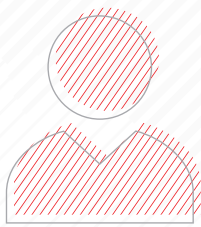
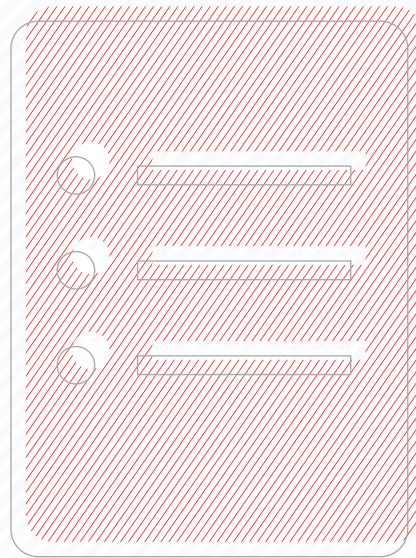
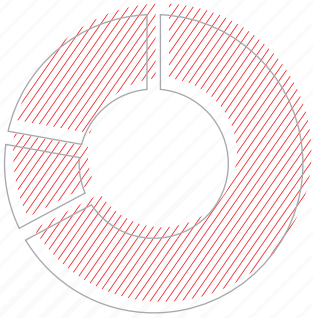
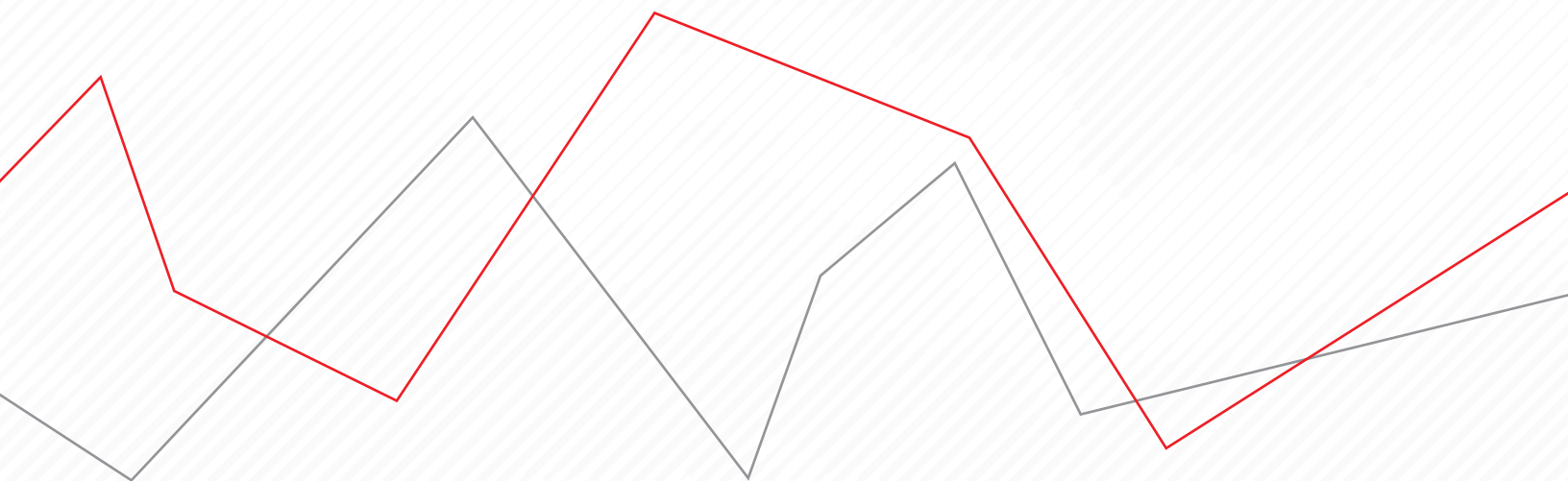


Creating Screens

Exercise Guide



MORNINGSTAR Office



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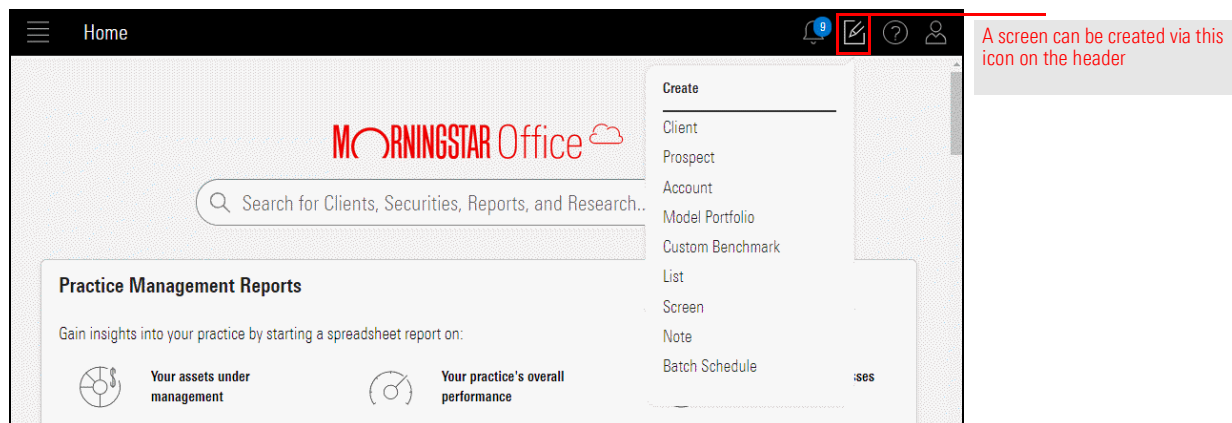
Screening for Investments in Morningstar OfficeSM Cloud

By now, you should have completed the [Creating Lists](#) manual, where you learned how to save a static set of investments as a list. In this manual, you will learn how to create a screen. A screen allows you to define the criteria investments must meet to be seen in a grid.

Unlike a list, whose members never change unless you manually add or remove them, a screen is dynamic. That is, it always reflects the investments which currently match the criteria you have defined. For example, you create a screen in February to find undervalued stocks and it returns 140 stocks, but when you open it in March it could result in just 90 stocks being found, or as many as 150.

This guide provides practice in creating several different screens, and you will also learn new capabilities related to analytical views and working with the Grid.

Overview



Creating and Saving Screens for Stocks

The same basic process is used for each screen you create:

1. Select an **investment type** (for example, stocks, funds) as the basis for the screen.
2. Choose a **data point** related to those investment types to search for.
3. Determine acceptable **values** for that data point.
4. Click **OK** to accept the data point and its value.
5. **Repeat steps 2-4** until all data points and criteria have been entered.
6. Click **Done** to close the Screener window and see the results in a workbook.

Overview

This section provides practice in not only creating a screen, but also the following:

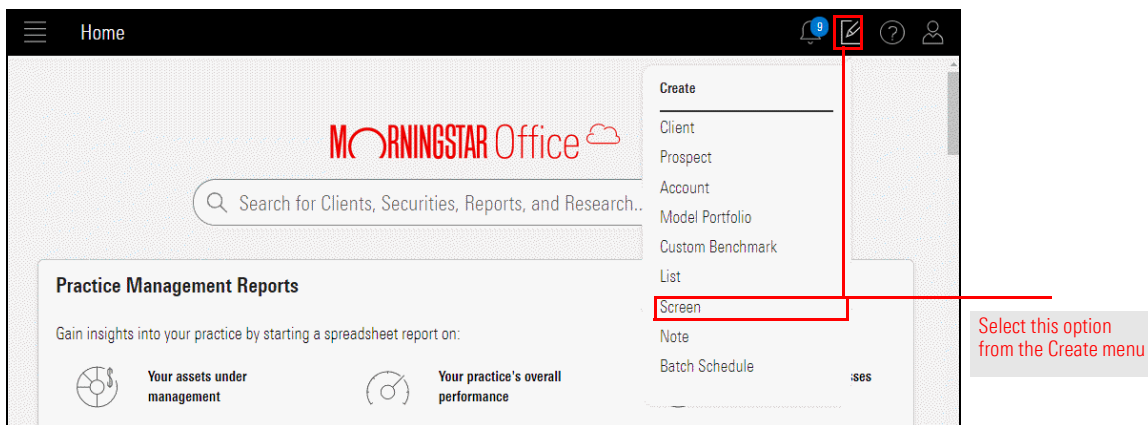
- ▶ changing the data set associated with a screen’s results
- ▶ saving a screen
- ▶ modifying a screen
- ▶ changing the settings for a data point
- ▶ saving a modified screen with a new name, and
- ▶ saving a workbook.

Stocks assigned a 5-star rating are those that Morningstar’s Analysts believe are the most deeply undervalued. Because the Morningstar Rating for Stocks is updated everyday, creating and saving a screen to track 5-star stocks is helpful. Doing so allows you to open this screen each day to see which new stocks are now in 5-star territory, and thus discover new investment opportunities.

