



A financial literacy program of the
Huntsville-Madison County Public Library



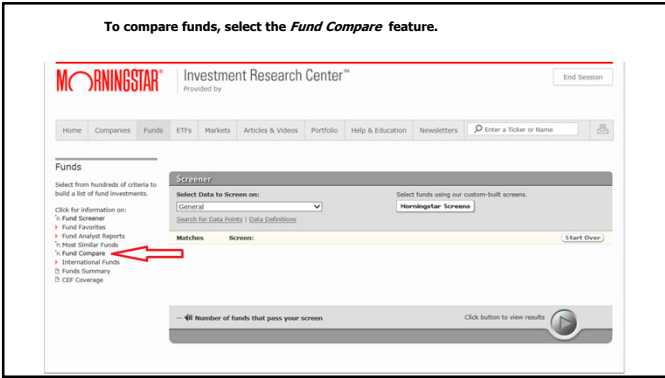
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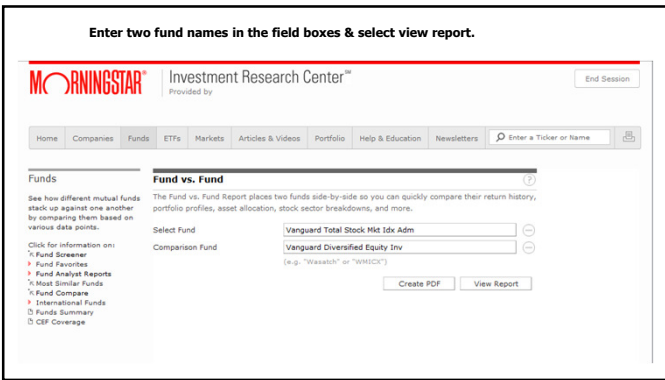
Select the **My Digital Library** link from the library's homepage (www.hmcpl.org)
to access the **Morningstar** database.

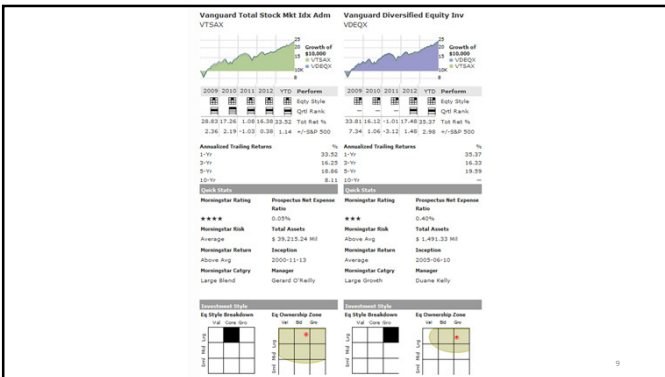


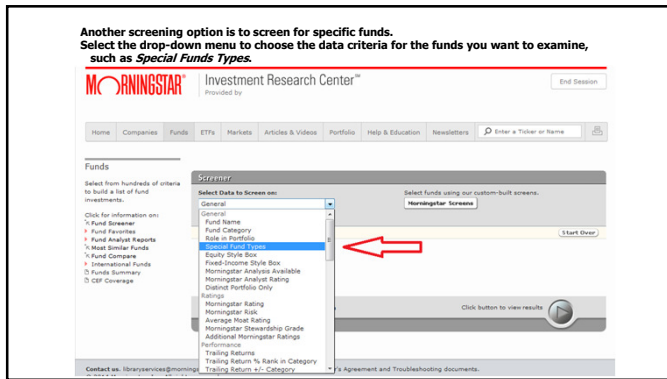
To compare funds, select the **Fund Compare** feature.

