

# PRESS RELEASE

## UPTICK DATA TECHNOLOGIES EXTENDS DATA DISTRIBUTION RELATIONSHIP WITH MORNINGSTAR

**San Francisco, January 23, 2006** – UpTick Data Technologies, a leader in customized sales and client communication solutions utilizing rules based text generation today announced the availability of Morningstar data for use with its full suite of mutual fund reporting solutions.

Morningstar fund performance, risk and descriptive data including the proprietary Morningstar Rating™ for funds, Morningstar Style™ Box and Morningstar Categories are now available in UpTick's retirement plan sponsor reporting solutions, which automate the production and distribution of quarterly reports to plan sponsors. UpTick's mutual fund research portal, *www.FundXtra.com* will offer reports using Morningstar data early this year.

"There is no doubt that Morningstar is one of the most highly regarded investment data providers and is always on the short list of those requested by our clients," said Mike Iapalucci, Partner at UpTick. "We are committed to providing clients with their preferred choice of data and are delighted to add Morningstar to the list of sources available with all of UpTick's solutions," added Mr. Iapalucci.

### **About UpTick Data Technologies**

UpTick Data Technologies automates the process of creating commentary on investment products and financial markets through the use of proprietary "rules based text generation" technology. UpTick combines this patented technology with report building skills to create customized, value added financial communication products. Incorporating data from leading financial information vendors, together with client data, UpTick's commentary and reports are used by financial advisors, broker/dealers, investment managers and information vendors to more easily and effectively communicate with their clients. For more information or to download sample commentary and reports, please visit *www.uptickdata.com*.

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### **About Morningstar**

Morningstar, Inc. is a leading provider of independent investment research in the United States and in major international markets. The company offers an extensive line of Internet, software, and print-based products and services for individuals, financial advisors, and institutional clients. Morningstar provides data on more than 125,000 investment offerings, including stocks, mutual funds, and similar vehicles. The company has operations in 16 countries.

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