

Enabling a Self-Service Public Cloud Culture at Morningstar



Margaret Valtierra (she/her)
Program Manager
Morningstar

@Margaretvaltie

@Margaretvaltie@awscommunity.social

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Morningstar

Morningstar Direct

The screenshot shows the Morningstar Direct interface. On the left, there's a sidebar with various research and reporting tools. The main area displays the 'Corporate Sustainability Rating' for Dodge & Cox Global Stock, which is 'Low' relative to Global Equity Large Cap. It has a 'Corporate Sustainability Score' of 24.14 and a 'Corporate Contribution' of 100%. Below this is a 'Timeline' section showing financial data from 2012 to 2019, including financing rounds, exit rounds, captured employee counts, and estimated employee growth. A 'Morningstar Sustainability Rating' chart indicates a low rating.

PitchBook

Morningstar Sustainability Screener
MORNINGSTAR

This screenshot shows the Morningstar Sustainability Screener interface. It lists 1290 funds based on Morningstar Sustainability Rating™. The table includes columns for Name, Ticker, Last Close Price, Morningstar Sustainability Rating™, Yield (%), Morningstar Rating™, Morningstar Category, and Low Carbon Designation™. The funds listed include various bond and equity categories across different markets.

Name	Ticker	Last Close Price	Morningstar Sustainability Rating™	Yield (%)	Morningstar Rating™	Morningstar Category	Low Carbon Designation™
1290 Diversified Bond A	TNUAX	8.95	★★★★	3.97	★★★★	Fixed Income Miscellaneous	-
1290 Diversified Bond I	TNUIX	8.98	★★★★	4.08	★★★★	Fixed Income Miscellaneous	-
1290 Diversified Bond R	TNURX	8.89	★★★★	3.86	★★★★	Fixed Income Miscellaneous	-
1290 Essex Small Cap Growth A	ESCFX	10.38	★★	-	-	US Equity Small Cap	-
1290 Essex Small Cap Growth I	ESCJX	10.40	★★	-	-	US Equity Small Cap	-
1290 Essex Small Cap Growth R	ESCKX	10.36	★★	-	-	US Equity Small Cap	-
1290 GAMCO Small/Mid Cap Value A	TNVAX	14.56	★★	0.00	★★★	US Equity Small Cap	-
1290 GAMCO Small/Mid Cap Value I	TNVIX	14.59	★★	0.21	★★★	US Equity Small Cap	-

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MORNINGSTAR | DBRS

PlanPlus Global

a Morningstar company

adviserlogic

a Morningstar company

SUSTAINALYTICS

præmium

Morningstar

Global Offices



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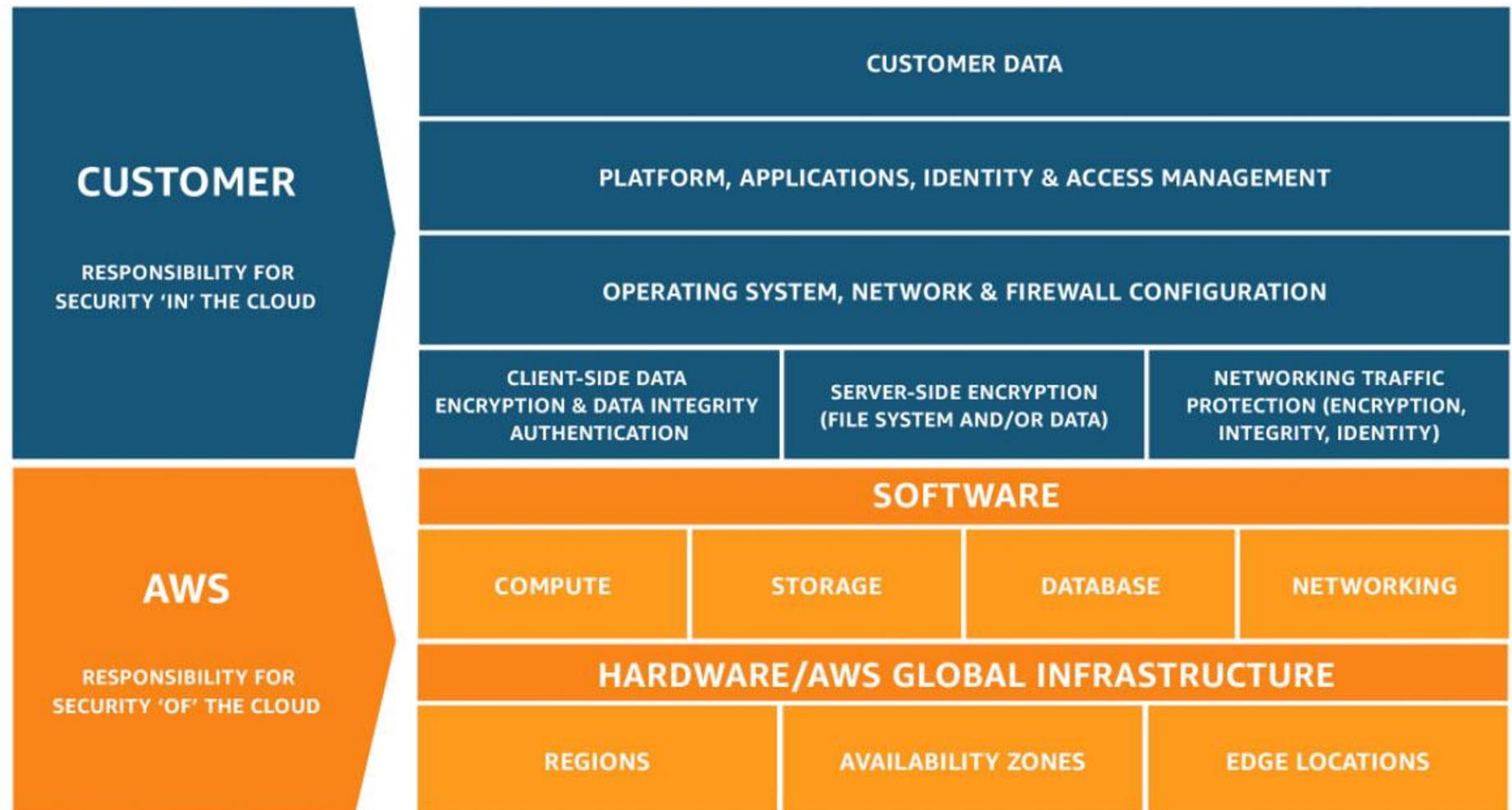