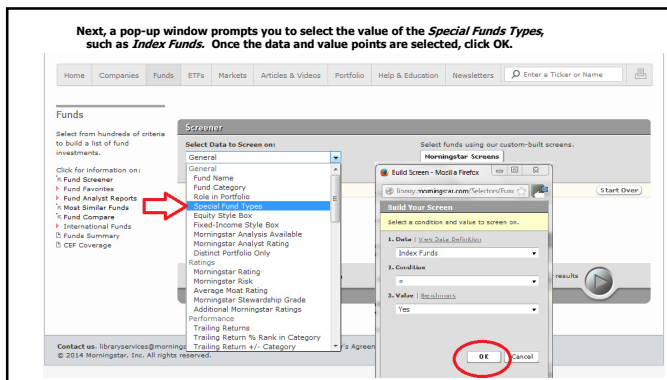


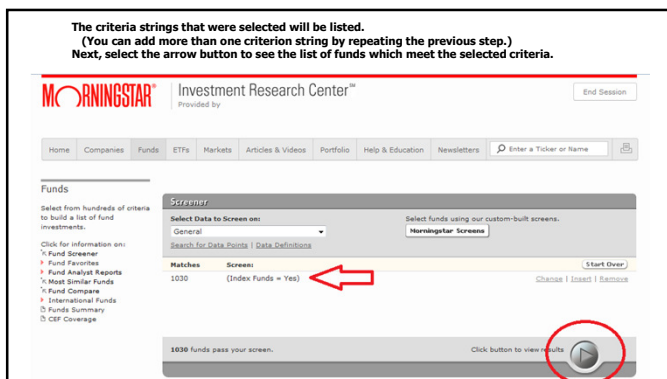
Enter two fund names in the field boxes & select view report.











[illegible][illegible]

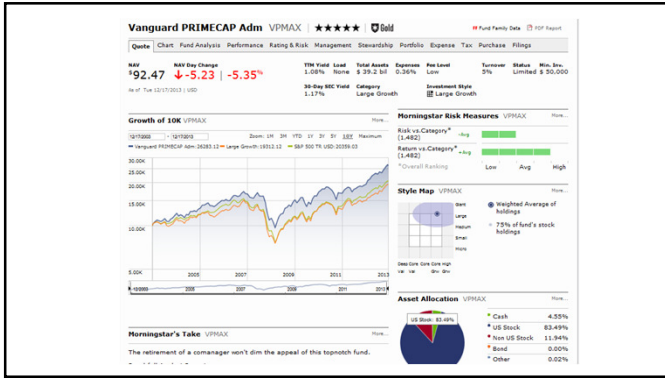
Another fund screening option is the custom-built screening tool.
 Select the **Morningstar Screens** button for a drop-down menu of criteria options & select an option & click open.
 On the next screen, select the arrow button to display the list of funds that meet the chosen criterion.

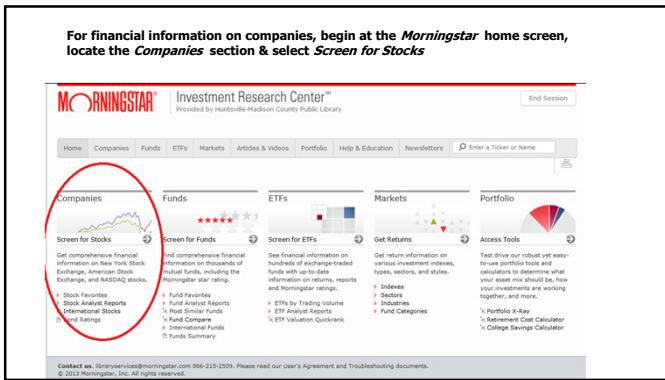
The screenshot shows the Morningstar website's fund screening interface. On the left, there's a sidebar with navigation links like 'Fund Research', 'Fund Favorites', 'Fund Analyst Reports', etc. The main content area is titled 'Screeners' and includes a 'Select Fund to Screen on:' dropdown menu. Below this, there's a 'Search for Data Points: 1 Data Definitions' section. A 'Matches: Screen:' section shows a list of criteria, with 'Morningstar Screens' selected. A red arrow points to the 'Morningstar Screens' button. Below the list, it says '22 Number of funds that pass your screen'. At the bottom right, there's a 'Click button to view results' button, which is circled in red. The footer contains contact information for Morningstar.