Exercise 1: Screen for 5-star stocks

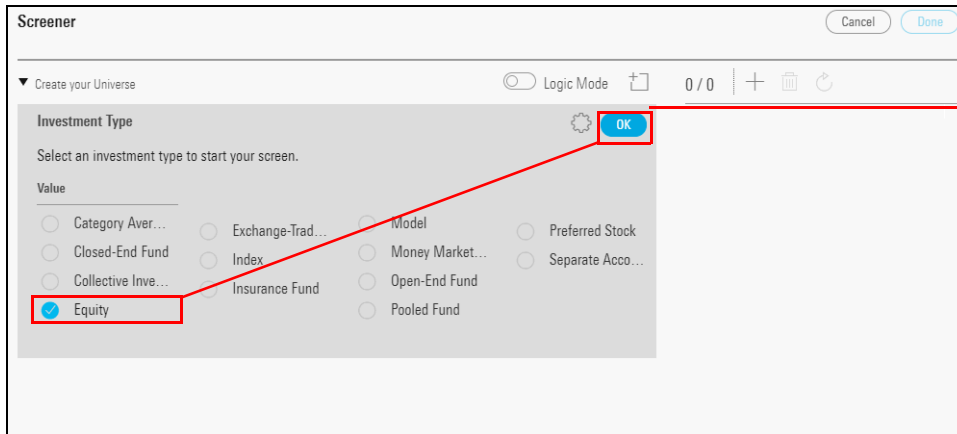
As with a list, a screen can be created from anywhere in Morningstar OfficeSM Cloud by clicking the Create icon on the header. To find 5-star stocks traded in the U.S., do the following:

1. On the header, click the **Create** icon, then select **Screen**. The Screener window opens.



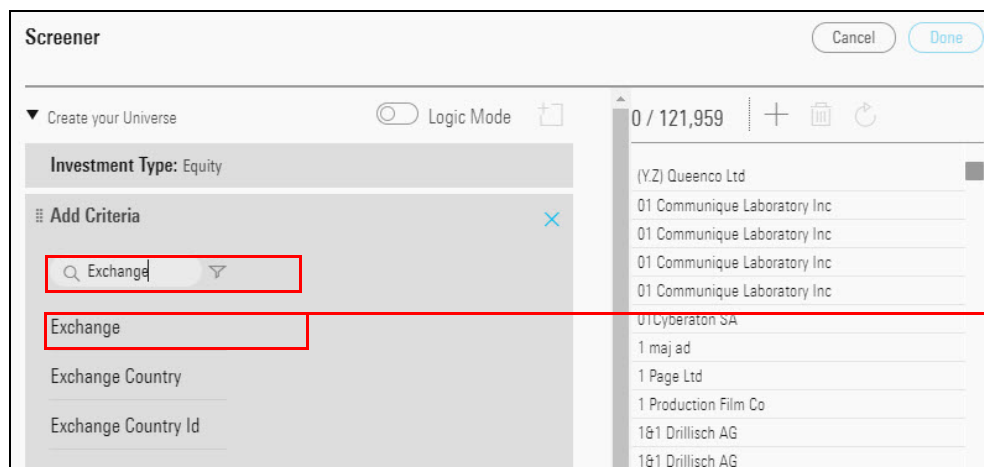
2. Select the option for **Equity**.

- Click **OK**. As you make selections, all investments matching the criteria appear in the Screener window's left-hand pane.



Although only Equity is selected here, you can choose multiple investment types when creating a screen

- The system shows every instance of a stock, including every exchange it trades on; which results in some stocks appearing on the list more than once. To address this, narrow the results by adding more search criteria. In the Add Criteria area, in the **Search for data points** field, type **Exchange**, then select the **Exchange** data point when it appears.



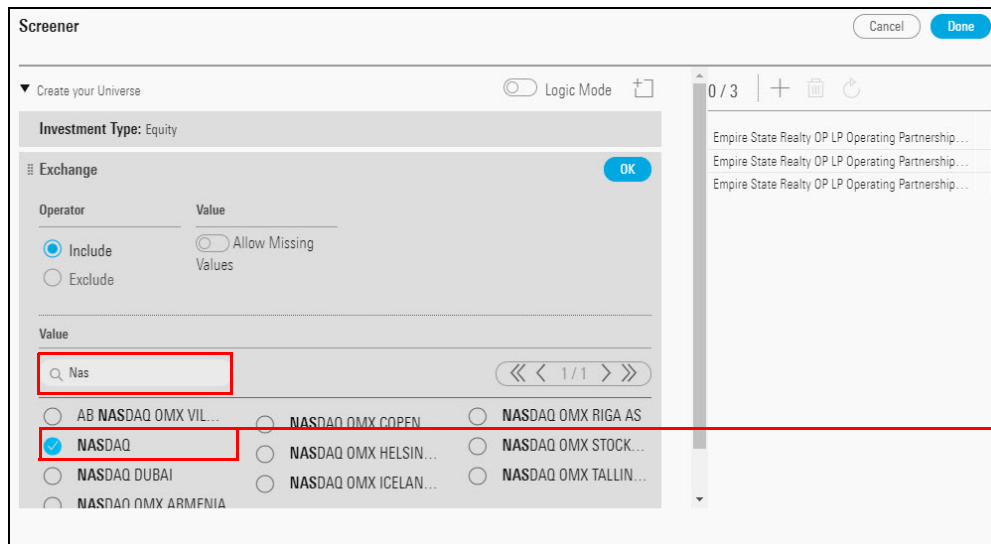
Click Exchange after searching for it.

- In the Value area, search for **NYSE ARCA**, then click to select its option.



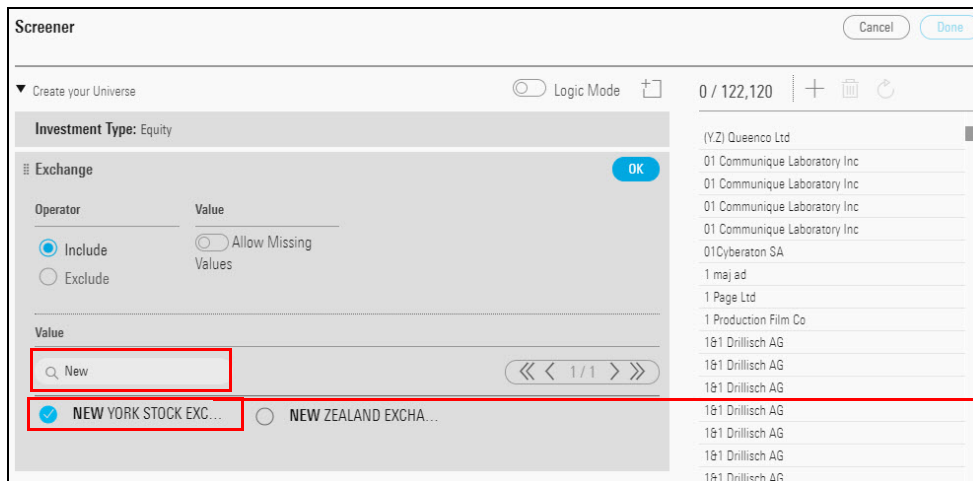
Click NYSE ARCA after searching for it

- Clear the **Filter** field, then enter **NASDAQ** and click it to select its option.



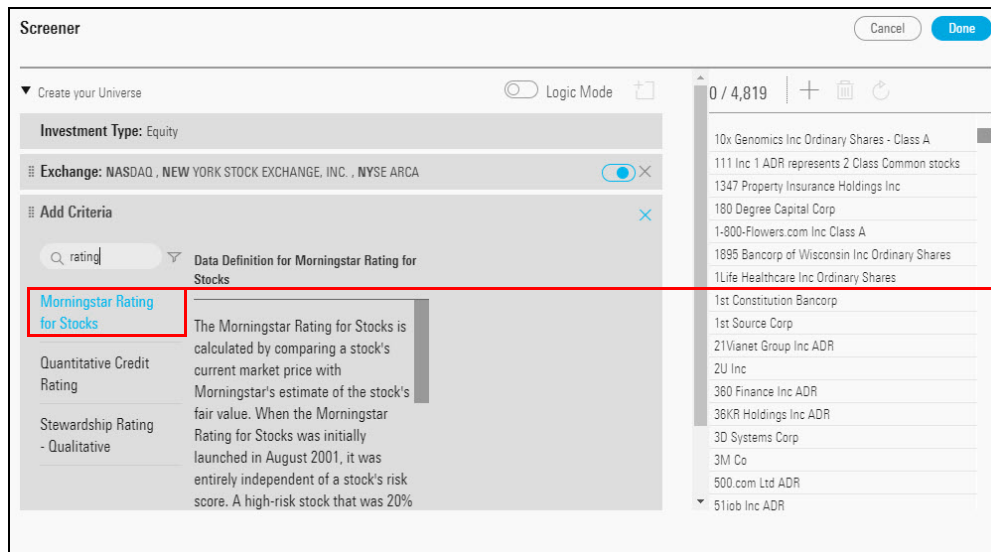
Select this exchange after searching for it

- Clear the **Filter** field, then enter **New York** and click **New York Stock Exchange, Inc.** to select its option.



Select this exchange after searching for it

- Click **OK**. Note that the number of matching stocks shrinks considerably.
- To find stocks with a 5-star rating, in the Add Criteria area, in the **Search for data points** field, type **Rating**, then select **Morningstar Rating for Stocks**.