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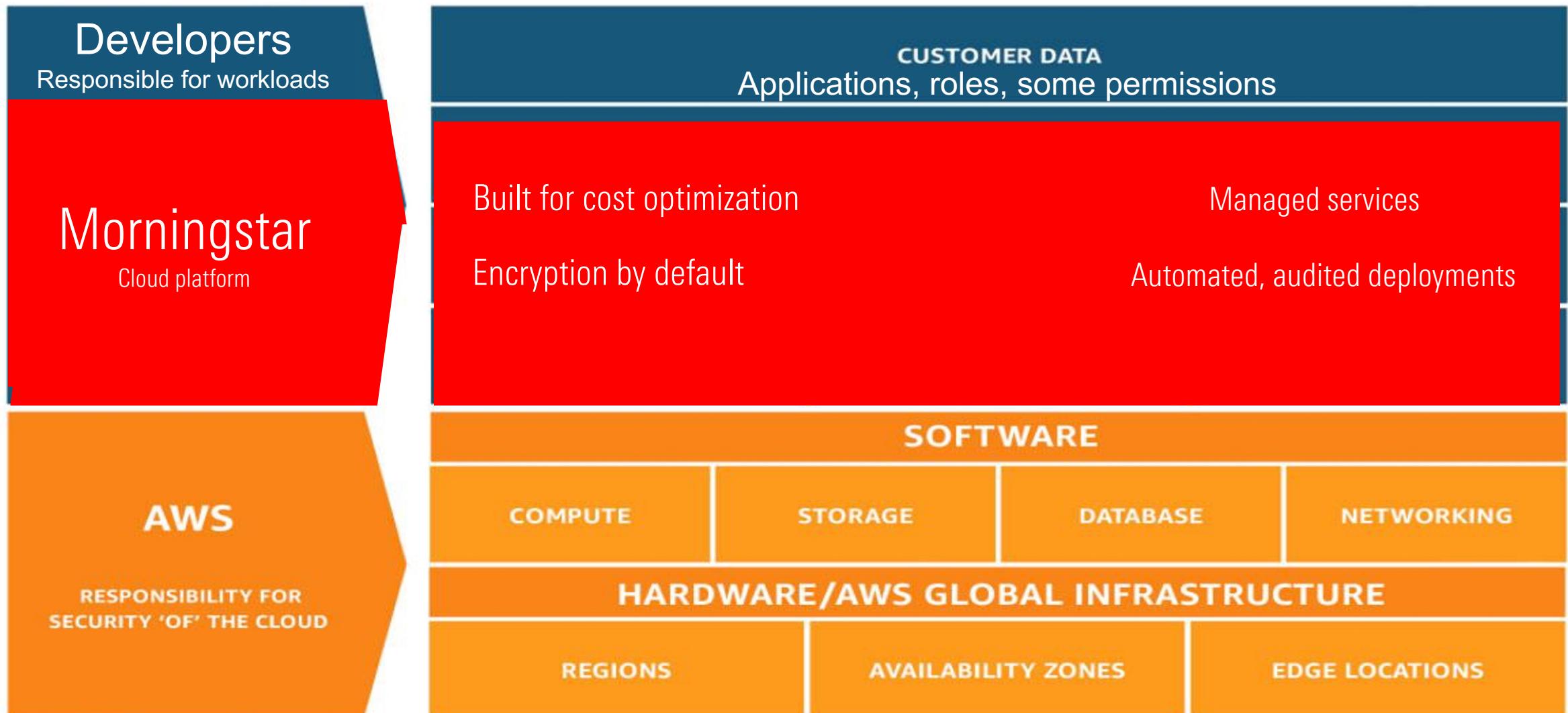


