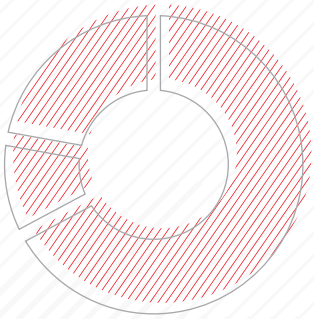
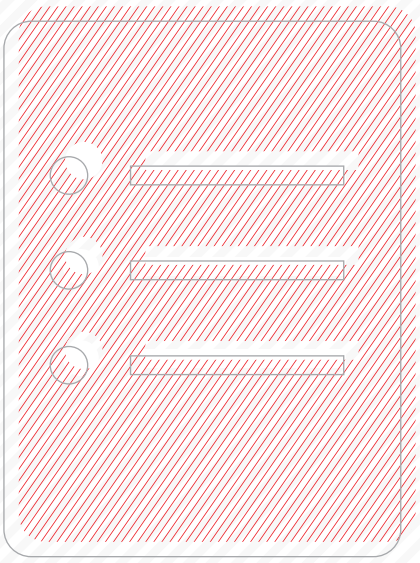
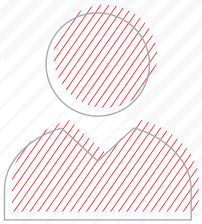
Leveraging Morningstar Research