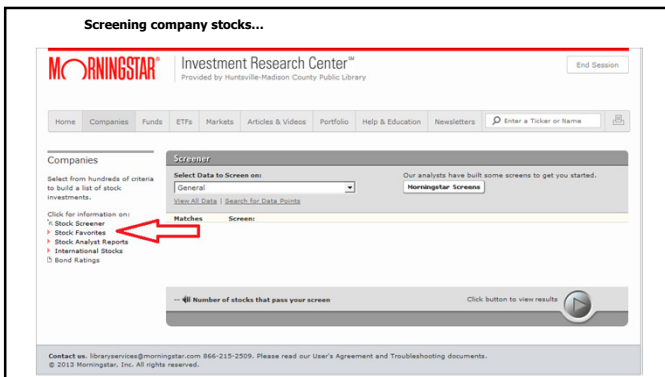
A results list will display. Next, navigate to the fund of your choice & select the fund link to retrieve the fund's performance details.

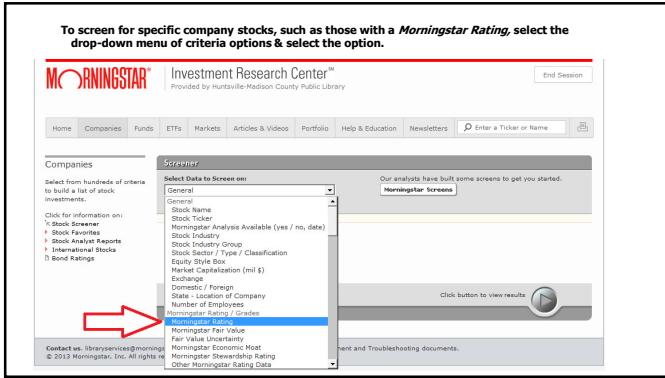
An additional fund screening option is the *Fund Favorites* tool.

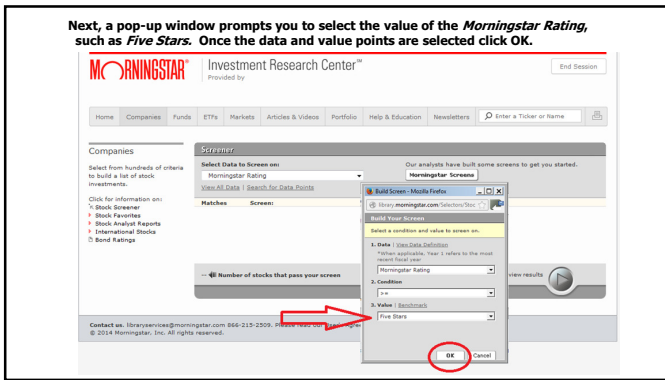
After selecting *Fund Favorites*, a list of Morningstar preferred mutual funds based on performance is displayed. Select any fund link to retrieve performance data on the funds.

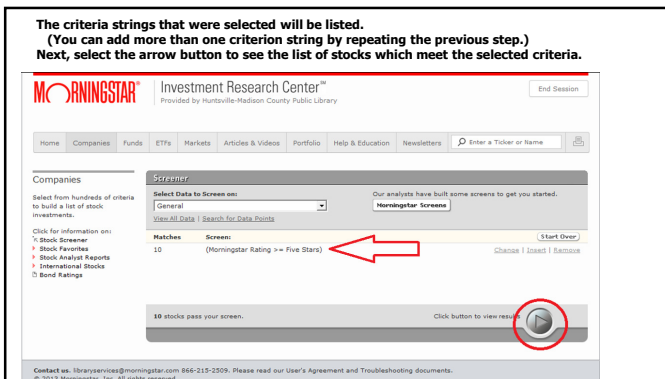














Investment Research Center™
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End Session

Home Companies Funds ETFs Markets Articles & Videos Portfolio Help & Education Newsletters

Companies

Selected from hundreds of returns to build a list of stock investments.

