



## Sharesight to Deliver Powerful Portfolio Tracker to Morningstar Premium Subscribers

**SYDNEY, 19 February 2020** – Sharesight, an award-winning online stock portfolio tracker and reporting tool, is teaming up with Morningstar Australasia Pty Limited, a subsidiary of Morningstar, Inc. (Nasdaq: MORN), a leading provider of independent investment research, to offer Sharesight Investor Plan to Morningstar Premium subscribers.

Morningstar Premium subscribers in Australia and New Zealand will receive Sharesight Investor Plan at no additional cost, allowing them to track all of their holdings in one place.

“Over the last year, we’ve been building a new experience for our Morningstar Premium subscribers, and our integration with Sharesight is the next step in that progression,” said Mark Lamonica, Senior Product Manager, Individual Investor, Morningstar Australasia. “We’re excited to combine Morningstar’s data, analytics, and research with Sharesight’s powerful portfolio analysis tracker to offer investors a more holistic view of their portfolios.”

“Sharesight’s mission is to empower self-directed investors through technology. This integration uses the power of our APIs to complement the world-class research of Morningstar,” said Doug Morris, CEO of Sharesight.

With Sharesight, Morningstar Premium subscribers will be able to generate instant reports on their total annualised performance over any period, benchmark their portfolio, and visualise their diversification and asset allocation. In Australia and New Zealand, the portfolio tracker also calculates taxable income, capital gains tax, and tax loss selling opportunities, and portfolio access can be shared securely with accountants or financial advisors for improved efficiency.

Investors have to rely on figures from brokers or carefully managed spreadsheets to track their dividends, capital growth, and other investments. With Sharesight’s portfolio tracker platform, investors can track investments in shares, bonds, managed funds, LICs and ETFs, from over 30 exchanges worldwide. As of 18 February 2020, more than 100,000 investors use Sharesight to track their portfolios.

Morningstar Premium offers independent investment research, tools, and insights to help investors make informed investment decisions and reach their financial goals with confidence.

**About Sharesight**

Sharesight is an award-winning fintech company with offices in Wellington, New Zealand and Sydney, Australia. Its secure online portfolio tracker is used by over 100,000 DIY investors and finance professionals in over 90 countries. Sharesight syncs with brokers to track trades, dividends, and corporate actions automatically. It allows clients to run powerful performance and tax reports, and share secure portfolio access with others. For more information visit: [sharesight.com](https://sharesight.com).

**About Morningstar Australasia Pty Limited**

Morningstar Australasia is a subsidiary of Morningstar, Inc., a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of products and services for individual investors, financial advisors, asset managers, retirement plan providers and sponsors, and institutional investors in the private capital markets. Morningstar provides data and research insights on a wide range of investment offerings, including managed investment products, publicly listed companies, private capital markets, and real-time global market data. Morningstar also offers investment management services through its investment advisory subsidiaries, with about USD \$217 billion in assets under advisement and management as of 30 September 2019. The company has operations in 27 countries. For more information, visit [www.morningstar.com/company](https://www.morningstar.com/company). Follow Morningstar on Twitter [@MorningstarInc](https://twitter.com/MorningstarInc).

**Media enquiries**

Mary-Kate Marchesi,  
+61 419-535-555 or [marykate.marchesi@morningstar.com](mailto:marykate.marchesi@morningstar.com)  
Morningstar Australasia Pty Limited

Prashant Mohan  
[Prashant.mohan@sharesight.com](mailto:Prashant.mohan@sharesight.com)  
Sharesight