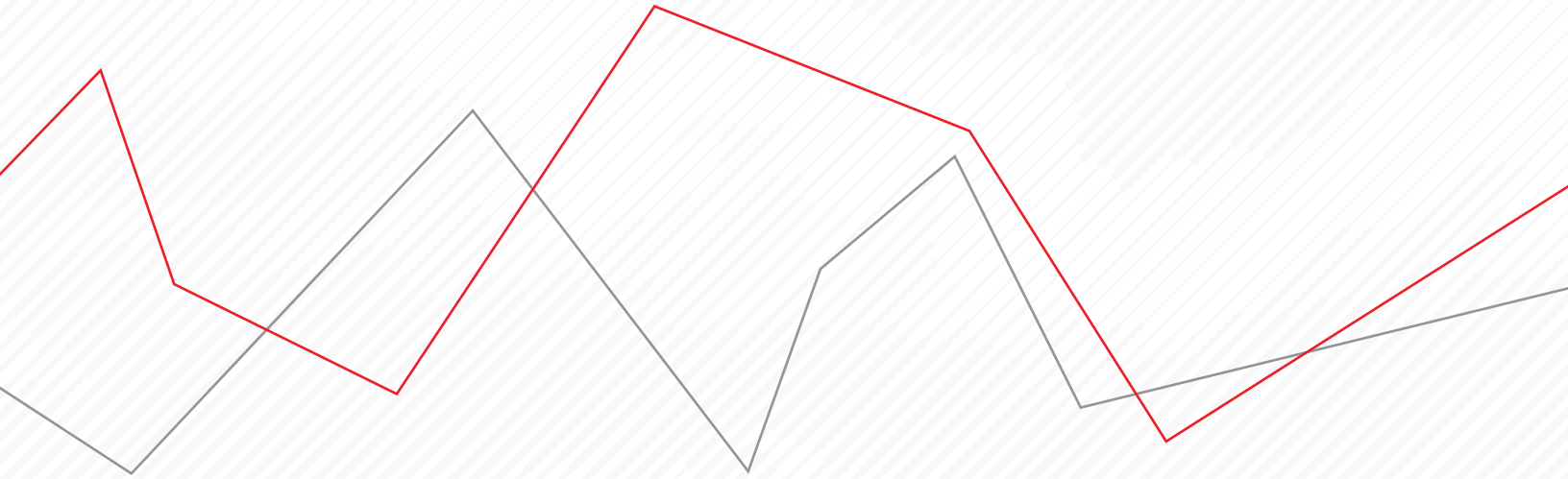
Morningstar Office℠ Cloud







MORNINGSTAR Office



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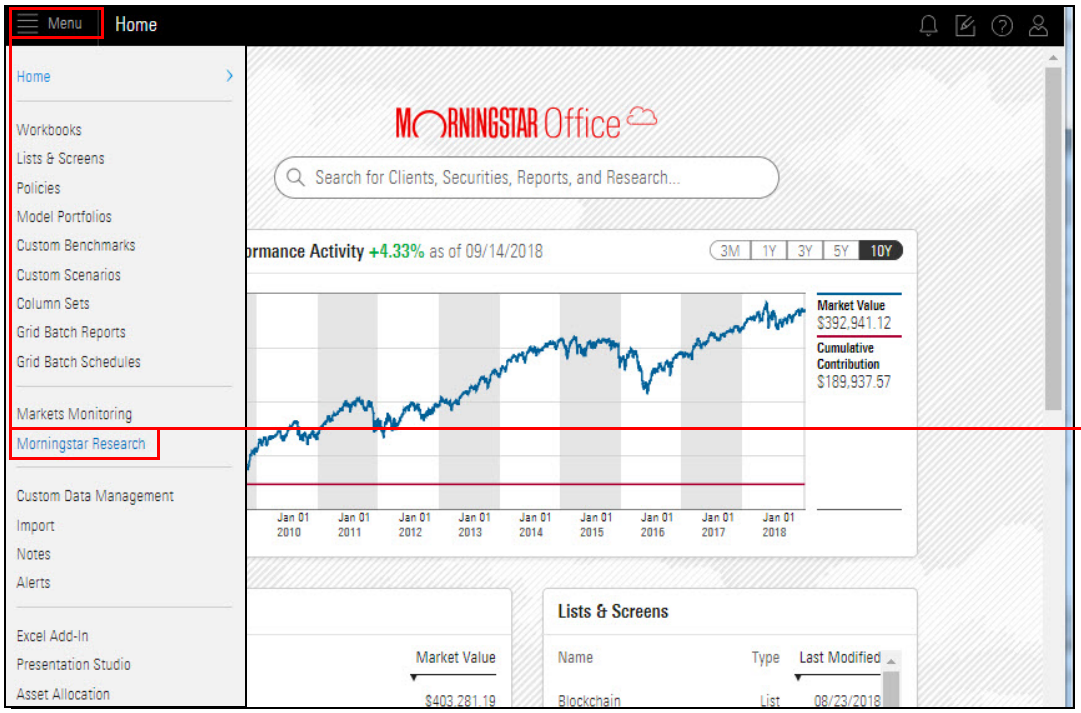
Leveraging Morningstar Research

Overview

This workbook shows you how to take advantage of the Morningstar Research area of Morningstar Office℠ Cloud. The Morningstar Research area contains links to content from Morningstar's Research team—our analysts on managed investments, equities, fixed income, macroeconomic trends, and more.



The Morningstar Research area offers links to a wealth of content from Morningstar analysts.

This manual covers the following topics:

- ▶
- ▶ Using the Featured Page (page 6)
- ▶ Using the Latest Page (page 18)
- ▶ Using the Publications Page (page 24)
- ▶ Using the Topics Page (page 30)
- ▶ Using My Research (page 32)
- ▶ Accessing Morningstar Research from an Investment Workbook (page 40)

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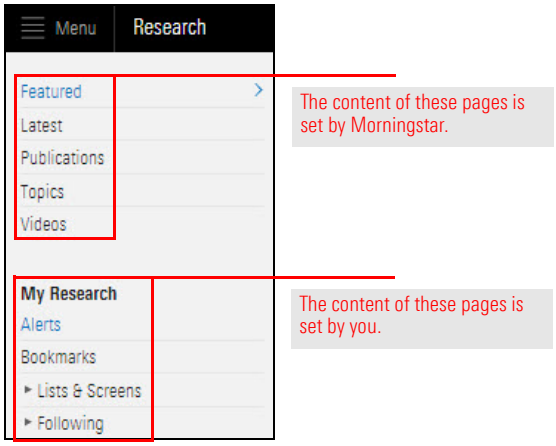
The content for the Morningstar Research area is organized into the following pages:

- Featured
- Latest
- Publications
- Topics, and
- Videos.

In addition, the section My Research is organized into the following pages:

- Alerts
- Bookmarks
- Lists & Screens, and
- Following.



Each page is accessible from the navigation pane at the left on any Morningstar Research page. The exercises in this manual guide you as you explore the functionality available the Morningstar Research pages.

> ☞ Note: By now, you should have completed the Creating Lists and Workbooks exercise guide, where you learned how to save a static set of investments as a list. This exercise guide references some of the skills and functionality covered there.