AWS Shared Responsibility Model



@Margaretbltie@awscommunity.social

Guardrails in cloud



Scorecards are kinda our thing



Overview of Morningstar's Fund Ratings

Rating	Iconography	Type of Assessment	Mutual Fund Rating	Eligibility Requirement
Star Rating (Incept: 2002)	★★★★★	<ul style="list-style-type: none">▶ Backward-looking, quantitative▶ Based on past risk-adjusted returns	Morningstar Category Peers	36 months of returns
Analyst Rating (Incept: 2011)	Gold Silver Bronze Neutral Negative	<ul style="list-style-type: none">▶ Forward-looking, qualitative▶ Based on analysts' assessment of people, process, parent, and fees	Morningstar Category Index	None
Quantitative Rating (Incept: 2017)	Gold ^Q Silver ^Q Bronze ^Q Neutral ^Q Negative ^Q	<ul style="list-style-type: none">▶ Forward-looking, quantitative▶ Based on algorithmic assessment of people, process, parent, and fees	Morningstar Category Index	1 month of returns
Sustainability Rating (Incept: 2019)	●●●●●	<ul style="list-style-type: none">▶ Backward-looking, quantitative▶ Based on ESG risk assessment of funds' portfolio holdings	Morningstar Category Peers	Various

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Cloud cost and risk scores

Public Cloud Cost Report



The Public Cloud Cost Star Rating transparently measures cost optimization potentials and provides teams a self-service method to manage AWS. You can directly view cloud cost impact per resource in each Jira ticket. Rating methodology is determined by cost optimization targets and AWS Trusted Advisor. Ticket severity is determined by **total monthly savings potential**. For full methodology, steps to resolve, and FAQs see the [Public Cloud Cost Star Scorecard wiki](#).

