



Client Success Story **Freedom Investment Management**

Morningstar Direct Facilitates Investment Analyst's Operations

“What I’ve always found great about Morningstar is the ability to pull mass amounts of data... and the ability to customize your reports for large quantities of data.”

Rob Gee

Head of Investment Research

Company

Freedom Investment Management

Product used

Morningstar Direct

Use cases

Due Diligence
Portfolio Analysis
Portfolio Management

Industry

Financial Services

The Freedom Investment Management Advantage

Rob Gee is the head of investment research at Freedom Investment Management, which includes two platforms that allow advisors to create their own advisor-directed model or choose from Freedom Investment Management—researched and—allocated models. Freedom Financial Advisors has “a differentiator so we can do outsourced CIO and let advisors focus on their side of the business, or advisors can create their own models within the company’s platform,” he said. This flexibility and dual capability make Freedom Investment Management a compelling advisor solution.

Morningstar Direct is a vital component to this advantage. In his current role, Gee manages global multi-asset class portfolios focusing on equity. His talents and responsibilities stretch wide, from asset allocation models to manager research and due diligence. To support him in his increased responsibilities, he uses Direct.

“I’ve had to dig into due diligence and do a lot of the analysis myself, preparing questions about the portfolios going into [money manager] meetings...I upload a lot of manager returns, all their data into Morningstar, and then I’ll run attribution on that. So mainly what I’ll do is go through and look at risk statistics and compare them to a benchmark, then I’ll pull those out and do a broad analysis on the managers within asset classes,” he said.

When Gee began using the platform 10 years ago, he took advantage of the Virtual Learning Center to get him up to speed with Morningstar Direct’s capabilities and how the platform could support his responsibilities. Today, Morningstar plays an integral role in optimizing Gee’s daily workflow. He frequently uses Morningstar Direct to tap into batch reporting, performance reporting, portfolio allocation tools, and modern portfolio theory. To stay on top of his portfolios and prepare for money manager meetings, he employs portfolio analysis and portfolio management models to pull in manager data, aggregate it, and benchmark it.

Throughout Gee's experience with the product, he has grown very fond of the convenience of batch reporting. "I batch huge reports and let them run overnight," he said, "They'll email me in the morning and it's not something I have to sit there and wait for throughout the day."

For Gee, Morningstar Direct has proven to be a powerful tool that allows him to upload manager returns, run attribution and risk statistics, pull large amounts of data, and customize reporting to make informed decisions on managers, build strong portfolios, and tackle his money manager meetings confidently. "[Morningstar Direct] is the industry standard tool at every firm I've ever worked at," he said. "It has all the capabilities that you want. Anyone within portfolio management, asset allocation, or asset management would use Morningstar Direct."

Ready to see for yourself?

Learn more about Morningstar Direct.

Visit: morningstar.com/products/direct

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