

Morningstar Investment Research Center

Quick Guide

The screenshot shows the Morningstar website navigation and main content areas. Callouts are as follows:

- A:** Points to the "Help & Education" tab in the top navigation bar.
- B:** Points to the "Get Report" button next to the "Enter a Ticker or Name" search field.
- C:** Points to the "Screen for Stocks", "Screen for Funds", and "Screen for ETFs" buttons in the main content area.
- D:** Points to the "Stock Recommendations" and "Fund Recommendations" links in the left sidebar.
- E:** Points to the "Stock Analyst Reports" and "Fund Analyst Reports" links in the left sidebar.
- F:** Points to the "Indexes", "Sectors", "Industries", and "Fund Categories" links in the right sidebar.
- G:** Points to the "Get Portfolio Analysis" button in the Portfolio X-Ray section.

A. Click the tab to learn more about investing and how to stay ahead of the market.

B. Enter a Ticker or Name and go directly to the report. You will be provided with detailed analyst guidance on 1,900 stocks, 2,100 funds, and more than 150 ETFs.

C. Click buttons to screen for Stocks, Funds, or ETFs. You can use your own criteria to create short lists of stocks, funds and ETFs for further research.

D. Click links to go to a list of Fund or Stock Recommendations.

E. Click links to go to a list of Fund or Stock Analyst Reports.

F. Click the link of your choice to get return information on indexes, industries, sectors or fund categories.

Also download PDF reports on sectors located in the left column of any Industry page.

G. Click the Portfolio X-Ray button to get access to the tool. You can use this tool to assemble your picks and the stocks, funds, and ETFs you own into a portfolio. You can check your asset allocation, sector weightings, and more.