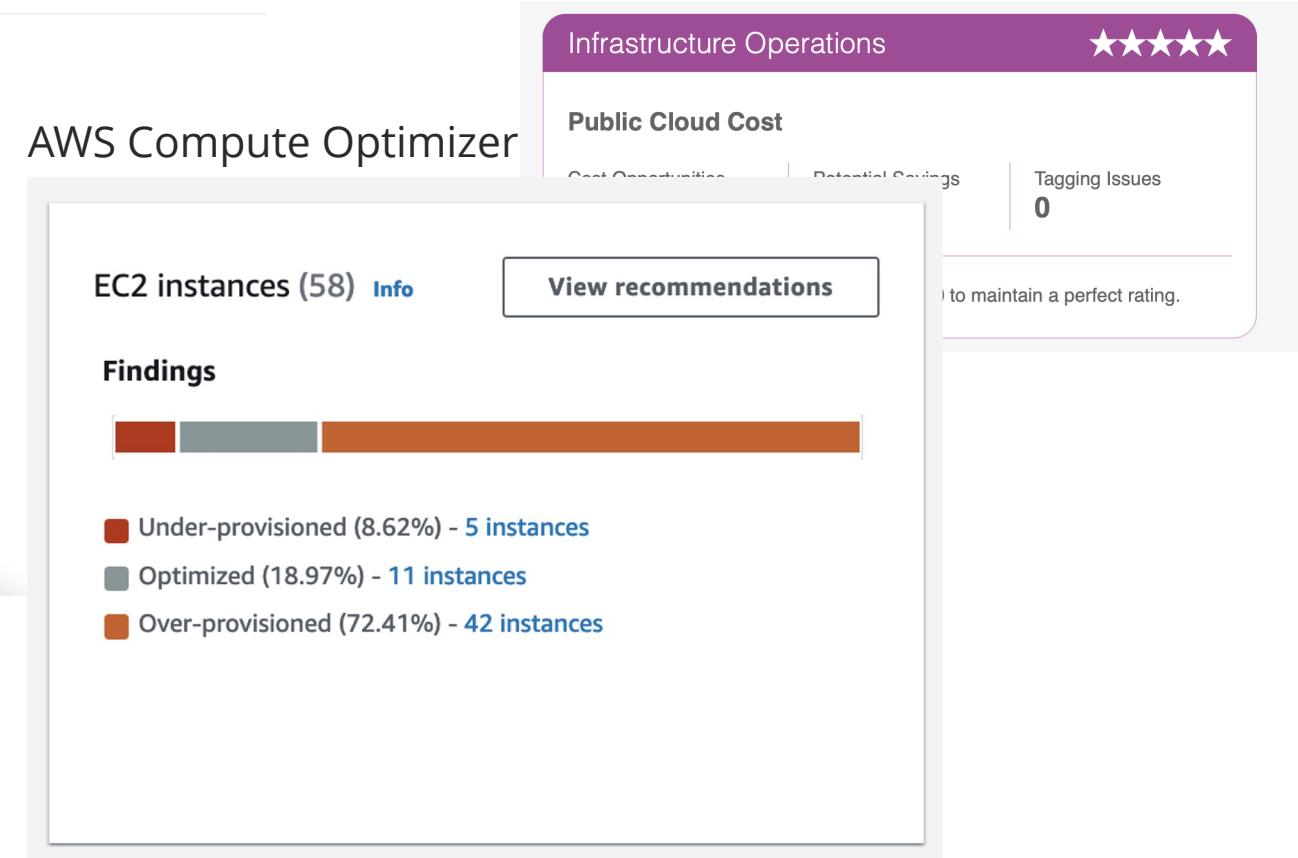
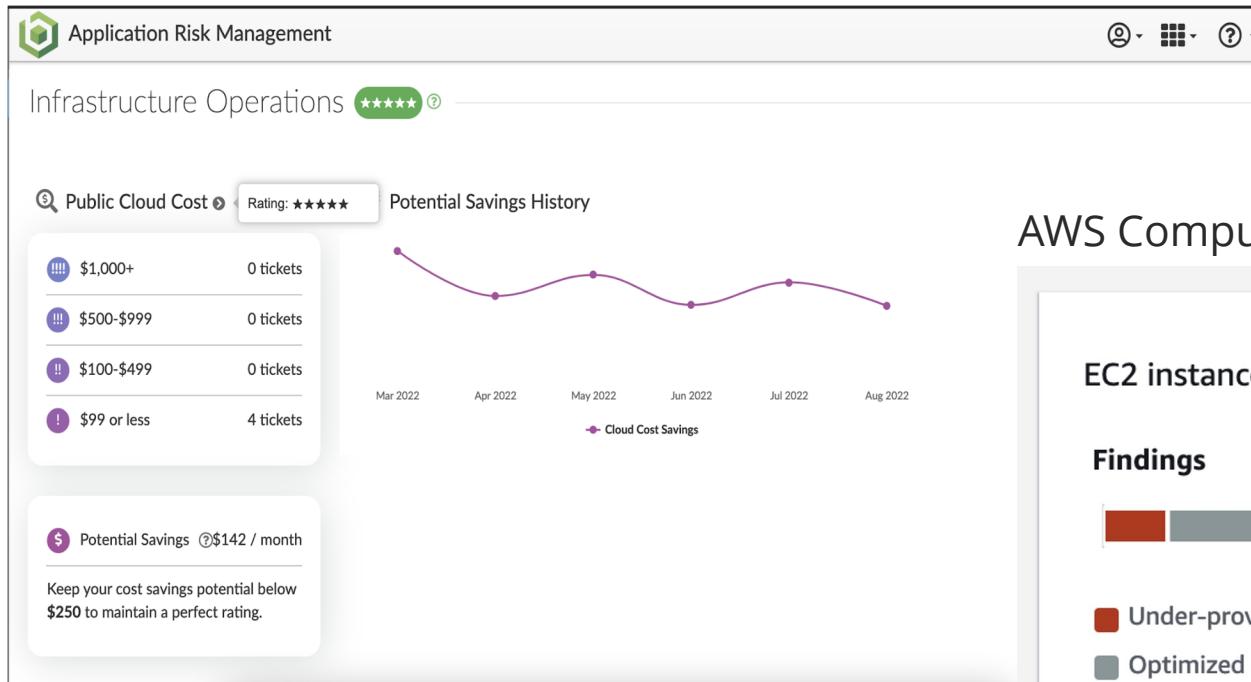


Subscribe users to this report by requesting access to the **Public Cloud Finance AD Group** in Sailpoint.

Product	TID	Cost Rating	Potential Savings (\$/month)	Change	Total Tickets	Critical	High
Credit Rating	CR	★	\$4,121	▼ \$36	70	0	1
DBRS	DBRS	★	\$3,851	\$0	210	0	0
Data Collection	DC	★	\$2,545	▲ \$2	183	0	0
Information Security	INFOSEC	★	\$2,389	\$0	35	0	1
SUST Company Documents Crawler	SUSTCRL	★★	\$1,197	▲ \$16	23	0	0
Direct	DO	★★	\$1,110	▲ \$15	34	0	0
Realtime Data	RTD	★★	\$1,099	\$0	31	0	0
AdviserLogic	ADL	★★	\$1,031	▲ \$29	27	0	0
Workplace	WORK	★★★	\$899	▼ \$45	16	0	0
Data Services	DATASVC	★★★	\$797	▼ \$11	25	0	0

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Cloud cost and risk scores



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Actionable information

🔍 Public Cloud Cost

!!!! \$1,000+	0 tickets
!!! \$500-\$999	0 tickets
!! \$100-\$499	0 tickets
! \$99 or less	6 tickets

">\$ Potential Savings ⚡ \$17 / month

Keep your cost savings potential below \$250 to maintain a perfect rating.

