

# DIGITAL RESOURCE GUIDE BUSINESS & INVESTING

# MORNINGSTAR®

**MORNINGSTAR®**

Investment Research Center™

Provided by Lincolnwood Public Library

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Home Equity Funds ETF Planning & Education Articles & Videos Help Newsletters  Go

## Equity



### Screen for Stocks

Get comprehensive financial information on New York Stock Exchange, American Stock Exchange, and NASDAQ stocks.

- Equity Markets
- Equity Analyst Reports
- Equity Portfolios

## Funds



### Screen for Funds

Find comprehensive financial information on thousands of mutual funds, including each fund's Morningstar rating.

- Mutual Funds
- Target Date Funds
- Sustainability

## ETF



### Screen for ETFs

See financial information on hundreds of exchange-traded funds with up-to-date information on returns, reports, and Morningstar ratings.

- ETF Markets

## Planning and Education



### Access Tools

Test drive our robust yet easy-to-use portfolio tools to determine what your asset mix should be, discover overlapping exposure hidden within your portfolio, learn from the Investing Classroom, and more.

- Portfolio X-Ray
- Retirement Cost Calculator
- College Cost Calculator
- Investing Classroom



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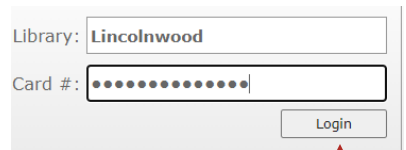
# What is Morningstar Investment Research Center?

Morningstar can be used to analyze stocks, mutual funds, and exchange-traded funds (ETFs). You can use its data and reports to guide your investments; see how specific stocks and funds might work together in a portfolio; or learn about investing through articles, videos, and tutorials.

## How to Access Morningstar




1. Go to the library's website, [lincolnwoodlibrary.org](http://lincolnwoodlibrary.org)
2. Hover over **Resources** and select **Resource Quick Links**.
3. Select **View Resource** to the right of **Morningstar Investment Research Center**.
4. Depending on your location, select to access **in library only** or **View Resource** for or outside the Library. Then enter your Lincolnwood library card number **21242000XXXXXX** and then select **Log In**.

There is a limit to how many cardholders can use this resource at the same time. If you can't access the site, try logging in again later. When you're finished, click **End Session**.



## The homepage

Use the menu bar or **Equity**, **Funds**, and **ETF** sections to start searching for financial information. Filter or screen based on

Equity	Funds	ETF
		
<b>Screen for Stocks</b> Get comprehensive financial information on New York Stock Exchange, American Stock Exchange, and NASDAQ stocks. <ul style="list-style-type: none"><li>• Equity Markets</li><li>• Equity Analyst Reports</li><li>• Equity Portfolios</li></ul>	<b>Screen for Funds</b> Find comprehensive financial information on thousands of mutual funds, including each fund's Morningstar rating. <ul style="list-style-type: none"><li>• Mutual Funds</li><li>• Target Date Funds</li><li>• Sustainability</li></ul>	<b>Screen for ETFs</b> See financial information on hundreds of exchange-traded funds with up-to-date information on returns, reports, and Morningstar ratings. <ul style="list-style-type: none"><li>• ETF Markets</li></ul>

From the homepage, use **Portfolio X-Ray** analyze your assets to industry standards. Select View **Holdings & Benchmark** to enter your assets for review.

Home Equity Funds ETF Planning & Education Articles & Videos Help Newsletters

Use the menu bar to navigate to even more information in each section. Each section has subsections to help you find analyst market and research reports, comparisons, ratings, and more.

Home Equity Funds ETF Planning & Education  
Overview Markets Research Favorites Screener Archive

Plan for long-term goals like college or retirement with the help of specific goal calculators on the homepage.

Find ETFs by markets, see **Sector Reports** in **ETF > Research**, and browse latest analyst reports in the ETF tab.

### Research a specific stock

Type its ticker symbol or company name into the search box.

Go

Scroll or use the ☰ menu to see sections of reports on stocks. You will see an **Overview** of performance in the **Quote** section. Use sections to find **Company Profiles** and comparisons to **Competitors**.

Tabs of regularly updated information include **Analysis** articles, **Price vs. Fair Value**, **Key Statistics**, **Dividends & Splits**, **Financial Statements**, **Ownership** and **Executive Team** info, and more.

Morningstar Report Company Report

☰ ↓

Alphabet Inc Class C GOOG ★★★★★

Show Full Chart > After Hours: \$111.22 0.08 | 0.07%

\$111.30 ↓ 6.40 | 5.44%

Overview

Key Ratios

Trading Information

News

Last Close

Sector

Industry

Investment Style

110

Communication

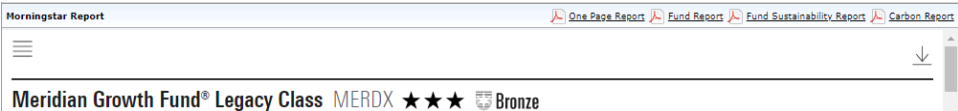
Internet Content

□ □ □

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# Fund pages

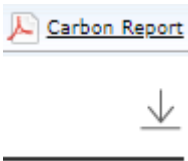
Fund page layout is similar, with **Morningstar's Analysis and Performance** offering basics and in-depth analysis. The **Portfolio** section shows fund positions and assets. The **Price** section shows any fees associated with a fund.



# Exporting and printing

Most pages allow you to easily print what you are looking at by clicking the ↓ button to the right of the ≡ menu button.

You can also export information for further review later by selecting various **PDF Reports**. Remember to save the report somewhere convenient on your device like Desktop, Documents, or Downloads.



