar Direct directly via phone: +1 866 229 0216 for technical assistance