⌚ Potential Savings History

Mar 2022 Apr 2022 May 2022 Jun 2022 Jul 2022 Aug 2022

Cloud Cost Savings

Public Cloud Findings / PCLFI-134519

Low Utilization Amazon EC2 Instances: i-0b67d6bbf00d66c

Edit Add comment Assign More Start Progress Start Analysis

Details

Type:	<input checked="" type="radio"/> Public Cloud Finding	Status:
Priority:	<input checked="" type="radio"/> 4-Low	Resolution:
Component/s:	None	<input type="button"/> Resolution
Labels:	active	
Rework Count:	0	
Cost:	66.82	
Component Name:		
Cloud Region:	us-west-2	
Account ID:		
AWS Environment:	non-prod	
Finding:	cost_optimization_ec2_utilization	
Service ID:	ts00480	
Team ID:	CLOUDSVC	

Description

Resource i-0b67d6bbf00d66c could use some cost optimization. Please advise. You could save \$66.82. EC2 CPU utilization was 10% - Could you stop or terminate the instance? Could you use Auto Scaling? Could you follow the recommendations on the Cost Star Rating wiki: <https://mswiki.morningstar.com/display/CLOUDSVC/Public+Cloud+Cost+Star+Scorecard+-+Informational+Page>

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Cloud Cost Savings

⌚ Public Cloud Findings / PCLFI-134519

Low Utilization Amazon EC2 Instances: i-0b67d6bbf00d66c

Edit Add comment Assign More Start Progress Start Analysis

Details

Type: Public Cloud Finding Status: Open
Priority: 4-Low Resolution: Unresolved
Component/s: None Resolution
Labels: active
Rework Count: 0
Cost: 66.82 Resolution
Component Name:
Cloud Region: us-west-2
Account ID:
AWS Environment: non-prod
Finding: cost_optimization_ec2_utilization
Service ID: ts00480
Team ID: CLOUDSVC

Description

Resource i-0b67d6bbf00d66c could use some cost optimization. Please advise.
You could save \$66.82
EC2 CPU utilization was 10% - Could you stop or terminate the instance? Could you use Auto Scaling? Could you follow the recommendations on the Cost Star Rating wiki: <https://mswiki.morningstar.com/display/CLOUDSVC/Public+Cloud+Cost+Star+Scorecard+-+Informational+Page>

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Actionable information

The image shows two screenshots illustrating the connection between a security operations dashboard and a detailed ticket view.

Left Screenshot: Security Operations Dashboard

This dashboard provides a quick overview of ticket counts by priority:

- Critical: 0 tickets
- High: 35 tickets
- Medium: 6 tickets
- Low: 2 tickets

Right Screenshot: AWS Scanning: DynamoDB Table with no backup strategy - mstar-cap-terraform-lock

This is a detailed view of a Public Cloud Finding ticket (PCLFI-45363). A red arrow points from the "Medium" priority section of the dashboard to the "3-Medium" priority field in the ticket details.

Ticket Details:

- Type: Public Cloud Finding
- Status: OPEN (View Workflow)
- Priority: 3-Medium
- Resolution: Unresolved
- Component/s: None
- Labels: active
- Rework Count: 0
- Cost: 0
- Component Name: mstar-cap-terraform-lock
- Cloud Region: us-east-1
- Account ID: prod
- AWS Environment: awsdr_backup_dynamodb_scanning
- Finding: No SERVICEID tag specified in resource.
- Service ID: CAP
- Team ID: CAP

Description:

Account Number: prod
Table: mstar-cap-terraform-lock
Message: no_on_demand_backups_available

Information on AWS Backup guidelines can be found here:
<https://mswiki.morningstar.com/display/CLOUDSVC/Understanding+CloudSVC+notification+email+messages>

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Actionable information

The dashboard shows the following ticket counts:

- Critical: 0 tickets
- High: 35 tickets
- Medium: 6 tickets
- Low: 2 tickets

The detailed view for the AWS finding "AWS Scanning: DynamoDB Table with no backup strategy - mstar-cap-terraform-lock" includes the following information:

Details

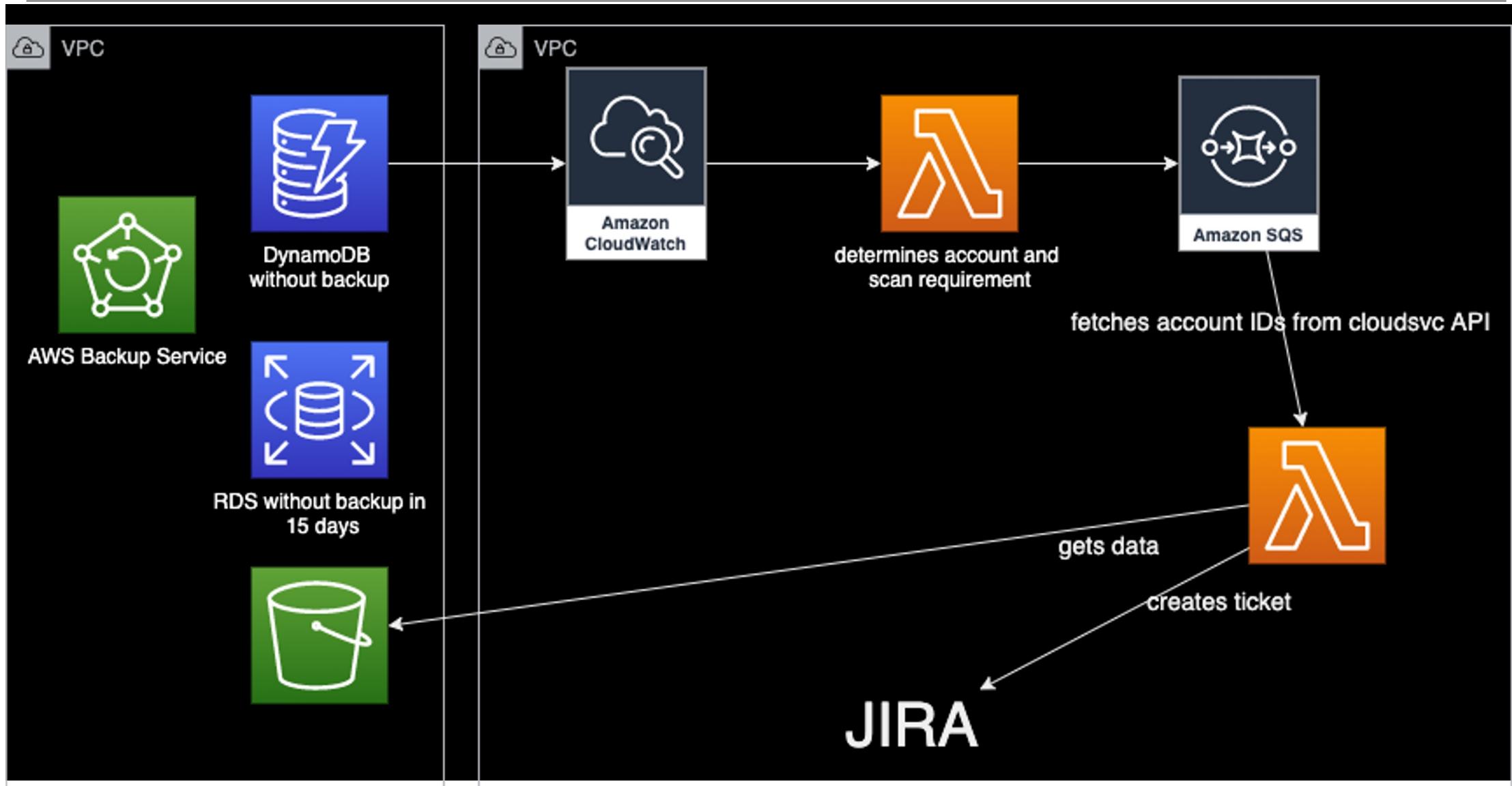
Type:	Public Cloud Finding
Priority:	3-Medium
Component/s:	None
Labels:	active
Rework Count:	0
Cost:	0
Component Name:	mstar-cap-terraform-lock
Cloud Region:	us-east-1
Account ID:	prod
AWS Environment:	awsdr_backup_dynamodb_scanning
Findings:	No SERVICEID tag specified in resource.
Service ID:	CAP
Team ID:	