# Introduction to Screeners

A **screener** is the financial industry term for advanced search. You can use the Morningstar screeners to find stocks, funds, and ETFs based on multiple specified criteria. There are basic options for screens, or you can use many available filter tools..

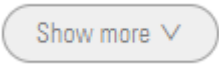
- From the Morningstar home screen, click **Screen for Stocks**, **Screen for Funds**, or **Screen for ETFs** to get started. Or select **Screener** in the **Equity** (stocks), **Funds**, or **ETFs** tabs any time.

<b>Sector</b>	<b>Industry</b>	<b>Exchange</b>
All	Select Industries	Select one or several items
<b>5 Yr Growth % - Net Income</b>	<b>5 Yr Growth % - Revenue</b>	<b>5 Yr Growth % - EPS</b>
All	All	All

Use the menus to fill out options. As you do, results update automatically beneath the options menus. Change options to **All** or select **X** buttons to clear. Or select **Reset Filters** to start over.



- You may need to scroll left/right or up/down to see full screener menus.
- Select **Show more** ▾ to view every screener option available.



Options vary in the three different screeners.

### Screener results

Unless there are no results matching your criteria, results load automatically as you select options.

Review and analyze your search results

The screenshot shows a financial screener interface with several annotations:

- Overview**: A tab in the top navigation bar.
- 2/649**: A count of results.
- Export selected items**: A button with a download icon.
- Compare selected items**: A button with a comparison icon.
- Sections**: A label pointing to the table headers.
- Selection checkboxes**: A label pointing to the checkboxes in the first column of the table.
- Standard reports**: A label pointing to the 'IDR' and 'Fund Report' buttons in the last column of the table.

<input type="checkbox"/>	Name	Ticker	Morningstar category	Morningstar rating	Morningstar Analyst Rating™	Morningstar Risk Rating	Fee Level	IDR	Fund Report
<input checked="" type="checkbox"/>	Abbey Capital Futures Strategy I	ABYIX	Systematic Trend	****	Silver	Below Avg	Above Average	IDR	Fund Report
<input type="checkbox"/>	Alger Mid Cap Focus Y	ALOYX	Mid-Cap Growth	****	Silver	Above Avg	Below Average	IDR	Fund Report
<input checked="" type="checkbox"/>	Alger Mid Cap Focus Z	AFOZX	Mid-Cap Growth	****	Silver	Above Avg	Low	IDR	Fund Report

Choose between different tabs above the first results such as Overview, Research, Performance, Portfolio, Risk, Profitability, and more in various screeners to evaluate results.

Click through on IDR or Analyst Report links to see even more information on individual screener results. IDR stands for Investment Details Report. These reports open in new tabs.

### Other tools and Training

From any page, look at the top navigation bar to access several other tools to help with your investing:

For more detailed instruction, book a one-on-one session with a librarian. Registration requires a Lincolnwood Library Card. For scheduling, contact Adult Services at (224) 233-1859.

**Articles & Videos** has an archive of content organized by date or by factors like **Author** and topic **Collections** Including basic to advanced sources on specific financial topics. **Help** includes user guides, monthly training sessions, and an investment terms glossary. From the homepage, select **Investing Classroom** for courses from the basics to advanced topics.

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Video tutorials organized by topics in tabs are available at:  
[https://ar.morningstar.com/mirc/help/help\\_playall.aspx](https://ar.morningstar.com/mirc/help/help_playall.aspx)

Tutorial Center

Play All   Introduction   Equity   Funds   ETF   Planning & Education   **Articles & Videos**   Help   Newsletters

## Logging out

When you are done using any part of Morningstar Investment Research Center, please click **End Session** in the upper right corner of the screen so that others may use our limited number of simultaneous users.

End Session

Session Ended

Your session has ended.

Thank you for using Morningstar® Investment Research Center<sup>SM</sup>.

## Browsers and apps



Morningstar is best used with the latest versions of Google Chrome, Mozilla Firefox, Microsoft Edge, and Apple Safari. Internet Explorer is no longer supported.

Morningstar Investment Research Center does not have a mobile app, but can work on smartphones and tablets. It is best used on desktop or laptop computers with large screens.

# Methodology and Analyst Rating Scale

## The Morningstar Five Pillars Methodology

Funds are evaluated on five key pillars—Process, Performance, People, Parent, and Price—which analysts believe lead to funds likely to outperform long term on a risk-adjusted basis. Analysts assign ratings of positive, neutral, or negative to each pillar.

- **Process** – What is the fund’s strategy and does management have a competitive advantage enabling it to execute the process well and consistently over time?
- **Performance** – Is the fund’s performance pattern logical given its process? Has the fund earned its keep with strong risk-adjusted returns over relevant time periods?
- **People** – An assessment of managerial talent, tenure, and resources associated with the fund.
- **Parent** – What priorities prevail at the firm, stewardship or salesmanship?
- **Price** – Is the fund a good value proposition compared with similar funds sold through similar channels?

## Morningstar Analyst Rating Scale

★★★

 Gold

Many issues are rated twice: general ratings from 1-5 stars, and analyst ratings, negative to gold, denoted with shields.

 Silver

 Bronze

 Neutral

 Negative

- **Gold** – Best-of-breed funds that distinguish themselves across the five pillars and deserve analyst conviction.
- **Silver** – Funds with advantages that outweigh the disadvantages across the five pillars and with sufficient level of analyst conviction to warrant positive ratings.
- **Bronze** – Funds with notable advantages across several, but perhaps not all, of the five pillars—strengths that give the analysts a high level of conviction.
- **Neutral** – Funds that aren’t likely to deliver standout returns but also aren’t likely to significantly underperform.
- **Negative** – Funds with at least one flaw likely to hamper performance significantly. Inferior to offerings of peers.

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