

Morningstar Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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Abstracts

Morningstar Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Morningstar Inc. and its competitors. This provides our Clients with a clear understanding of Morningstar Inc. position in the [Media](#) Industry.

The report contains detailed information about Morningstar Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Morningstar Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Morningstar Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and company's long-

term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Morningstar Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Morningstar Inc. business.

About Morningstar Inc.

Morningstar Inc. is a provider of independent investment research to investors worldwide. The company offers a line of data, software, and research products for individual investors, financial advisors, and institutional clients through its Investment Information segment.

The company also provides asset management services for advisors, institutions, and retirement plan participants through its Investment Management segment. In addition to its U.S.-based products and services, the company offers local versions of its products designed for investors in Asia, Australia, Canada, Europe, Japan, and South Africa. Morningstar serves approximately 7.4 million individual investors, 245,000 financial advisors, and 4,200 institutional clients. The company has operations in 20 countries and holds minority ownership positions in companies located in two other countries.

The company maintains a series of comprehensive databases on many types of investments, focusing on investment vehicles that are used by investors. After building these databases, the company adds value and insight to the data by applying its core skills of research, technology, and design. As of December 31, 2009, the company provided data on approximately: 21,000 mutual fund share classes in the United States; 97,000 mutual funds and similar vehicles in international markets; 3,400 exchange-

traded funds (ETFs); 1,800 closed-end funds; 28,000 stocks; 8,200 hedge funds; 7,200 separate accounts and collective investment trusts; 109,000 variable annuity/life subaccounts and policies; 46,000 insurance, pension, and life funds; 12,300 unit investment trusts; 85 state-sponsored college savings plans (commonly known as Section 529 College Savings Plans); 83 years of capital markets data capturing performance of major asset classes; cash flow, ownership, and biographical data on directors and officers; real-time market data on approximately 4 million exchange-traded equities, derivatives, commodities, futures, foreign exchanges, precious metals, news, company fundamentals, and analytics; and real-time price quotes for global foreign currencies.

Segments

The company operates its business in two segments: Investment Information, which includes all of its data, software, and research products and services. These products are typically sold through subscriptions or license agreements; and Investment Management, which includes all of its asset management operations, which operate as registered investment advisors.

Investment Information

The products in this segment are Morningstar Licensed Data, a set of investment data spanning all of its investment databases, including real-time pricing data, and available through electronic data feeds; Morningstar Advisor Workstation, a Web-based investment planning system for independent financial advisors, as well as advisors affiliated with larger firms; Morningstar.com, which includes both Premium Memberships and Internet advertising sales; Morningstar Direct, a Web-based institutional research platform; and Morningstar Principia, its CD-ROM-based investment research and planning software for advisors.

The Investment Information segment also includes Morningstar Equity Research, which the company distributes through several channels. Investors can access its equity research through the Premium Membership service on Morningstar.com. In addition, the company distributes its research to several other companies that provide its analyst research to their affiliated financial advisors or to individual investors.

The company also offers various financial communications materials, real-time data, other investment software, and investment indexes, as well as several print and online publications focusing on stocks, mutual funds, personal finance, and other investing

topics. In 2009, the company developed a beta version of Morningstar QuoteSpeed, a new Web-based solution that delivers real-time market data through a desktop application. In addition to real-time market information, QuoteSpeed provides users with access to Morningstar's fundamental data, news, and analysis. QuoteSpeed would be available as a stand-alone applic

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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1 – Data availability depends on company's security policy.

2 – These sections are available only when you purchase a report with appropriate additional types of analyses.
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ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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