Description

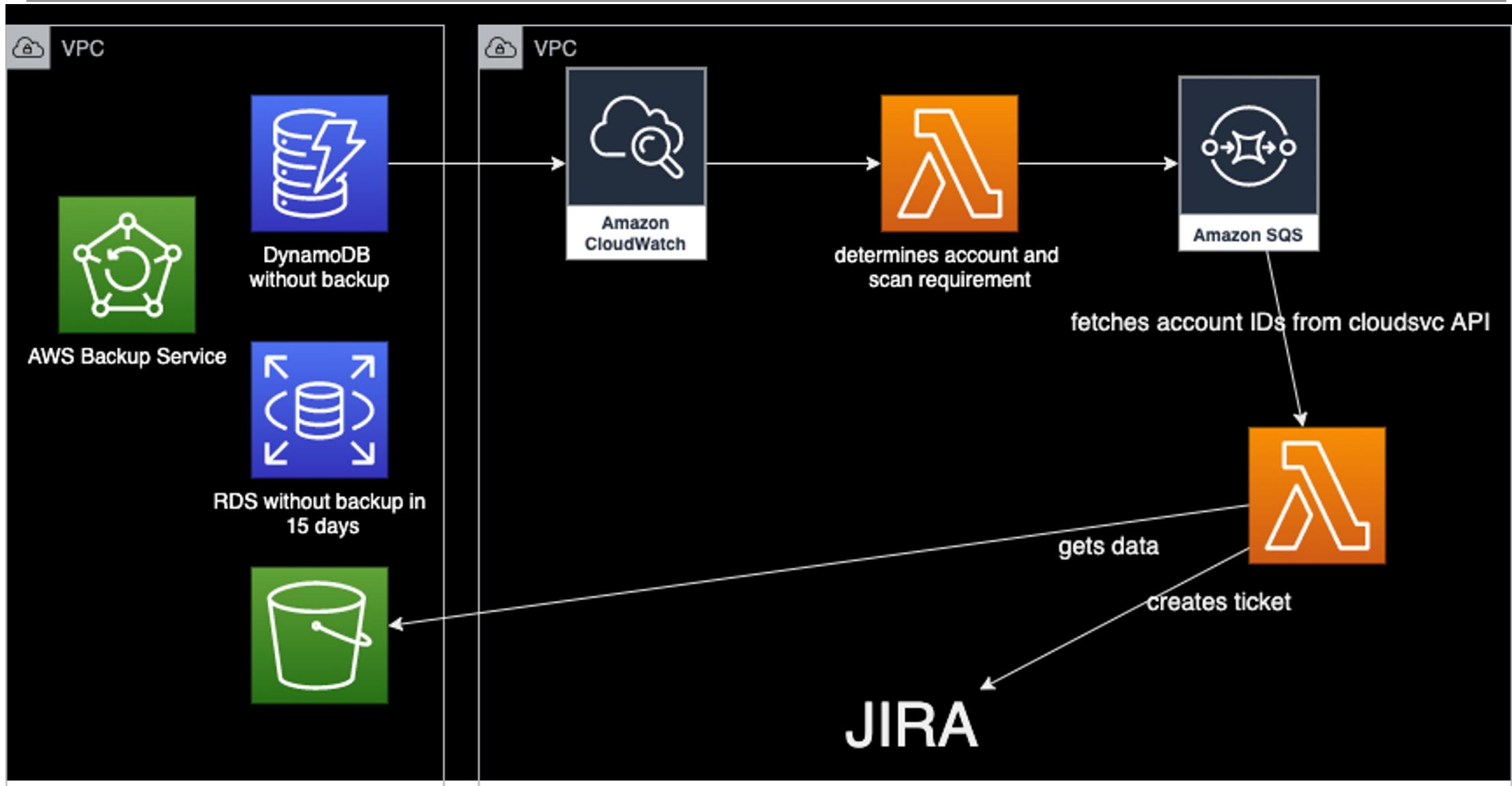
Account No.: prod
Table: mstar-cap-terraform-lock
Message: no_on_demand_backups_available