Select this data point after searching for it

- Select the option for ★★★★★.

11. Click **OK**.

12. Click **Done**. The Screener window closes, and the Grid opens.

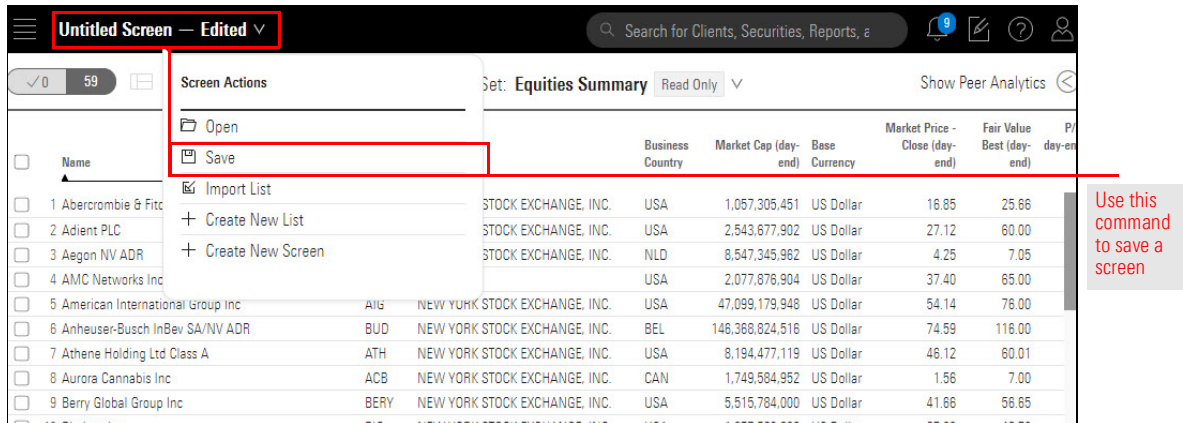
A screen is not automatically saved when you create it. In the upper-left corner of the window, note the name of the screen. The word Edited indicates that the screen has not been saved.

Exercise 2: Save the screen you created

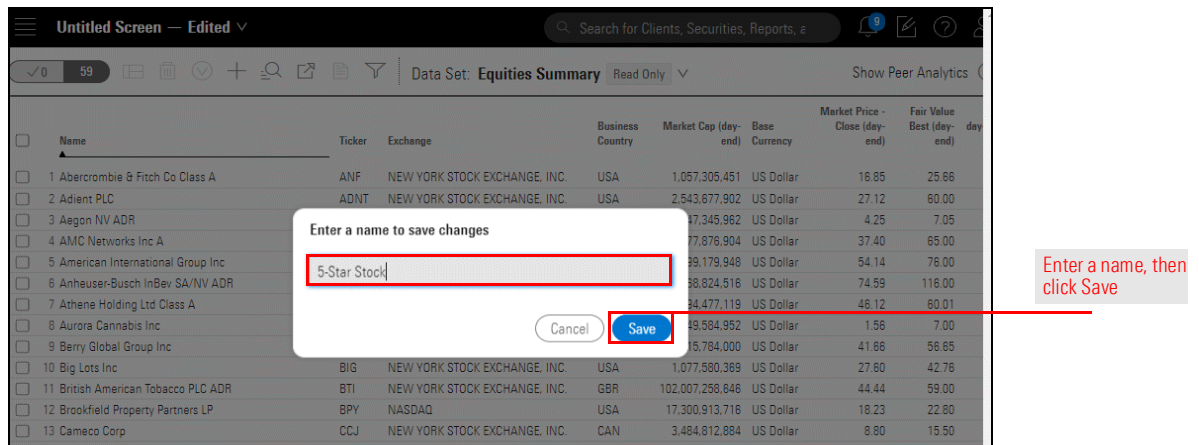
Name	Ticker	Exchange	Business Country	Market Cap (day-end)	Base Currency	Market Price - Close (day-end)	Fair Value Best (day-end)	P/E
1 Abercrombie & Fitch Co Class A	ANF	NEW YORK STOCK EXCHANGE, INC.	USA	1,057,305,451	US Dollar	18.85	25.68	
2 Adient PLC	ADNT	NEW YORK STOCK EXCHANGE, INC.	USA	2,543,677,902	US Dollar	27.12	60.00	
3 Aegon NV ADR	AEG	NEW YORK STOCK EXCHANGE, INC.	NLD	8,547,345,982	US Dollar	4.25	7.05	
4 AMC Networks Inc A	AMCX	NASDAQ	USA	2,077,878,904	US Dollar	37.40	65.00	
5 American International Group Inc	AIG	NEW YORK STOCK EXCHANGE, INC.	USA	47,099,179,948	US Dollar	54.14	76.00	
6 Anheuser-Busch InBev SA/NV ADR	BUD	NEW YORK STOCK EXCHANGE, INC.	BEL	148,388,824,516	US Dollar	74.59	116.00	
7 Athene Holding Ltd Class A	ATH	NEW YORK STOCK EXCHANGE, INC.	USA	8,194,477,119	US Dollar	46.12	60.01	
8 Aurora Cannabis Inc	ACB	NEW YORK STOCK EXCHANGE, INC.	CAN	1,749,584,952	US Dollar	1.56	7.00	
9 Barry Global Group Inc	BERY	NEW YORK STOCK EXCHANGE, INC.	USA	5,515,784,000	US Dollar	41.66	58.65	
10 Big Lots Inc	BIG	NEW YORK STOCK EXCHANGE, INC.	USA	1,077,580,369	US Dollar	27.60	42.76	
11 British American Tobacco PLC ADR	BTI	NEW YORK STOCK EXCHANGE, INC.	GBR	102,007,258,846	US Dollar	44.44	59.00	
12 Brookfield Property Partners LP	BPY	NASDAQ	USA	17,300,913,716	US Dollar	18.23	22.80	

Once saved, the screens you create in Morningstar Office Cloud are dynamic; that is, when you open a screen, it always shows the securities matching the criteria associated with the screen. This allows you to always see the current results of a saved screen you open on a regular basis. To save the screen you created, do the following:

1. On the toolbar above the grid, click the **Lists & Screens** drop-down field, then select **Save**. A dialog box opens.



2. In the **Enter new name** field, type **5-Star Stocks**.
3. Click **Save**. The dialog box closes, and the name of the screen now appears in the field on the toolbar.



Before moving on to creating a screen for funds, one additional exercise on screening for stocks will prove instructive. This exercise allows you to practice the following skills:

Exercise 3: Screen for stocks by P/E Ratio

- ▶ changing an existing screen
- ▶ screening for stocks with a Price-to-Earnings Ratio greater than 20
- ▶ saving a new screen without changing an existing saved screen, and
- ▶ saving a workbook to preserve a custom sort.

Do the following:

1. From the Grid header row, click the **Open Screener** icon. The Screener window opens.

Name	Ticker	Exchange	Business Country	Market Cap (day-end)	Base Currency	Market Price - Close (day-end)	Fair Value Best (day-end)	P/E (day-end)
1 Abercrombie & Fitch Co Class A	ANF	NEW YORK STOCK EXCHANGE, INC.	USA	1,057,305,451	US Dollar	18.85	25.66	
2 Adient PLC	ADNT	NEW YORK STOCK EXCHANGE, INC.	USA	2,543,677,902	US Dollar	27.12	60.00	
3 Aegon NV ADR	AEG	NEW YORK STOCK EXCHANGE, INC.	NLD	8,547,345,962	US Dollar	4.25	7.05	
4 AMC Networks Inc A	AMCK	NASDAQ	USA	2,077,676,904	US Dollar	37.40	65.00	
5 American International Group Inc	AIG	NEW YORK STOCK EXCHANGE, INC.	USA	47,099,179,948	US Dollar	54.14	76.00	
6 Anheuser-Busch InBev SA/NV ADR	BUD	NEW YORK STOCK EXCHANGE, INC.	BEL	146,368,824,516	US Dollar	74.59	116.00	
7 Athene Holding Ltd Class A	ATH	NEW YORK STOCK EXCHANGE, INC.	USA	8,194,477,119	US Dollar	46.12	60.01	
8 Aurora Cannabis Inc	ACB	NEW YORK STOCK EXCHANGE, INC.	CAN	1,749,584,952	US Dollar	1.56	7.00	
9 Berry Global Group Inc	BERY	NEW YORK STOCK EXCHANGE, INC.	USA	5,515,784,000	US Dollar	41.66	58.65	
10 Big Lots Inc	BIG	NEW YORK STOCK EXCHANGE, INC.	USA	1,077,580,369	US Dollar	27.60	42.78	
11 British American Tobacco PLC ADR	BTI	NEW YORK STOCK EXCHANGE, INC.	GBR	102,007,258,846	US Dollar	44.44	59.00	
12 Brookfield Property Partners LP	BPV	NASDAQ	USA	17,300,913,716	US Dollar	18.23	22.80	

2. To the right of the Morningstar Rating criterion, click the **X** to remove it.

Screener [Cancel] [Done]