Click for information on:

- Stock Screeners
- Stock Features
- Stock Analyst Reports
- Stock Research
- Bond Ratings

Screen

View: Results: 1-15 out of 15

First Previous Next Last

Go to stock: Find a stock:

Tickers/Links

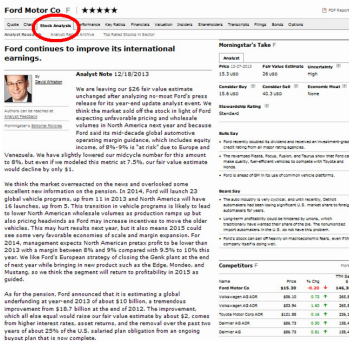
Check boxes to: ☐ Delete

<input type="checkbox"/> Stock Name	Historical Return Rank	Historical Volatility Rank	Sector	Industry	Market Cap	Dividends Yield
<input type="checkbox"/> Alumina Ltd.	10-21-13	★★★★	Basic Metals	Aluminum	2,473.47	0.00
<input type="checkbox"/> Barrick Gold Corp.	11-13-13	★★★★	Basic Metals	Gold	2,821	2.00
<input type="checkbox"/> Coca-Cola Bottling Co.	12-12-13	★★★★	Beverages	Soft & Sp. Integrated	71,354	3.32
<input type="checkbox"/> Enbridge Inc.	12-18-13	★★★★	Utilities	Utilities - Diversified	22,745	5.36
<input type="checkbox"/> East Group S.A.	12-12-13	★★★★	Consumer	Auto Manufacturers	9,765	0.00
<input type="checkbox"/> Ford Motor Co.	12-18-13	★★★★	Consumer	Auto Manufacturers	59,246	2.41
<input type="checkbox"/> General Elec.	12-12-13	★★★★	Electronics	Electronics	11,567	7.20
<input type="checkbox"/> GMEDS	11-27-13	★★★★	Common Stock	Telecom Services	32,341	3.74
<input type="checkbox"/> United Continental Holdings	11-21-13	★★★★	Airways	Oil & Gas E&P	3,321	0.00
<input type="checkbox"/> Vanguard Gold Inc.	10-21-13	★★★★	Basic Metals	Gold	4,562	1.16

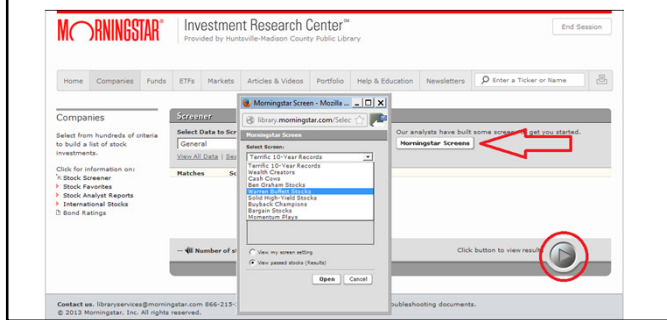
S&P 500

4.00

Click the button to change screening criteria.



Another stock screening option is the custom-built screening tool. Select the **Morningstar Screens** button for a drop-down menu of criteria options & select an option & click open. On the next screen, select the arrow button to display the resulting list of stocks.



A results list will display. Next, navigate to the company of your choice & select the link to retrieve the stock and company's performance details.

Companies

Select from hundreds of criteria to build a list of stock screeners.

Click for information on:

- Stock Browser
- Stock Favorites
- Stock Analyst Reports
- International Stocks

or Bond Ratings

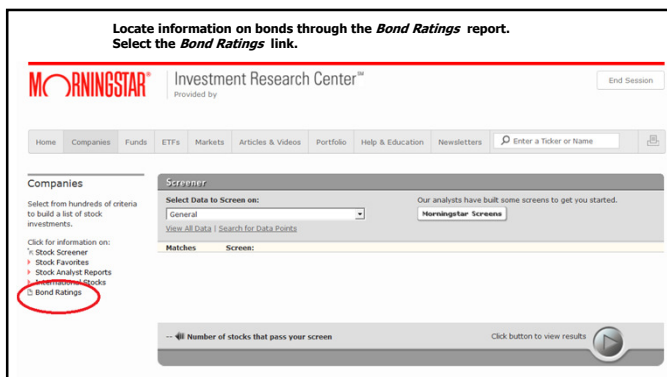
Screeners

Results: 129 out of 480
 First | Previous 25 | Next 25 | Last
 Go to stock # Find a stock
 (Go) (Go)

