

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>)

Click: **Research Tools**

Click: **Business and Investments**

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.**
 - Type 'american century' in the search box under the *Reports* column.
 - Click the *Go* button. This will generate an alphabetical list of the company's 200+ stock and bond funds with ticker symbols (not necessarily alphabetical) to the left.
 - Click any one of these 200+ tickers to bring up its individual (called *Snapshot*) page with additional links on the left for more detailed information such as *Analyst Research, Morningstar Rating, Total Returns, Risk Measures, etc.*
 - To see a list of other mutual funds grouped in this same fund family, click *Fund Family Data* at the top of the *Snapshot* page.

2. **I need financial statements for Walgreen's, the pharmacy chain.**
 - Type 'walgreen' (not 'walgreen's) in the search box under *Reports*.
 - Click the *Go* button. The name *Walgreen* and its ticker symbol will appear.
 - Click the 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".**
 - Click the *Go* button for the *Screeners* option.
 - When the *Screeners* page 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 funds will be generated, each one clickable for greater detail.

4. **A patron considers herself “socially responsible” and wants to invest in funds that reflect her values. Can Morningstar Help?**
- Click the *Screeners* option.
 - In the *Select Data to Screen On* box use the drop down menu to select *Special Fund Types* (under the *General* grouping).
 - In the *Build Your Screen* box which appears, select *Socially Conscious Funds* from the *Data* (no.1) *setting*, leave the *Condition* (no. 2) setting at *Equal (=)*, and select *Yes* for the *Value* (no. 3) setting. Click the *OK* button.
 - This search will return matches for *Socially Conscious Funds =Yes*. Click the large round button (bottom right) to retrieve the list.
 - The alphabetical list of clickable names will be displayed in groups of 25. The screens (groups) are advanced by clicking the *Next* button at the top.
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 under *Reports*.
 - Click the *Go* button.
 - From the results list, click the ticker symbol (*AMZN*) next to *Amazon.com*. The resulting *Quote* page will automatically open. This displays basic information about the company.
 - From the options on the left side of the page, click *SEC Filings*.
 - A summarized list of annual, quarterly, and periodic reports will appear. Clicking the link for *10K (Annual Report)* will take the searcher to the Securities and Exchange Commission's web site where *Amazon.com's* annual reports from 1998 through 2007 are displayed.
6. **I want to see a list of funds recommended by Morningstar as well as a list not recommended by Morningstar, i.e., ones to avoid.**
- Click *Screeners*.
 - Under *Select Data to Screen*, select *Analyst Pick/Pan* (under the *General* group).
 - In the resulting *Build Your Screen* box, leave *Data* set at *Analyst Pick/Pan* and *Condition* set at the equal (=) sign. For *Value*, select *Pick* from the drop down menu, and click *OK*.
 - The *Build Your Screen* box will disappear, and the *Screeners* page will reveal the number of matches found. Clicking the large round *View Results* button will list them alphabetically.
 - For a list of funds not recommended, repeat this process, but select *Pan* instead of *Pick* in the *Value* box.
7. **Can Morningstar teach me how to invest? It all seems rather complicated.**
- Click the *Help and Education* link at the top (a one-stop shop for investment learning). A glossary and downloadable seminars on a variety of investing topics are available.