▼ Create your Universe Logic Mode 0 / 107

Investment Type: Equity

Exchange: NASDAQ, NEW YORK STOCK EXCHANGE, INC., NYSE ARCA [X]

Morningstar Rating for Stocks Best (mo-end): Include Value: 5 Stars [X]

Add Criteria [X]

Search for

Average Price Ratio

Business Country

Cost of Equity

Distribution >

Acadia Healthcare Co Inc

Adient PLC

Aegon NV ADR

AMC Networks Inc A

American International Group Inc

Anheuser-Busch InBev SA/NV ADR

Aphria Inc

Aramark

Baker Hughes Co Class A

Banco Santander SA ADR

BorgWarner Inc

BP PLC ADR

Capri Holdings Ltd

CF Industries Holdings Inc

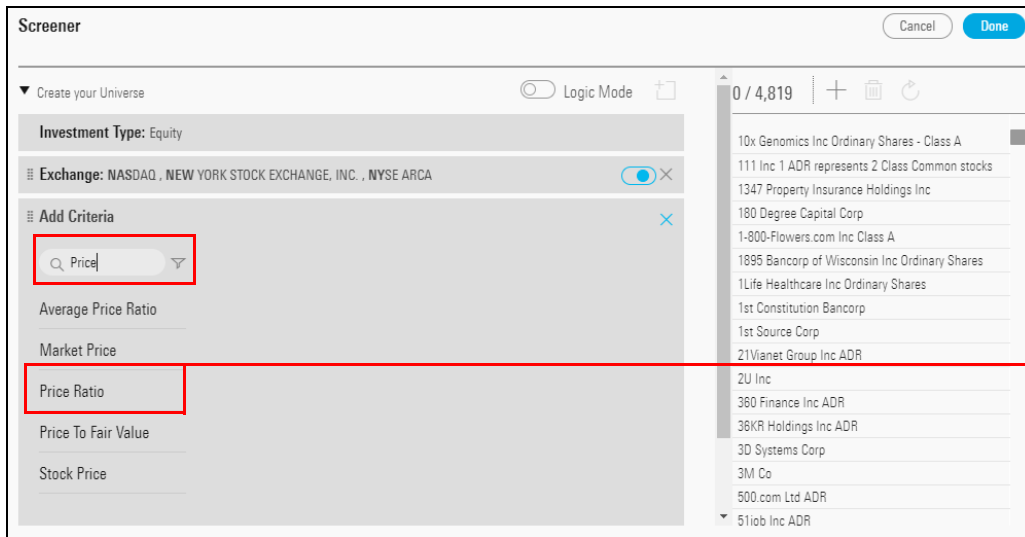
China Life Insurance Co Ltd ADR repr Class H

China Mobile Ltd ADR

China Telecom Corp Ltd ADR

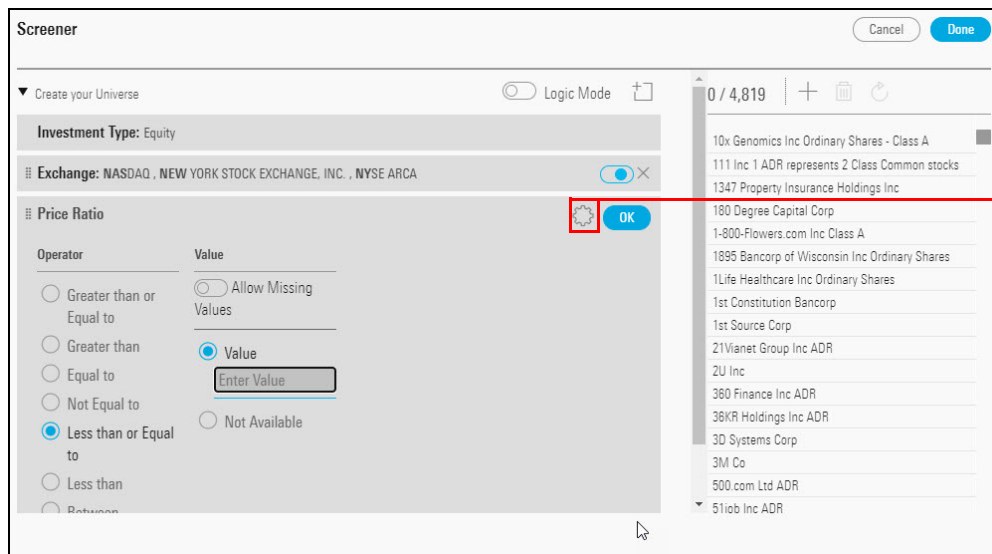
3. In the Add Criteria area **Search for data points** field, type **P/E**. Note that no results are shown.

- In the Search for data points field, type **Price**, then click **Price Ratio**.



Note the term to search for, and the item to select

- The system defaults to the P/B Price Ratio (Price-to-Book). To change this to the P/E Price Ratio, click the **Settings** icon.



Click this icon to change the settings for this data point

- From the **Valuation per Share Type** drop-down field, select **P/E**.

The screenshot shows the 'Screener' window with the following settings:

- Investment Type: Equity
- Exchange: NASDAQ, NEW YORK STOCK EXCHANGE, INC., NYSE ARCA
- Price Ratio: P/E (selected in dropdown)
- Screen By: Value

A red box highlights the 'P/E' option in the dropdown menu. A red line points from this box to a callout box on the right that says "Select this option from this field".

- Click **OK**.
- From the Operator column, select **Greater than**.
- In the **Value** field, enter **20**.

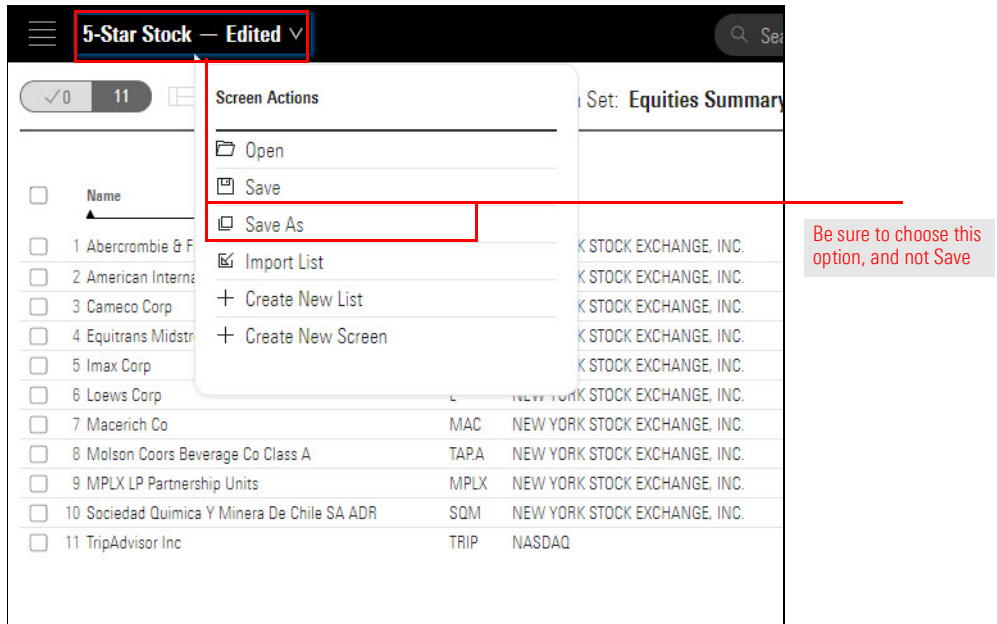
The screenshot shows the 'Screener' window with the following settings:

- Investment Type: Equity
- Exchange: NASDAQ, NEW YORK STOCK EXCHANGE, INC., NYSE ARCA
- Price Ratio: P/E Ratio day-end (day-end)
- Operator: Greater than (selected)
- Value: 20

A red box highlights the 'Greater than' radio button and the '20' value in the 'Value' field. A red line points from this box to a callout box on the right that says "Note the selections for these fields".

- Click **OK**.
- Click **Done**. The Screener window closes, and the Grid is displayed.

- Note the word Edited to the right of the screen's name; this indicates the saved screen has changed. To save this screen with a new name, click the drop-down field and select **Save As**.



- In the **Enter a new screen name** field, enter **Growth Stock**, then click **Save**. The name of the screen changes automatically.

