

# Morningstar

Get comprehensive financial information on stocks, mutual funds, exchange-traded funds, indexes, and market sectors

## *Use Morningstar to:*

- Sort through thousands of stocks and funds using your own criteria
- Select from hundreds of criteria to build an investment portfolio
- Access expert proprietary analysis on stocks, funds, and exchange-traded-funds (ETFs)
- Use portfolio planning tools and guidance for novice and experienced investors
- Calculate your needed savings for retirement or college funding
- Download monthly newsletters from mutual fund, stock, and ETF strategists
- Sharpen your investment skills—or pick up new ones—using the investing classroom

## *To connect to Morningstar:*

1. Go to <http://www.knoxlib.org>
  2. Search “morningstar” in the search box.
- Find more resources in the subject guides:  
**Explore the collection → Subject guides → Business and investing → Investing**

## *Database tips:*

1. Use the “*Screen for*” links under the *Companies*, *Funds*, and *ETFs* sections to choose selection criteria.
  - Build or modify your screener by using *Change*, *Insert*, or *Remove*.
  - The number of investments that meet your criteria show below the screener tool; click the arrow button to view your results.
  - From the screener start page, select *Morningstar Screens* for lists by pre-defined criteria that you can tweak.
2. Use the “*Stock Favorites*” link to screen for stocks with 5-star Morningstar ratings. “*Fund Favorites*” provides a list of gold-rated funds.
3. When viewing an individual stock or fund, use the tabs to access charts, analysis, key ratios, and other data. The PDF report link in the upper right corner for a 1-page summary report to print or save.
4. Select the *Help & Education* link to access free webinars, database user guides and tutorials, short interactive courses on investment topics, a glossary of investment terms, and more.
5. Choose *Markets* to find index, sector, industry, and fund category returns and to download quarterly industry reports and sector reports.
6. Use the *Portfolio* section for planning tools and investment guidance. *X-ray* analyzes your portfolio for risk and market exposure.