Check boxes for: (Checks)

Check boxes for:	Stock Name	Screening Date	Screening Status	Industry	Market Cap	Return on Equity
<input type="checkbox"/> All	12-17-13	***	Diversified Industrials	\$2,751	1.42	
<input type="checkbox"/> All	12-18-13	***	Diversified Industrials	\$2,727	2.71	
<input type="checkbox"/> All	12-18-13	***	Diversified Industrials	\$2,727	2.71	
<input type="checkbox"/> All	12-18-13	***	Medical Devices	\$2,727	1.46	
<input type="checkbox"/> All	12-18-13	***	Drug Manufacturers	\$2,727	3.04	
<input type="checkbox"/> All	12-18-13	***	Information Technology Services	\$2,727	2.11	
<input type="checkbox"/> All	12-18-13	***	Electronic Gaming & Multimedia	\$2,727	1.27	
<input type="checkbox"/> All	12-18-13	***	Health Care Plans	\$2,727	1.17	
<input type="checkbox"/> All	12-18-13	***	Diagnoses & Research	\$2,727	0.46	
<input type="checkbox"/> All	12-18-13	***	Chemicals	\$2,727	3.39	
<input type="checkbox"/> All	12-18-13	***	Chemicals	\$2,727	2.44	
<input type="checkbox"/> All	12-18-13	***	Chemicals	\$2,727	1.45	
<input type="checkbox"/> All	12-18-13	***	Biotechnology	\$2,727	0.00	
<input type="checkbox"/> All	12-18-13	***	Healthcare	\$2,727	0.18	
<input type="checkbox"/> All	12-18-13	***	Specialty & General	\$2,727	0.80	
<input type="checkbox"/> All	12-18-13	***	Business Services	\$2,727	5.93	
<input type="checkbox"/> All	12-18-13	***	Semiconductors	\$2,727	1.94	
<input type="checkbox"/> All	12-18-13	***	Consumer Def Tobacco	\$2,727	4.40	
<input type="checkbox"/> All	12-18-13	***	Consumer Def Beverages - Brewers	\$2,727	1.42	
<input type="checkbox"/> All	12-18-13	***	Packaging & Containers	\$2,727	3.17	

Locate information on bonds through the **Bond Ratings** report. Select the **Bond Ratings** link.



Note the Morningstar Credit Ratings for each bond as outlined in the red box.

Morningstar Corporate Credit Ratings

Company Name	Ticker	Morningstar Credit Rating	Sector	Short Star Rating	Economic Mod.
3M Company	MMM	AA	Industrial Materials	★★★★	Wld
ABB Ltd	ABB	A	Industrial Materials	★★★	None
Abbott Laboratories	ABB	AA	Health Care	★★★★	Wld
Accent Corporation	ATI	BB	Industrial Materials	★★★★	None
ACC Telecommunications, Inc.	ADCT	BB	Telecommunications	★★★	None
Advanced Micro Devices	AMD	BB+	Hardware	★★★	None
Affiliated Managers Group, Inc.	AMG	BB	Financial Services	★★★	None
Alkermes, Inc.	ALK	BB	Health Care	★★★	None
Alcoa Corporation	AAO	BB+	Industrial Materials	★★★	None
Alkermes and Chemicals, Inc.	APC	A	Industrial Materials	★★★	None
Allegis, Inc.	ALG	BB	Industrial Materials	★	None
Alcoa Inc.	AA	BB+	Industrial Materials	★★★★	None
Alkermes Pharmaceuticals, Inc.	ALXN	BB+	Health Care	★★★	None
Alkermes Technologies, Inc.	ATX	BB	Industrial Materials	★★★★	None
Alkermes Research Inc (Banc)	ARK	BB	Industrial Materials	★★★	None
Alkermes Inc.	ML	BB	Consumer Goods	★★★	Wld
American Electric Power	AEP	BB+	Utilities	★★	None
American Express Company	AEX	A	Financial Services	★★★	Wld

Begin at the Morningstar home screen and locate either of the two *Portfolio* portals.