Creating and Saving Screens for Funds

The process of creating and saving screens for funds is identical to that for stocks. The only difference is the set of data points available for screening. In addition to practicing building additional screens, the exercises in this section also show you how to do the following:

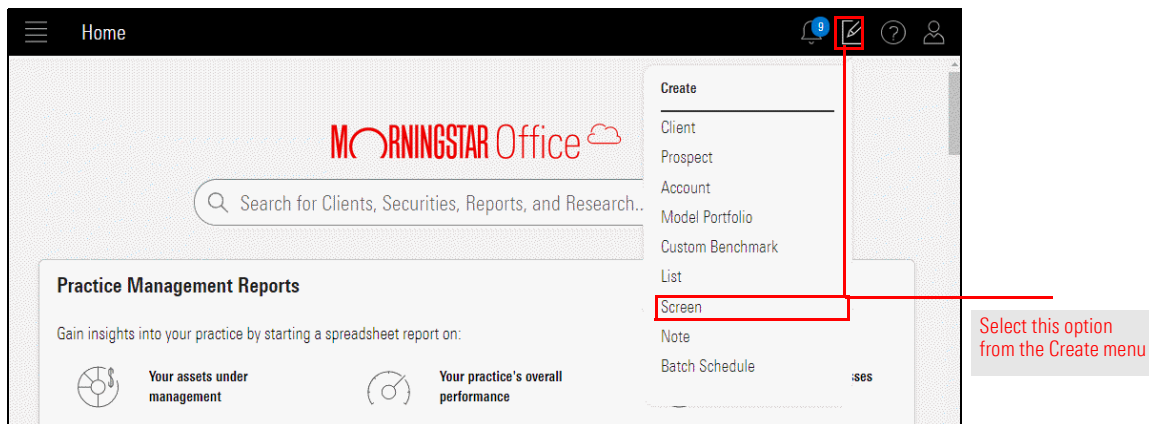
- ▶ save investments from a screen to a list
- ▶ group funds by category in the Grid
- ▶ change a screen’s name, and
- ▶ find a data point if it does not automatically appear when searching for it by name.

Overview

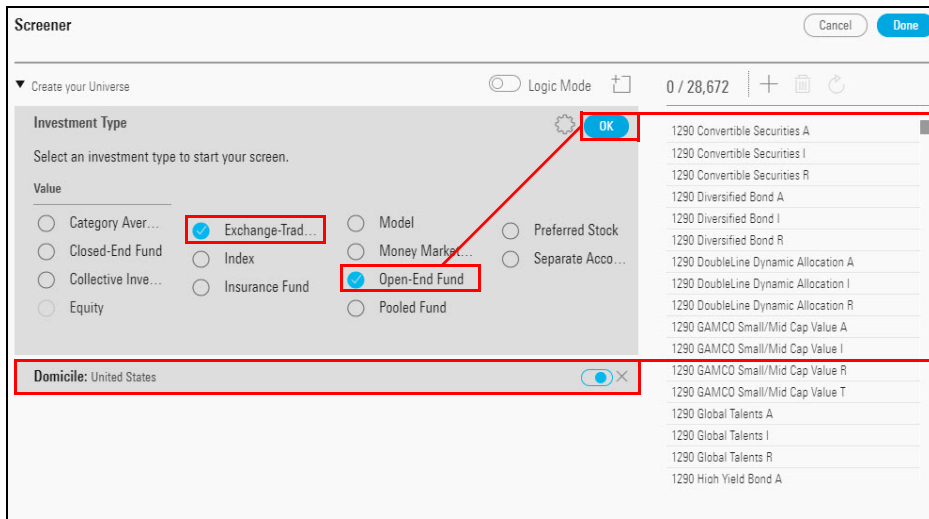
For this exercise, you will create a new screen, this time for open-end funds and ETFs with a Gold rating from a Morningstar analyst. The funds must also be open to new investors. To screen for investments meeting these criteria, do the following:

Exercise 4: Screen for Gold-rated funds

1. On the header, click the **Create** icon, then select **Screen**. The Screener window opens.



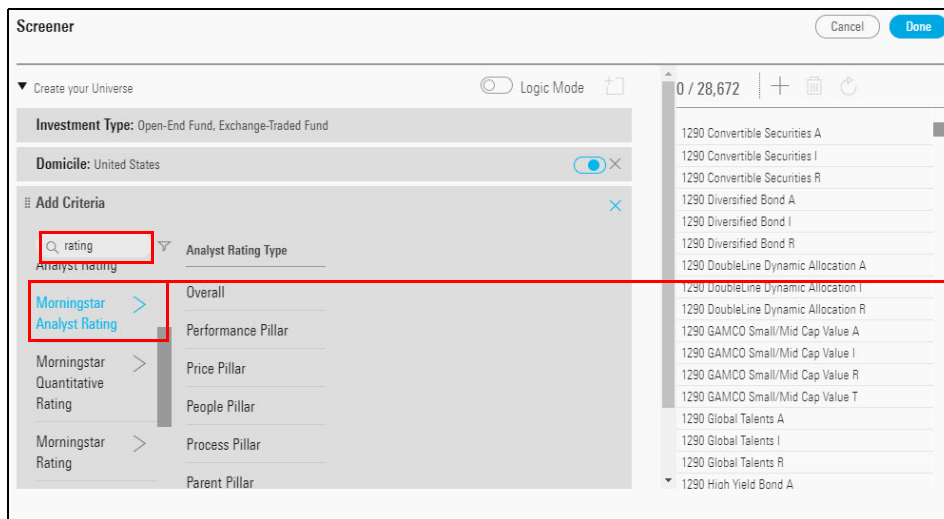
- In the Investment Type area, click **Exchange-Traded Fund** and **Open-End Fund**, then click **OK**.



After selecting your option(s) for a field, be sure to click OK

The Domicile criteria is included automatically, and is set to United States, saving you the trouble of having to filter for only those funds sold in the U.S.

- To find funds with a Gold Morningstar Analyst Rating, in the Add Criteria **Search for data points** field, type **rating**.
- Select **Morningstar Analyst Rating**.



Note the search term, and the item to select

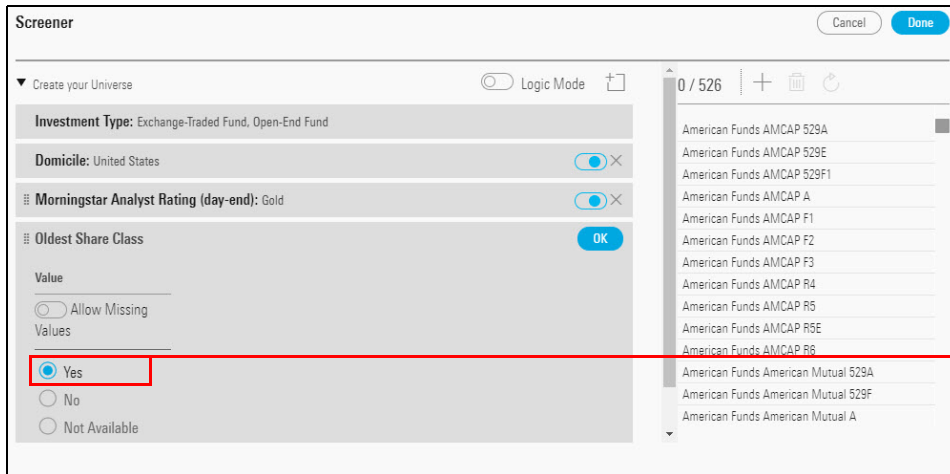
- Select **Gold**, then click **OK**.

The screenshot shows the 'Screener' application window. On the left, under 'Morningstar Analyst Rating (day-end)', the 'Operator' is set to 'Include' and the 'Value' is set to 'Gold'. The 'OK' button is highlighted with a red box. A red line connects this 'OK' button to a callout box on the right that says 'Select this option, then click OK'. The right side of the window shows a list of funds, with the first few items being '1290 Convertible Securities A', '1290 Convertible Securities I', and '1290 Convertible Securities R'.

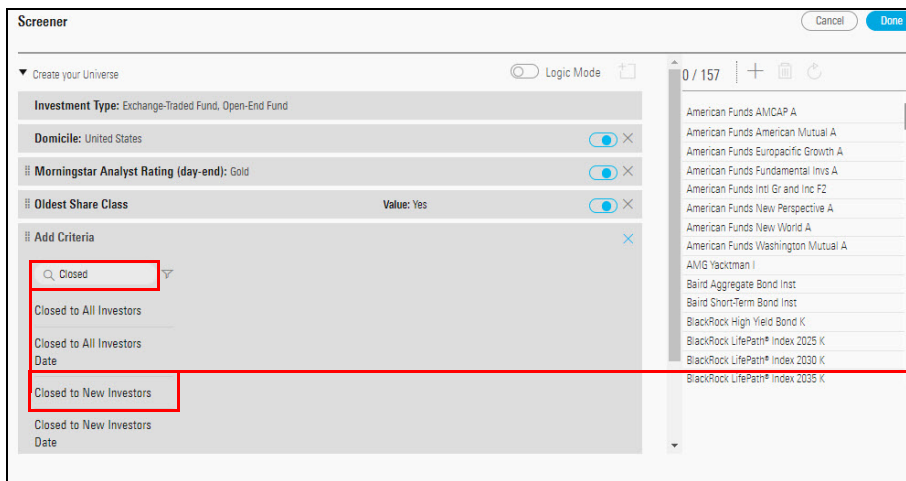
- To find a single instance of each fund, in the Add Criteria **Search for data points** field, type **old**. Select **Oldest Share Class**. Some additional fields now appear.

The screenshot shows the 'Screener' application window. In the 'Add Criteria' section, the search field contains 'oldes' and 'Oldest Share Class' is selected from the dropdown menu. A red box highlights the search field and the selected item. A red line connects this selection to a callout box on the right that says 'Note the search term, and the item to select'. The right side of the window shows a list of funds, with the first few items being 'American Funds AMCAP 529A', 'American Funds AMCAP 529E', and 'American Funds AMCAP 529F1'.

