

Morningstar launches Medalist Core Portfolios

Morningstar has launched a range of Medalist Core managed accounts that will give advisers access to highly rated managed funds and ETFs.

The new Medalist Core portfolios bring together Morningstar's global independent research capabilities with its asset allocation and portfolio construction expertise to deliver holistic investment solutions that are designed to help advisers achieve their clients' investment objectives.

"Having a well-established asset management capability, in addition to dedicated independent Manager & Equity research businesses, gives us a distinct advantage in offering multi-manager multi-asset portfolios," Morningstar Head of Institutional Portfolio Management & Solutions Jody Fitzgerald said.

"We have the specialist resources to ensure we bring a level of robustness to every aspect of the portfolio build and execution that is paramount in an increasingly complex market and regulatory environment that few groups can boast."

The Morningstar Medalist Core Managed Accounts:

- Are available across six different risk profiles, offering approachable options for a range of different client life stages;
- The asset allocation that underpins these risk profiles include conservative, moderate, balanced, growth, and high growth and are aligned to Morningstar's Strategic Asset Allocation;
- Are regularly reviewed and rebalanced across a carefully selected group of funds, made up of Gold-, Silver- and Bronze-rated managers, with the Morningstar Medalist Rating™ reflecting Morningstar's conviction of the quality of these managers and funds; and
- Use both active and passive strategies where appropriate. This approach ensures investors are only paying for active management where it is most likely to succeed which results in a very competitive offering.

"We are not just a research house building a managed account portfolio of our top recommendations," Jody added.

"We're also integrating our decades and wealth of portfolio management experience to build portfolios designed to better empower your clients' financial decisions and investment success."

The Medalist Core Portfolios have been added to the Macquarie Wrap and Praemium platforms and will go live on the HUB24 platform on the 21st March, with other platforms to follow.

Further information on the Morningstar Medalist Core Portfolios can be found [here](#).

We'd be happy to arrange an interview with Jody. To do so, email Christine St. Anne at christine.stanne@morningstar.com.

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Morningstar's Investment Management group, a leading provider of discretionary investment management and advisory services. Guided by seven investment principles, the group is committed to focusing on its mission to design portfolios that help investors reach their financial goals. The group's global investment management team works as one to apply a disciplined investment process to its strategies and portfolios, bringing together core capabilities in asset allocation, investment selection, and portfolio construction. This robust process integrates proprietary research and leading investment techniques. As of Dec. 31, 2022, Morningstar's Investment Management group was responsible for approximately US\$246 billion* in assets under advisement and management across North America, EMEA, and Asia-Pacific.

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