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• Portfolio X-Ray
• Retirement Cost Calculator
• College Savings Calculator

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Once at the *Portfolio* home screen, select the *X-Ray* tool which will assess the risk of the portfolio.

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Portfolio **X-Ray** **Asset Allocation** **Investment Goals** **Calculators**

X-Ray
Input an actual or hypothetical portfolio and X-Ray how its securities are working together. Find out how risky the portfolio is, what areas of the market it's exposed to, and more!

Asset Allocation
Learn more about various asset classes:
• Bonds
• International Investing
• Large vs Small
• Growth vs Value

Investment Goals
Know what you're investing for but not sure how to do it?
Learn the ins and outs of goal-based investing by reading our Goal Primers:
• 30 Days to Financial Fitness
• Retirement Planning
• The Morningstar Baby Boomer Retirement Guide
• The Morningstar Echo Boomer Retirement Guide
• The Morningstar Grand Generation Retirement Guide
• Investing During Retirement
• College Planning

Calculators
Use our calculators to determine how much you need to save for retirement and college funding.
• Retirement Savings
• College Savings
• 529 College Savings Plan Ratings

X-Ray a Portfolio

How to Create a Portfolio
You Don't Have to Baby-sit
By Christine Benz

Rebalancing Your Portfolio
By Christine Benz

Investing 101
By Jeremy Greer

Once the *Portfolio X-Ray* tool has loaded, you can enter the type of security & its % of the portfolio. Next, select the *Show Instant X-Ray* button to view the portfolio's risk assessment.

Another feature is the option to register for the free portfolio performance tracking account. Locate the link above the red arrow to go to Morningstar's registration webpage.

Instant X-Ray

Enter Holdings Instant X-Ray

Welcome to Instant X-Ray

Report your portfolio's strengths and weaknesses.

At a glance, understand the basic characteristics of your portfolio including its asset allocation, exposure to different investment styles, geographic regions, and sectors. Plus, easily analyze how well your holdings and expenses are adding up to meet your financial goals.

To create a portfolio that you can save and whose returns you can track over time, become a free registered member of our sister site, Morningstar.com. Click [here](#) to go to the Morningstar.com registration page. To add cash holdings please add CASH.

Ticker Symbol

Percentage Value %

Holding Value

Shortlist Equal Allocation

Portfolio must equal 100%

0

+ Add more entry fields

Show Instant X-Ray

Reset

For info. about building a portfolio and rebalancing a portfolio, check out the *Asset Allocation* section. For info. about financial fitness & setting retirement investment goals, check out the *Investment Goals* section.

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Portfolio X-Ray Asset Allocation Investment Goals Calculators

A comprehensive suite of portfolio-planning tools and guidance for new and experienced investors alike.

Input an actual or hypothetical portfolio and X-Ray how its securities are working together.

Find out how risky the portfolio is, what areas of the market it's exposed to, and more!

X-Ray a Portfolio

Learn more about various asset classes:

- Bonds
- International Investing
- Large vs. Small
- Growth vs. Value

Investing Well at Every Life Stage
By Christine Benz, Adam Zoll

How to Create a Portfolio You Don't Have to Baby-sit
By Christine Benz

Rebalancing Your Portfolio
By Christine Benz

Investing 101
By Jeremy Glaser

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- Retirement Planning
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- The Morningstar Baby Boomer Retirement Guide
- The Morningstar Grand Generation Retirement Guide
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- College Planning

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- Quick Guide

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- ETFs
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- Bond Curriculum

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- The Star Rating for Funds
- The Rating for Stocks
- The Rating for ETFs
- The Rating for Bonds



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