

Morningstar Accessibility Conformance Report

WCAG Edition

(Based on VPAT[®] Version 2.5)

Name of Product/Version: Direct Advisory Suite (Investing Center)

Report Date: 6 October 2025

Product Description: Investing Center Instance

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Notes:

Evaluation Methods Used: NVDA, CCA, Chrome, HeadingsMap , WAVE

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Applicable Standards/Guidelines

This report covers the degree of conformance for the following accessibility standard/guidelines:

Standard/Guideline	Included In Report
Web Content Accessibility Guidelines 2.0	Level A (Yes) Level AA (Yes) Level AAA (No)
Web Content Accessibility Guidelines 2.1	Level A (Yes) Level AA (Yes) Level AAA (No)
Web Content Accessibility Guidelines 2.2	Level A (No) Level AA (No) Level AAA (No)

Terms

The terms used in the Conformance Level information are defined as follows:

- **Supports:** The functionality of the product has at least one method that meets the criterion without known defects or meets with equivalent facilitation.
- **Partially Supports:** Some functionality of the product does not meet the criterion.
- **Does Not Support:** The majority of product functionality does not meet the criterion.
- **Not Applicable:** The criterion is not relevant to the product.
- **Not Evaluated:** The product has not been evaluated against the criterion. This can only be used in WCAG Level AAA criteria.

WCAG 2.x Report

Note: When reporting on conformance with the WCAG 2.x Success Criteria, they are scoped for full pages, complete processes, and accessibility-supported ways of using technology as documented in the [WCAG 2.0 Conformance Requirements](#).

Table 1: Success Criteria, Level A

Criteria	Conformance Level	Remarks and Explanations
1.1.1 Non-text Content (Level A)	Partially Supports	Some cases observed where Alt text was not present, For many instances the alt text was insufficient. Example: 1.The Figure present under the Global Market Barometer(1Y) on Home Screen 2.Performance Chart on Compare Screen
1.2.1 Audio-only and Video-only (Prerecorded) (Level A)	Not Applicable	No Instances observed
1.2.2 Captions (Prerecorded) (Level A)	Supports	All prerecorded videos with audio have synchronized captions for all spoken content
1.2.3 Audio Description or Media Alternative (Prerecorded) (Level A)	Not Applicable	No Instances observed
1.3.1 Info and Relationships (Level A)	Partially Supports	Instances of Incorrect heading structures were observed. Example: 1. The text "U. S Securities", "Global Securities" on Home screen should be tagged as heading level 2 instead of heading level 1 2. The text "Help" should be correctly tagged as heading level 2 instead of heading level 4 on Navigation Screen
1.3.2 Meaningful Sequence (Level A)	Partially Supports	Instances were observed where content was not presented in a meaningful sequence Example: 1.Incorrect reading order of content on Edit Layout Screen
1.3.3 Sensory Characteristics (Level A)	Supports	Instructions do not rely solely on sensory characteristics
1.4.1 Use of Color (Level A)	Supports	Color is not the sole method of conveying information
1.4.2 Audio Control (Level A)	Not Applicable	No auto-playing audio is present

2.1.1 Keyboard (Level A)	Partially Supports	Instances were observed where certain functionality is not operable via keyboard alone Example: 1. Support Site link and Contact Support link in the Help Dialog 2. All links in the "Profile" dialog
2.1.2 No Keyboard Trap (Level A)	Supports	No instances of keyboard traps were observed
Criteria	Conformance Level	Remarks and Explanations
2.1.4 Character Key Shortcuts (Level A 2.1 and 2.2)	Not Applicable	No single-character keyboard shortcuts are used
2.2.1 Timing Adjustable (Level A)	Not Applicable	No time-limited functionality is present
2.2.2 Pause, Stop, Hide (Level A)	Not Applicable	No moving or auto-updating content is present
2.3.1 Three Flashes or Below Threshold (Level A)	Not Applicable	No flashing content is present
2.4.1 Bypass Blocks (Level A)	Partially Supports	The skip to main content link is implemented on the Home page but it is not working as expected
2.4.2 Page Titled (Level A)	Does Not Support	The page title of all pages insufficiently describes the page purpose.
2.4.3 Focus Order (Level A)	Partially Supports	Instances were observed where keyboard focus does not follow a logical order Example: 1.Tab focus moves to "21,159 Securities" that should not receive focus due to its state on Screen and Stocks page
2.4.4 Link Purpose (In Context) (Level A)	Partially Supports	There are links with insufficiently descriptive accessible names. Example: 1.Watch links on Stocks Screen

