

Morningstar Investment Research Center

An Online Resource for your financial portfolio

Morningstar Investment Research Center provides information on more than 20,000 stocks and mutual funds. With it, users have the ability to build and analyze their investment portfolios.

Accessing Morningstar Investment Research Center

1. Go to the Deschutes Public Library web page at <http://www.deschuteslibrary.org>
2. Click once on **Explore**.
3. Click once on **Online Resources**.
4. Click once on **Morningstar Investment Research Center** under Business and Investment.
5. Click once on **Visit Morningstar Investment Research Center**.
6. Type in your 14-digit library card number and click **Connect**.

Getting Help with Morningstar Investment Research Center

Help is always available online when using *Morningstar Investment Research Center*. To access, click once on **Help & Education** at the top of the screen. Select either the *User's Guide* or *Quick Guide* for information about using the site. Note that this area also provides investing articles, electronic investment classes, and a glossary of investment terms used throughout the site.

Searching for Stock, Fund, and ETF (Exchange Traded Fund) Reports

- From the main screen enter a ticker symbol or stock or mutual fund name in the box on the upper left of the screen and click **Get Report**. Note that as you begin typing, suggestions for selection will pop up.
- A most recent quote is displayed.
- Click on any of the menu choices to the left of the screen for additional figures and analyses.

Using the Screeners

Search for stocks, funds, and ETFs that fit your personal interests and financial needs using the *Morningstar Screeners*. To access, click on the **Screen** link beneath the images for **Companies**, **Funds**, or **ETFs** on the main page. Select from predetermined screeners using the drop-down menus. Click the arrow button at the bottom of the screen to view results.

Adult Services

(541) 617-7080
www.deschuteslibrary.org



Viewing Market Information

Get return information on various investment indexes and groups by clicking on the image for **Markets**. Click on any index, sector, or style to see how those areas are performing.

Using the Portfolio X-Ray

Allows you to view your investment portfolio in a variety of ways and then make decisions about adding, dropping, or reallocating investments. To access, click on the **Portfolio** tab and then **X-Ray a Portfolio**. Enter the ticker symbols for stocks and funds, then select the dollar amount or percentage of total investments for each. Click on **View your Portfolio X-Ray** to view a report on selected investments.

Printing Results

- Display the portion of the report you wish to print.
- Click on **Print** or **Formatted Report** at the bottom of the left-hand menu. A new window opens displaying the report.
- In the new window, click on the **Print** icon.
- Click **Print** or **OK**.



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