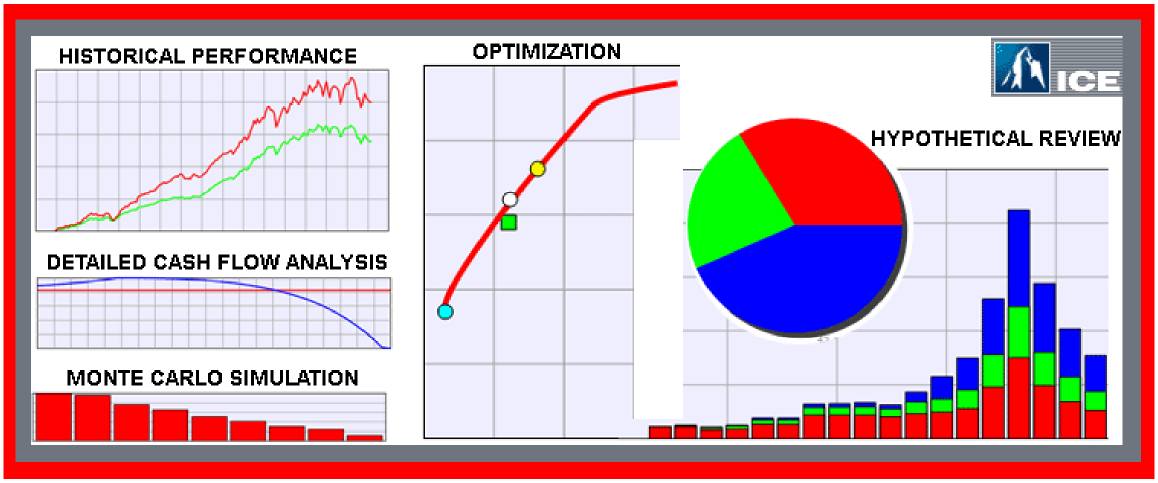
# Move Over Morningstar

## AdvisoryWorld completes new security analysis module




**AdvisoryWorld has now completed their new security analysis module that completely replaces harder to use and less efficient tools such as Morningstar.**

**This new module includes:**

✓ **Security Hypotheticals**
Run security and portfolio hypotheticals with or without reinvesting dividends, interest and capital gains.

✓ **Security Snapshots**
Review detailed security information and performance statistics in the Security Overview Reports.

✓ **Factor Analysis**
This exciting new tool helps advisors find all of the securities that match the characteristics of the portfolio benchmarks. The Security Analysis application allows users to find those funds and/or securities that will match the benchmark characteristics established for the portfolio. Failure to do this will mean that the asset allocation process will not be effective.

✓ ***Performance Overview***
Calculates and displays performance characteristics for mutual funds, stocks, variable annuities compared to an Independent Variable (i.e. index, security or portfolio). Calculated values include betas, alphas, correlation coefficients, RORs, STDs, Sharpe Ratio, R-squares, last 12 month ROR and risk-adjusted return.

✓ ***Scatter Graph***
Displays the performance of securities in risk/return terms (X and Y axis). Users can change X and Y values and sort columns.

✓ **Dollar Growth**
Graphs the performance of securities or indices for a specified time horizon.

- ***Monthly/Annual Performance***
Displays the monthly and annual rate of returns for any security or index.

- ***Rolling Period Performance***
Displays graphically the rolling period performance of securities or indices for any holding period and time horizon.

- **Security Screening**

Users can screen mutual funds, stocks and variable annuities by any set of selected criteria and then apply factor analysis to those securities meeting the criteria.

**Search on over 200 fields of information using these basic categories:**

-Fund Information
-Objective
-Expenses
-Investment
-Special Features
-Financial Highlights
-Risk Factors
-Performance

## Model Portfolio Links *(NEW)*

Advisors can link client portfolios to "model" portfolios such as AW Portfolios, Firm Portfolios or My Portfolios. It automatically starts the client out with a model portfolio and allocates capital proportionately. If the model is changed, all linked client portfolios are changed as well, and the advisor is notified of the change. This new feature allows advisors to link all clients with the same “model” portfolio as well as any modifications to that “model”. This will save a tremendous amount of time by eliminating the need to review and change all client portfolios.

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