2.5.1 Pointer Gestures (Level A 2.1 and 2.2)	Not Applicable	N/A
2.5.2 Pointer Cancellation (Level A 2.1 and 2.2)	Not Applicable	N/A
2.5.3 Label in Name (Level A 2.1 and 2.2)	Partially Supports	Some instances were observed where the accessible name did not match the visible label. Example: 1. Accessible name "General Site Search" does not match the visible label "Search Quotes and Site" on the Home Screen 2. The form field "Select a State" on 529 Plan Center Screen
2.5.4 Motion Actuation (Level A 2.1 and 2.2)	Not Applicable	No functionality relies solely on motion gestures
3.1.1 Language of Page (Level A)	Supports	The page language is correctly defined in the HTML lang attribute
3.2.1 On Focus (Level A)	Supports	No instances were observed where focusing on an element triggers an automatic change of context
3.2.2 On Input (Level A)	Supports	No instances were observed where changing an input value caused unexpected changes to the content on the screen.
3.2.6 Consistent Help (Level A 2.2 only)	Supports	Help content is the same or functionally equivalent across pages.
3.3.1 Error Identification (Level A)	Supports	All input errors are clearly identified and described
3.3.2 Labels or Instructions (Level A)	Supports	All input fields have clear labels or instructions guiding users on what information to enter and how to provide it
3.3.7 Redundant Entry (Level A 2.2 only)	Not Applicable	N/A
4.1.1 Parsing (Level A)	Supports	The page markup is valid and correctly structured

4.1.2 Name, Role, Value (Level A)	Partially Supports	Instances were observed where elements do not have proper programmatic name, role, or value Example: 1.Button “See All Results” is incorrectly tagged as a link on Home Screen 2.Role not provided for “Link” Element on Home Screen 3. The accessible name of the button "View More" on Home Screen doesn't clearly describe its function or purpose.

Table 2: Success Criteria, Level AA

Criteria	Conformance Level	Remarks and Explanations
1.2.4 Captions (Live) (Level AA)	Not Applicable	No live audio content
1.2.5 Audio Description (Prerecorded) (Level AA)	Not Applicable	Prerecorded videos contain no important visual information
1.3.4 Orientation (Level AA 2.1 and 2.2)	Supports	Supports both portrait and landscape orientation
1.3.5 Identify Input Purpose (Level AA 2.1 and 2.2)	Supports	All input fields, including dropdowns and filters, have programmatically defined purposes
1.4.3 Contrast (Minimum) (Level AA)	Supports	All text meets the minimum contrast requirements
1.4.4 Resize text (Level AA)	Partially Supports	There is content that disappears, overlaps, or is cut off when viewing the page at 200% browser zoom and a 1280-pixel viewport width. Example : 1.Main content area on Credit Screen
1.4.5 Images of Text (Level AA)	Supports	Only instance is the company logo which is used in a compliant form.
1.4.10 Reflow (Level AA 2.1 and 2.2)	Partially Supports	There is content that disappears, overlaps, is cut off, or requires horizontal scrolling to view when the page has a viewport width of 320 CSS pixels.

		Example: 1.Main page content on 529 Plan Center Screen
1.4.11 Non-text Contrast (Level AA 2.1 and 2.2)	Supports	All non-text elements meet the minimum contrast requirements
1.4.12 Text Spacing (Level AA 2.1 and 2.2)	Supports	Content remains readable and usable when text spacing is increased
1.4.13 Content on Hover or Focus (Level AA 2.1 and 2.2)	Supports	All content appearing on hover or focus remains accessible and visible
2.4.5 Multiple Ways (Level AA)	Supports	Multiple navigation methods are provided, allowing users to access content in different ways
2.4.6 Headings and Labels (Level AA)	Partially Supports	Some headings or labels are unclear or non-descriptive
2.4.7 Focus Visible (Level AA)	Partially Supports	There are interactive controls without a visible keyboard focus indicator Example: 1.Action table header on Watchlists Screen
2.4.11 Focus Not Obscured (Minimum) (Level AA 2.2 only)	Partially Supports	There are focused elements that are fully obscured by other content Example: 1.Controls at the top of section (i.e., table headers in the "Market Indexes" section) on the Home Dashboard Screen
2.5.7 Dragging Movements (Level AA 2.2 only)	Does Not Support	1 instance on the home page where you can realign modules, this does not support keyboard controls.
2.5.8 Target Size (Minimum) (Level AA 2.2 only)	Supports	Some interactive elements are smaller than 44x44 pixels but have sufficient spacing from other elements to prevent accidental activation
3.1.2 Language of Parts (Level AA)	Not Applicable	All content is in a single language

3.2.3 Consistent Navigation (Level AA)	Supports	Navigation mechanisms are consistent across pages in terms of placement, appearance, and labeling
Criteria	Conformance Level	
3.2.4 Consistent Identification (Level AA)	Supports	Elements with the same functionality are consistently identified
3.3.3 Error Suggestion (Level AA)	Supports	Error Suggestion is available for the elements.
3.3.4 Error Prevention (Legal, Financial, Data) (Level AA)	Not Applicable	No legal, financial, or critical data submissions are present
3.3.8 Accessible Authentication (Minimum) (Level AA 2.2 only)	Not Applicable	No authentication functionality is present
4.1.3 Status Messages (Level AA 2.1 and 2.2)	Partially Supports	Instances were observed where users were not notified about dynamic content updates Examples: 1.Alert message "This item has been added to bookmarks" is not implemented on Mutual Funds Screen 2. "No results remove one or more filters...etc." status message is not announced by the screen reader. when the user hits the "Apply" button on Screen Menu