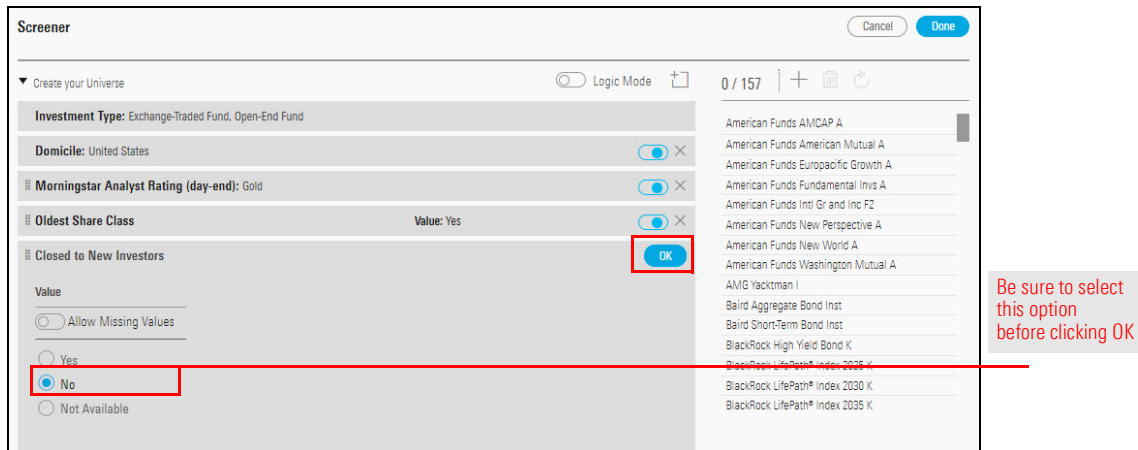
- The option for Yes should be selected already; click **OK**.



- To find funds open to new investors, in the Add Criteria **Search for data points** field, type **open**. Note that the data point you are looking for does not appear.
- Clear the Search for data points field and enter **closed**.
- Select **Closed to New Investors**.



11. Select the option for **No**, then click **OK**.

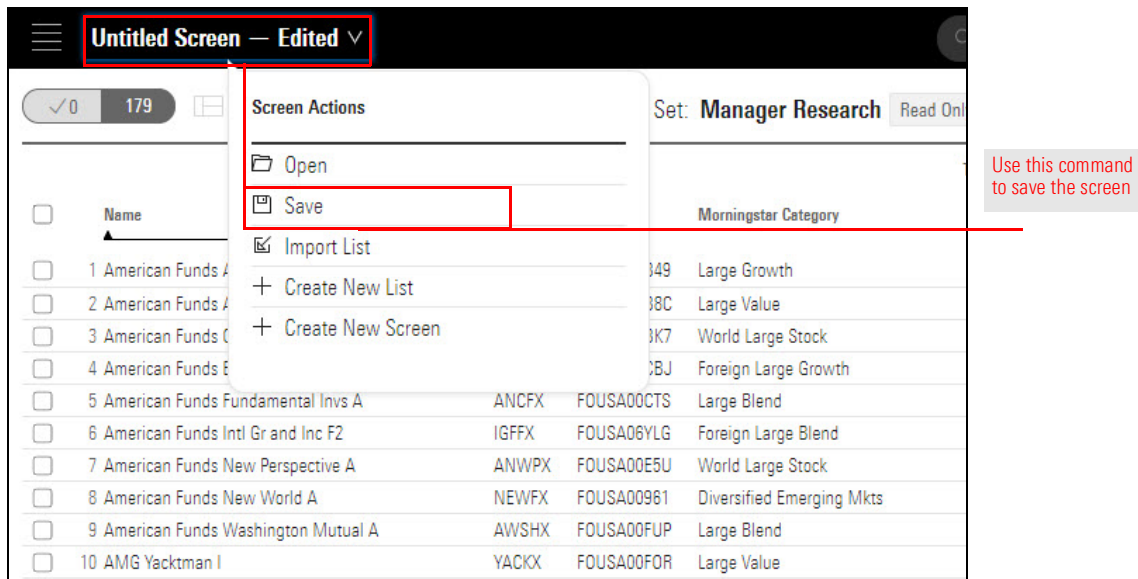


12. Click **Done**. The Screener window closes and the workbook opens.

To save the screen you created for Gold-rated funds, do the following:

Exercise 5: Save the screen you created

1. Click the **Lists & Screens** drop-down field and select **Save**. A dialog box opens.



2. In the **Enter a screen name** field, type **Analyst Rated Funds**.

3. Click **Save**. The name of the screen updates automatically.

In this exercise, the screen you saved will be modified to look for only large cap funds, and then re-saved. You will also learn an alternate way to screen for a popular data point.

Exercise 6: Modify a screen to find only large cap funds

Do the following:

1. On the grid header, click the **Open Screener** icon. The Screener window opens.

Name	Ticker	SecId	Morningstar Category
1 American Funds AMCAP A	AMCPX	FOUSA00B49	Large Growth
2 American Funds American Mutual A	AMRMX	FOUSA00B8C	Large Value
3 American Funds Capital World Gr&Inc A	CWGIX	FOUSA00BK7	World Large Stock
4 American Funds Europacific Growth A	AEPGX	FOUSA00CBJ	Foreign Large Growth
5 American Funds Fundamental Invs A	ANCFX	FOUSA00CTS	Large Blend
6 American Funds Intl Gr and Inc F2	IGFFX	FOUSA06YLG	Foreign Large Blend
7 American Funds New Perspective A	ANWFX	FOUSA00E5U	World Large Stock
8 American Funds New World A	NEWFX	FOUSA00961	Diversified Emerging Mkts
9 American Funds Washington Mutual A	AWSHX	FOUSA00FUP	Large Blend
10 AMG Yackman I	YACKX	FOUSA00FOR	Large Value
11 Baird Aggregate Bond Inst	BAGIX	FOUSA00P4Y	Intermediate Core Bond

Use this icon to open the Screener window

2. To find only large cap funds, in the Add Criteria **Search for data points** field, type **peer**.
3. Select **Morningstar Category**. Some additional fields now appear.

Screener

Create your Universe

Investment Type: Exchange-Traded Fund, Open-End Fund

Logic Mode

0 / 138

Investment Type: Exchange-Traded Fund, Open-End Fund

|| Domicile: United States

|| Morningstar Analyst Rating (day-end): Gold

|| Oldest Share Class Value: Yes

|| Closed to New Investors Value: No

|| Add Criteria

peer

Morningstar Category

Data Definition for Morningstar Category

A peer group assigned by Morningstar to distinguish funds by their portfolio, investment objective, and style. Morningstar Category allows for a comparison between similar investments.

American Funds AMCAP A

American Funds American Mutual A

American Funds Europacific Growth A

American Funds Fundamental Invs A

American Funds Intl Gr and Inc F2

American Funds New Perspective A

American Funds New World A

American Funds Washington Mutual A

AMG Yackman I

Baird Aggregate Bond Inst

Baird Short-Term Bond Inst

BlackRock High Yield Bond K

BlackRock LifePath® Index 2025 K

BlackRock LifePath® Index 2030 K

BlackRock LifePath® Index 2035 K

BlackRock LifePath® Index 2040 K

BlackRock LifePath® Index 2045 K

BlackRock LifePath® Index 2050 K

The smart search capability in Morningstar Office Cloud occasionally allows you to find a data point by searching for a synonym of a data point's name

4. In the Value **Search** field, type **large**. The list of available categories updates to match your search term.

5. Select **Large Blend**, **Large Growth**, and **Large Value**.

6. Click **OK**.
7. Click **Done**. The Screener window closes and the workbook is displayed.
8. From the drop-down field, select **Save**. (In this exercise, it is OK to overwrite the previously saved screen.)

Remember that the results of a screen are dynamic. Depending on the criteria you include, the investments found via a screen could change from day-to-day. This exercise shows you how to save the results of a screen to a list, in case you want to maintain a static list of items as well. Do the following:

Exercise 7: Save funds from a screen to a list

1. To choose the investments to be included in the list, click the **Select all** button above the grid view.

The screenshot shows the 'Analyst Rated Funds' screen. At the top left, there is a 'Select all' button (a square with a checkmark) highlighted with a red box. Below it is a table of funds. The table has columns for Name, Ticker, SecId, Morningstar Category, and Total F. The first 10 rows of the table are visible, each with a blue checkmark in the left margin.

