

Morningstar Library Edition provides three options for researching independent opinions on thousands of stocks and mutual funds and for analyzing portfolios. *Screeners* allows the user to search for over 18,000 stocks and mutual funds that meet specific criteria. *Reports* allows users to look up a specific stock or mutual fund. *Portfolio X-ray* allows the input of two or more stocks and/or mutual funds to determine how they work together as a portfolio.

To access Morningstar.com Library Edition

Go to: RCPL (<http://www.myrcl.com>)

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Click: **Research Tools**

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Click: **Morningstar.com Library Edition**

Click: **Inside the Library OR Home Access**

★ To begin a new search click the *Home* button at top left of database screen.

Computer commands, field names and mouse actions are in *Italics*.
Text that you must type is within single quote marks (' ').

1. I've heard that American Century Investments have consistently yielded high returns and want to see a list of all their funds.

- ☐ At the home page, without entering any information on the *Enter a Name or Ticker* line, click the *Get Report* button. This action displays a *Ticker Lookup* box.
- ☐ In the *Ticker Lookup* box, move the radio button to *Name Starts With*, type 'american century', and click *Go*.
- ☐ The previous step generates a long alphabetical list of all American Century funds by entire fund name in groups of thirty. (Note: ticker symbols are not alphabetical.) Clicking *Next 30* advances the list.
- ☐ Clicking a specific hyperlinked ticker will display that fund's *Snapshot Report*.
- ☐ Additional reports (*Analyst Research*, *Stewardship Grade*, *Morningstar Rating*, etc.) are listed on the left as hyperlinks.
- ☐ To see a *Fund Family* summary, click *Fund Family Data* at the top of the *Snapshot* page (just under the company name).

2. I need financial statements for Walgreen's, the pharmacy chain.

- ☐ At the home page, Type 'walgreen' (not 'walgreen's) in the *Enter a Name or Ticker* box (next to *Get Report*).
- ☐ Click *Get Report*. The name *Walgreen* and its ticker symbol will appear.
- ☐ Click the hyperlinked ticker symbol to pull up that company's information.
- ☐ On the left side of the screen will appear a number of clickable links, including one for *Financial Statements*. (Others include *Analyst Research*, *Morningstar Rating*, *Valuation Ratios*, etc.).

3. I would like to invest in bond funds and would like to see a list that Morningstar considers "good".

- ☐ At the home page, click the *Funds* tab at the top (or *Screen for Funds*).
- ☐ When the *Screener* box appears, click the rectangular *Morningstar Screens* button on the right side of the page. A large *Morningstar Screen* box will automatically open.

- ☐ From the *Select Screen* drop down menu, select the *Great Bond Funds* option, set the radio button to *View Results*, and click the *Open* button.
 - ☐ A list of bond fund names will be generated, each one clickable for greater detail. This list can be re-ordered by clicking fund name, analyst report, rating, stewardship grade, category, YTD return, or total assets.
- 4. A patron wants to invest only in mid-growth funds. Can Morningstar help?**
- ☐ Click the *Funds* tab at the top.
 - ☐ When the *Screener* box appears, use the drop-down menu at *Select Data to Screen On* to select *Special Fund Types* and then click the *Morningstar Screens* button.
 - ☐ When the *Morningstar Screen* box appears, use the drop down menu under *Select Screen* to find and select *Solid Mid-Growth Funds*.
 - ☐ Move the radio button to *View Results* and click *Open*.
 - ☐ Those items identified by the screen will be numbered. Clicking the large arrow button will display an alphabetical list (which also can be reordered as in question 3).
- 5. I would like to see annual reports for Amazon.com. I don't know the ticker.**
- ☐ At the home page, type 'amazon' (not 'amazon.com') in the rectangular search box beside *Get Report* button and click it.
 - ☐ This will automatically generate a list of companies containing the word 'amazon' in their names (there will be more than one).
 - ☐ From this list of companies, click the link for *Amazon.com (AMZN)*.
 - ☐ The *Quote* page will automatically open. This displays basic information about the company.
 - ☐ From the options on the left side of the *Quote* page, click *SEC Filings*.
 - ☐ This action opens an *Earnings Estimates and Analyst Opinions* page. On the left is a hyperlink for *Company Filings*. Clicking this will display links for dated quarterly and annual reports back to 1997.
- 6. I want to see funds recommended by Morningstar as well as those not recommended by Morningstar, i.e., ones to avoid.**
- ☐ At the *Funds* page, under *Select Data to Screen On*, select *Analyst Pick / Pan* (under the *General* group) and click the *View Results* button.
 - ☐ This will retrieve a very long alphabetical list which can be re-ordered according to the *Morningstar Rating System*. Simply click *Morningstar Rating* (between *Analyst Report* and *Stewardship Grade*) to rearrange the names so that those having five stars (the highest rating) appear first.
 - ☐ Clicking *Morningstar Rating* a second time re-arranges the names so that those having only one star (the lowest rating) head the list.
- 7. Can Morningstar teach me how to invest? It all seems rather complicated.**
- ☐ Click the *Help and Education* tab at the top, a one-stop shop for investment learning. A glossary and downloadable seminars on a variety of investing topics are available.