

PRESS RELEASE



3 September 2024

Morningstar Wealth partners with the lang cat on Analyser

Morningstar Wealth is the latest managed portfolio provider to partner with Analyser, the platform and MPS comparison software from the lang cat. This brings the total number of MPS providers available to research on Analyser to 52, along with 29 investment platforms.

Morningstar launched its MPS in March 2013. Combining its multi asset investment portfolios with a client-focused adviser service program, the portfolios are designed to keep clients engaged and aligned with the financial plans advisers have created for them.

Analyser's MPS comparison module was launched in June 2022 following its original launch focusing on the platform market in Spring 2020. With continuous developments, Analyser remains uniquely and fiercely independent, with no external investors, no sponsors and no ulterior motives.

Analyser's only purpose is to give users a way to conduct safe, robust, defensible due diligence in a system which is free from provider influence. Its commercial model stands alone – no provider is ever charged for listing their propositions, there are no sponsorships or 'enhanced' listings available, and no paid-for ratings or awards. Advisers can also be reassured that because it is their license fees that keep Analyser alive, they are not the product – firms can research in privacy and confidence, knowing that no provider will be notified of their activities and no BDM will call.

Terry Huddart, the lang cat's Digital Director said: "Morningstar Wealth is a welcome addition to Analyser and will give advisers an even more comprehensive view of the market. Our model and approach to supporting advisers is unique in this space. This is a system which makes it easier for them to deliver the best possible client outcome in terms of platform and MPS selection."

Morningstar Wealth's head of UK Wealth Distribution, Ben Lester says:

“At Morningstar Wealth, our investment managers draw on insights from a global team of experts to build robust portfolios that align with clients’ goals. We share these insights with our clients to help them navigate market fluctuations, preventing decisions that could have long-lasting consequences in achieving their goals.”

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Notes to editors:

The lang cat is Leith’s leading (probably) specialist financial services consultancy. The lang cat works with financial advisers and providers, helping them develop new propositions, turn marketing strategy into action and articulate their services in such a way that people without financial services degrees have a hope of understanding them. It aims to make the industry a little bit less corporate and stuffy and a little bit more human.

The lang cat market insight powers Analyser which has been designed to help advice professionals research and conduct due diligence on platforms and MPS providers and ranges. Analyser puts suitability front and centre and gives an audit trail of every decision taken, through a software system that’s fast, accurate and independent. Advice professionals can find further information and sign up to a free 14-day trial at <https://www.langcatanalyser.com/>

Notes to Editors:

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