	Name	Ticker	SecId	Morningstar Category	Total F
<input checked="" type="checkbox"/>	1 American Funds AMCAP A	AMCPX	FOUSA00B49	Large Growth	
<input checked="" type="checkbox"/>	2 American Funds American Mutual A	AMRMX	FOUSA00B8C	Large Value	
<input checked="" type="checkbox"/>	3 American Funds Fundamental Invs A	ANCFX	FOUSA00CTS	Large Blend	
<input checked="" type="checkbox"/>	4 American Funds Washington Mutual A	AWSHX	FOUSA00FUP	Large Blend	
<input checked="" type="checkbox"/>	5 AMG Yackman I	YACKX	FOUSA00FOR	Large Value	
<input checked="" type="checkbox"/>	6 DFA US Large Company I	DFUSX	FOUSA00AOK	Large Blend	
<input checked="" type="checkbox"/>	7 Diamond Hill Large Cap A	DHLAX	FOUSA02UMA	Large Value	
<input checked="" type="checkbox"/>	8 Dodge & Cox Stock	DODGX	FOUSA00C30	Large Value	
<input checked="" type="checkbox"/>	9 Fidelity* 500 Index	FXAIX	F00000LZSI	Large Blend	
<input checked="" type="checkbox"/>	10 Fidelity* Total Market Index	FSKAX	F00000MJS0	Large Blend	

Click this icon to select all rows at once

2. On the grid header, click the **Actions** icon and select **Save As New List**.

The screenshot shows the same 'Analyst Rated Funds' screen. The 'Actions' icon (a square with a checkmark) in the top toolbar is highlighted with a red box. A dropdown menu is open, showing several options. The 'Save As New List' option is highlighted with a red box. The table of funds is visible in the background.

	Name	Ticker	SecId	Morningstar Category	Total F
<input checked="" type="checkbox"/>	1 American Funds AMCAP A	AMCPX	FOUSA00B49	Large Growth	
<input checked="" type="checkbox"/>	2 American Funds American Mutual A	AMRMX	FOUSA00B8C	Large Value	
<input checked="" type="checkbox"/>	3 American Funds Fundamental Invs A	ANCFX	FOUSA00CTS	Large Blend	
<input checked="" type="checkbox"/>	4 American Funds Washington Mutual A	AWSHX	FOUSA00FUP	Large Blend	
<input checked="" type="checkbox"/>	5 AMG Yackman I	YACKX	FOUSA00FOR	Large Value	
<input checked="" type="checkbox"/>	6 DFA US Large Company I	DFUSX	FOUSA00AOK	Large Blend	
<input checked="" type="checkbox"/>	7 Diamond Hill Large Cap A	DHLAX	FOUSA02UMA	Large Value	
<input checked="" type="checkbox"/>	8 Dodge & Cox Stock	DODGX	FOUSA00C30	Large Value	
<input checked="" type="checkbox"/>	9 Fidelity* 500 Index	FXAIX	F00000LZSI	Large Blend	
<input checked="" type="checkbox"/>	10 Fidelity* Total Market Index	FSKAX	F00000MJS0	Large Blend	

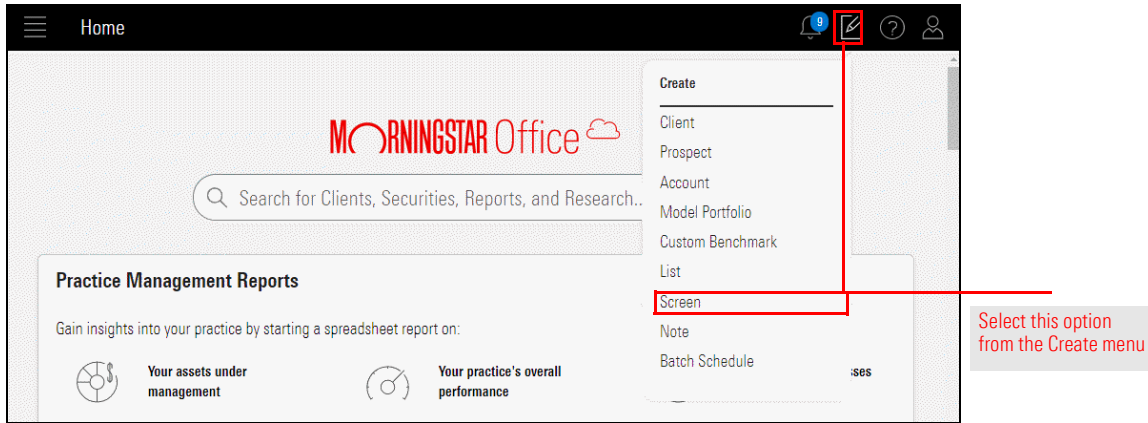
Use this command to save the results of the screen to a list

3. In the **Enter list name** field, type **Gold-Rated Large Cap Funds**.

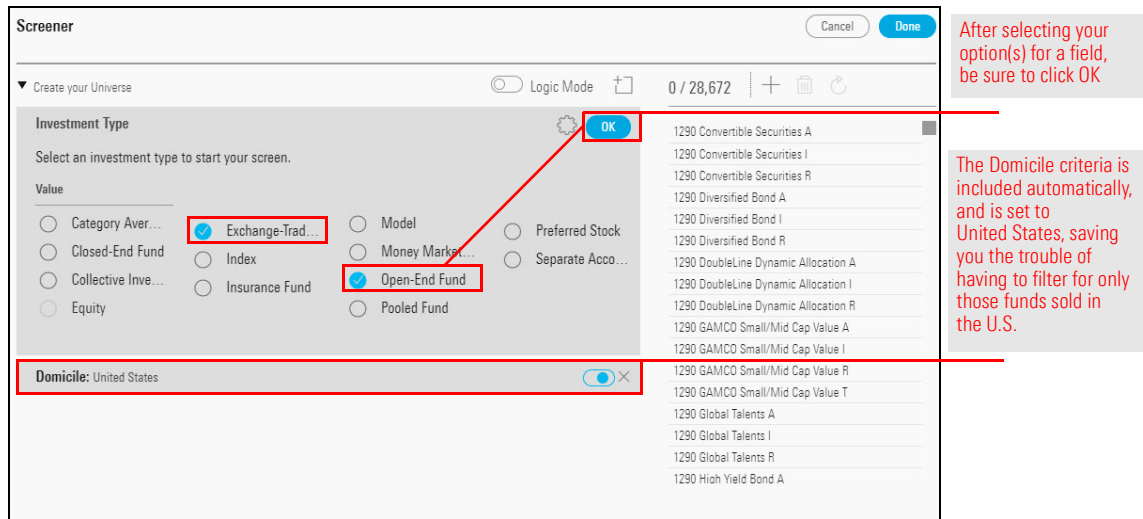
How many passively managed open-end funds and ETFs are in the Mid-Cap Value category? This exercise not only provides additional practice in creating and saving a screen, but also shows you another smart search term you can use to find a particular data point. Do the following:

Exercise 8: Find passively managed funds

1. On the header, click the **Create** icon, then select **Screen**. The Screener window opens.

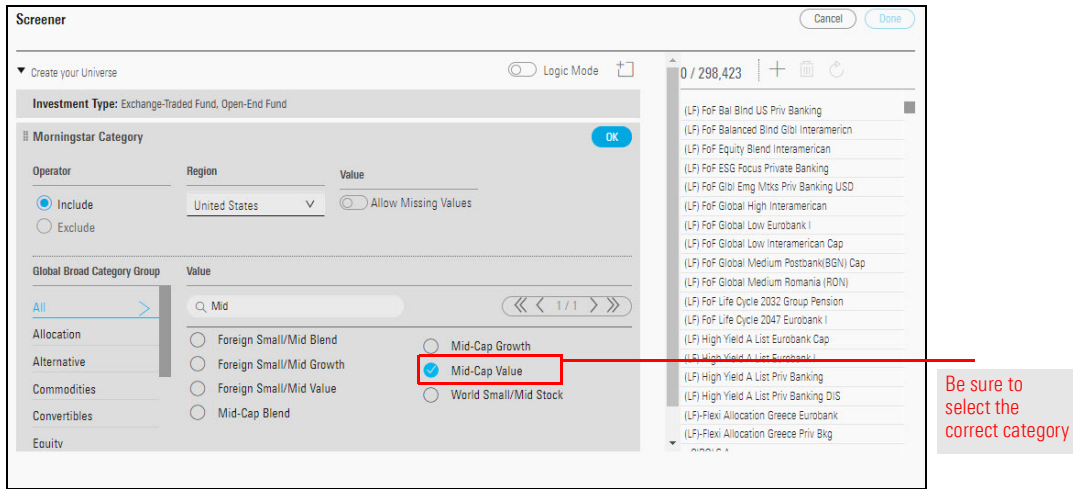


2. Select **Exchange-Traded Fund** and **Open-End Fund**.



3. Click **OK**.
4. In the Add Criteria area, in the **Search for data points** field, enter **peer**, then select **Morningstar Category**.

- In the **Filter** field under the Value area, type **mid**, then select **Mid-Cap Value**.



- Click **OK**.
- In the Add Criteria area, in the **Search for data points** field, enter **passive**, then select **Index Fund**. The Value for this data point defaults to Yes.



- Click **OK**.
- Click **Done**. The Screener window closes, and you are returned to the workbook.
- Save** the screen with the name **Passive Mid-Cap Value Funds**.