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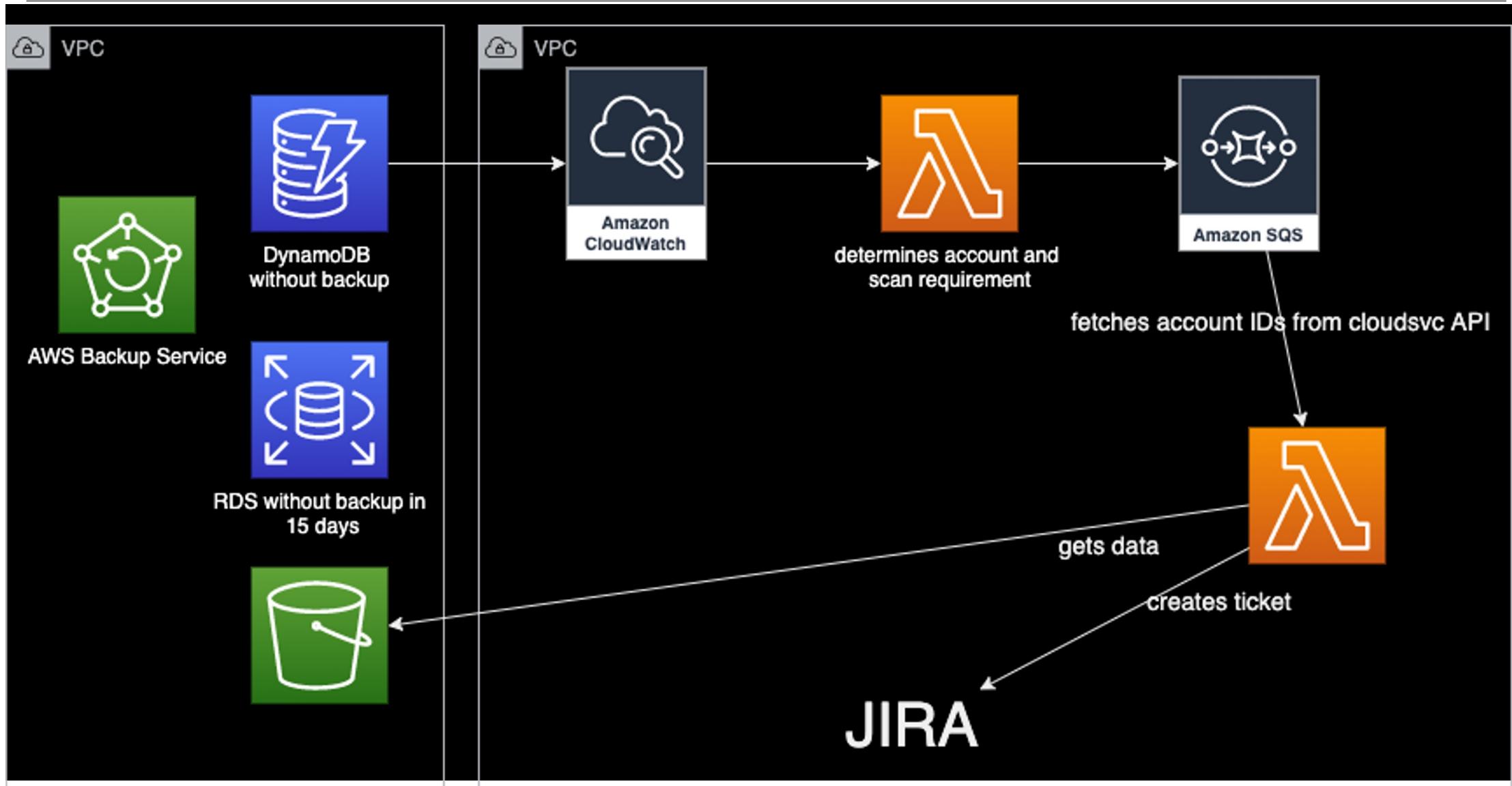
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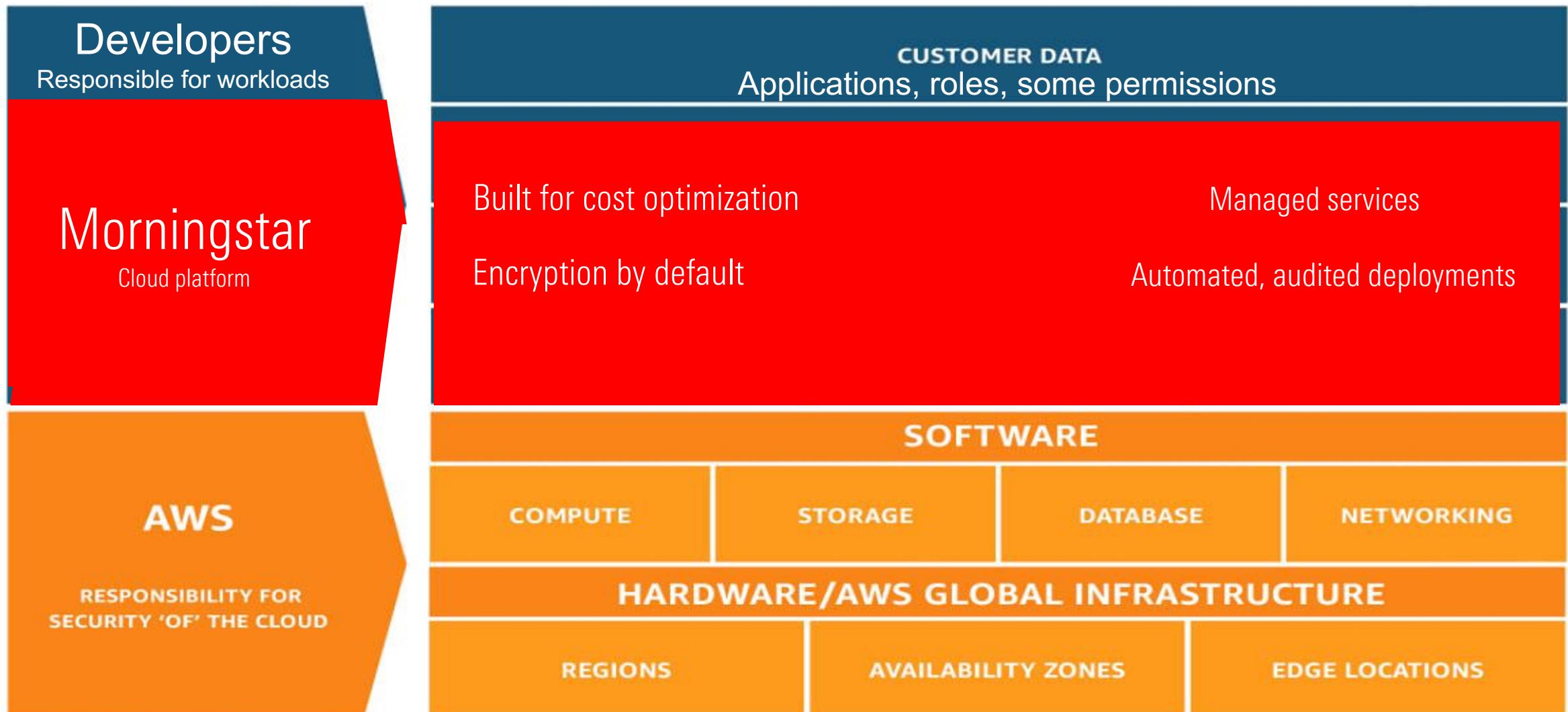


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Guardrails in cloud

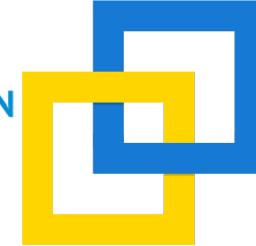




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Margaret Valtierra (she/her)

 @Margaretvaltie@awscommunity.social

  MargaretValtie