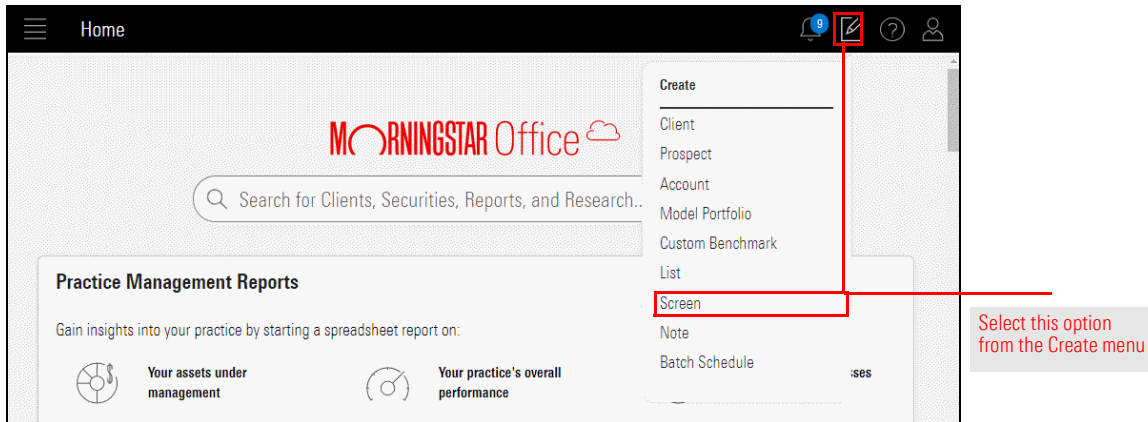
How many separate accounts and collective investment trusts (CITs) self-identify as socially responsible funds, with a focus on the environment?

Exercise 9: Find socially responsible separate accounts and CITs

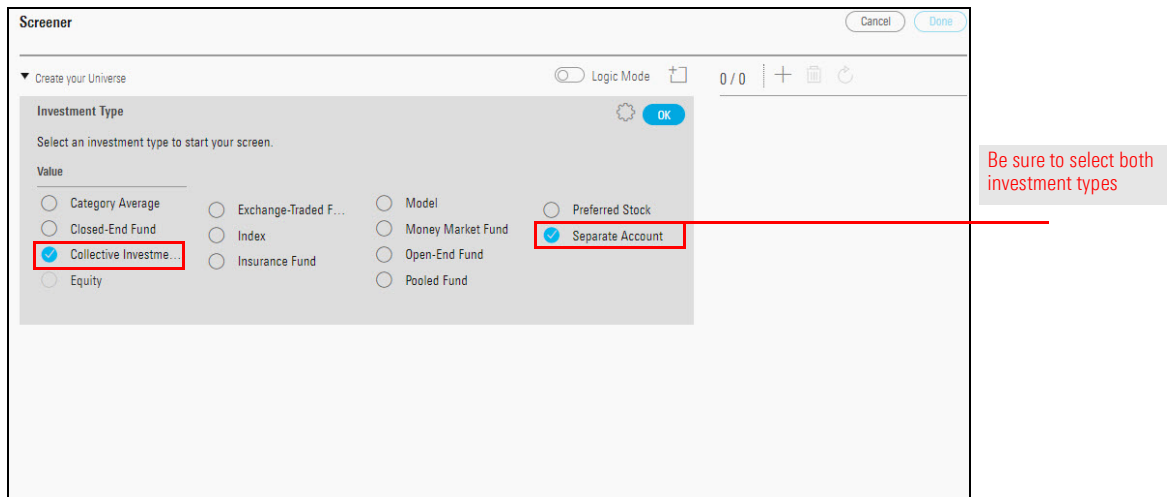
This exercise allows you to screen for two new investment types, and shows you a trick for finding a data point if it doesn't automatically appear when you search for it.

1. On the header, click the **Create** icon, then select **Screen**. The Screener window opens.

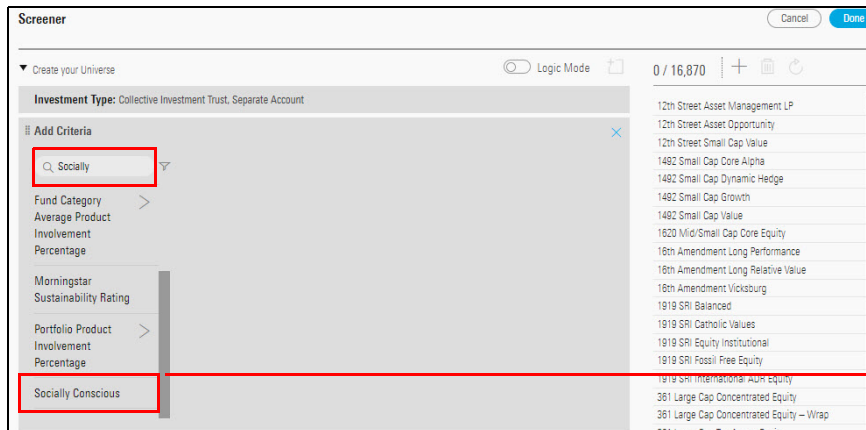
Note: If you are prompted to save the workbook, click **Don't Save**.



2. Select **Collective Investment Trust**, and **Separate Account**, then click **OK**. The investment type (or types) you select determine the subsequent data points available to you in a screen. For example, after selecting these two investment types, you cannot use "Morningstar Stock Star Rating" as a criterion for the screen because that data point does not exist for these two investment types.

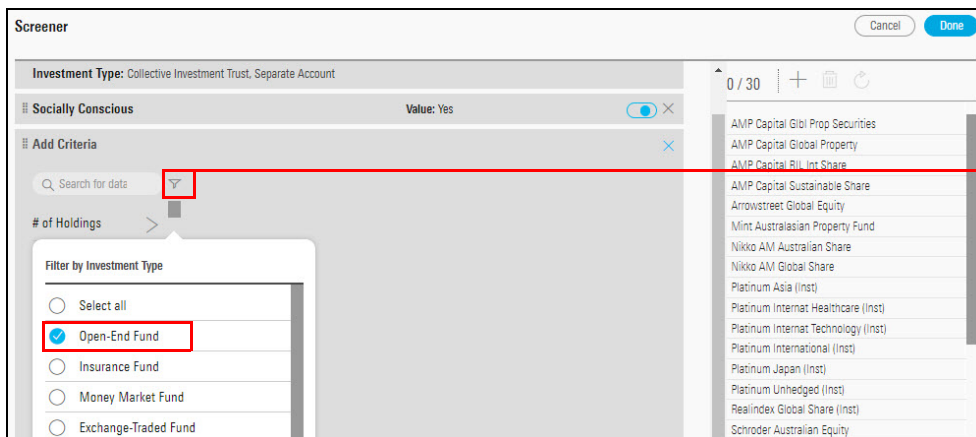


- In the Add Criteria area, in the **Search for data points** field, enter **social**, then select **Socially Conscious**. The Value defaults to Yes.



Note the term to search for, and the data point to select

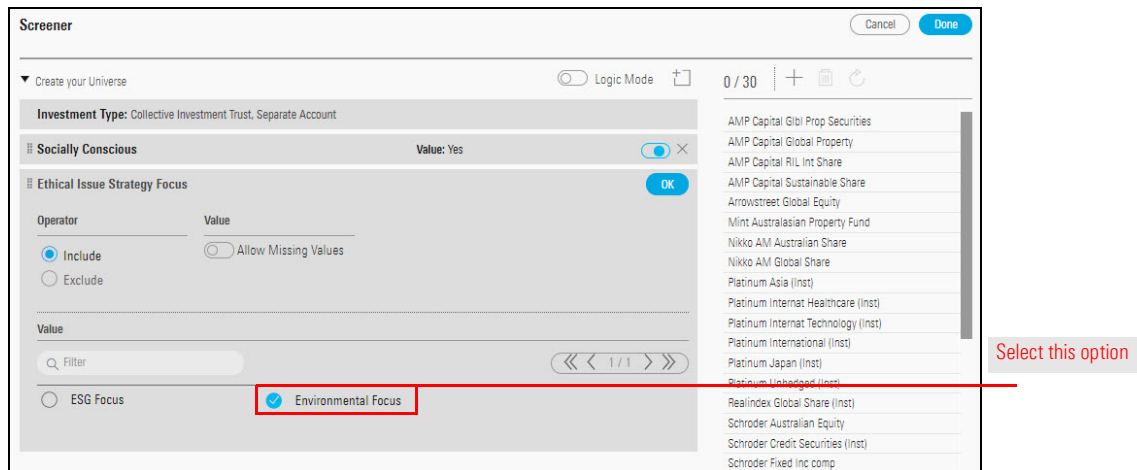
- Click **OK**.
- The next data point is Ethical Issue Strategy Focus, which helps find investments particularly focused on the environment. In the Add Criteria area, in the **Search for data points** field, enter **focus**. Note that only Product Focus appears as a data point.
- To the right of the search field, click the **filter** icon. The Filter by Investment Type menu opens.
- Select **Open-End Fund**. This allows you to see data points for that universe as well.



Use this icon to select the highlighted option

- Click outside the Filter by Investment Type menu to close it.
- Select **Ethical Issue Strategy Focus**.

10. Select **Environmental Focus**.



11. Click **OK**.

12. Click **Done**. The Screener window closes, and the workbook is displayed.

13. **Save** the screen as **Environmentally Focused CITs/SAs**.