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Using the Featured Page

Overview

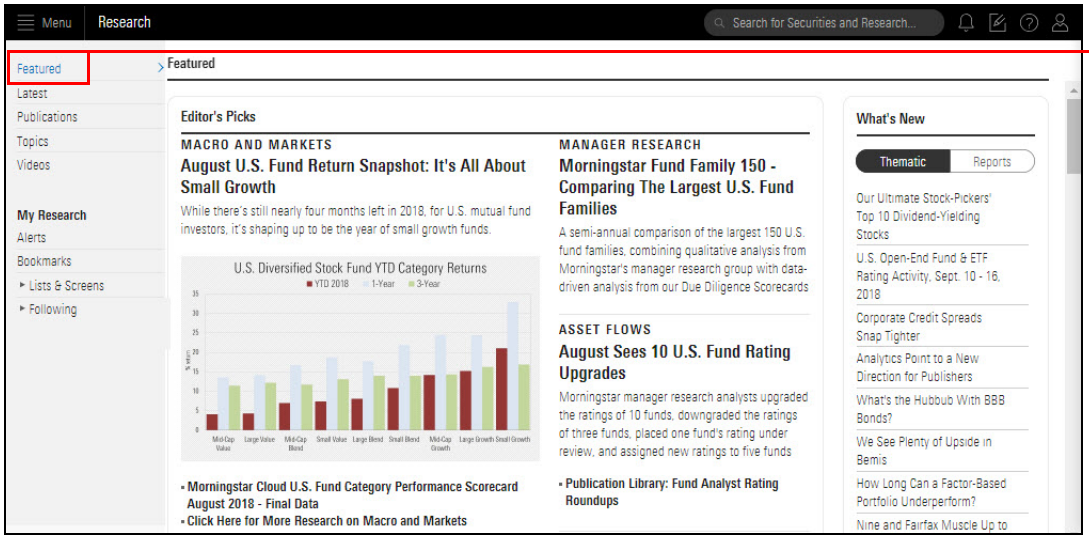
This section explains how the content on the Featured page is curated, how to see the most popular content, and how to use the search capability within the Research area.

In this section, you will learn how to do the following:

- understand what content is available on the Featured page (page 6)
- view the most recent content on the Featured page (page 7)
- search for content (page 8)
- make an article easier to read (page 10)
- share content with a colleague (page 11), and
- build a list from content on a Morningstar research page (page 12).

What content does the Featured page show?

The Featured page is curated daily by a Morningstar editor. The most topical stories from the Morningstar Research team appear here to allow you to quickly find and read content relevant to the day's most popular topics.



The content on the Featured page is updated daily.

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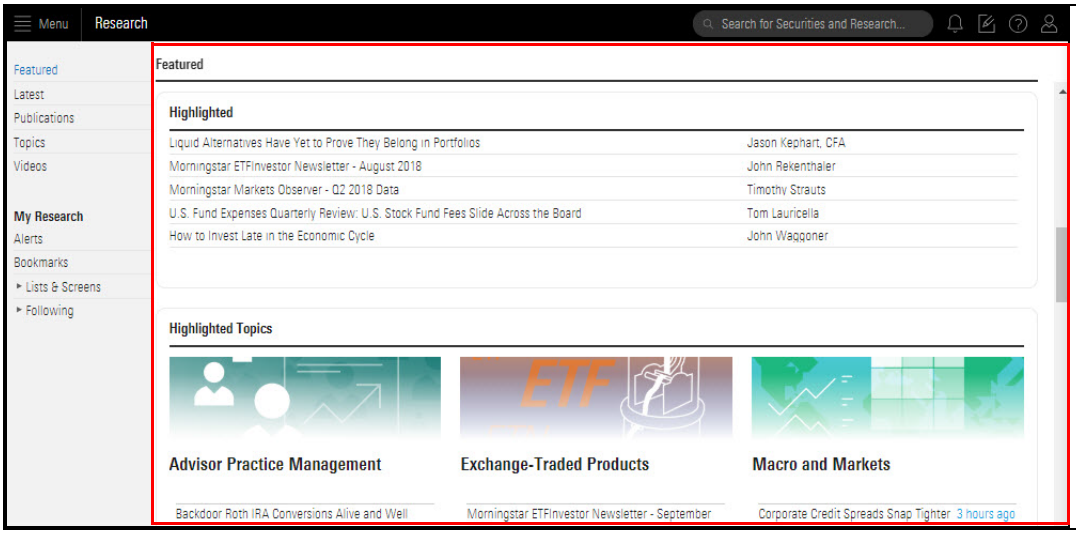
You can also scroll down on the Featured page to preview content from other Research pages, such as other recent articles and reports, highlighted topics, material from Morningstar's analysts, and videos in the spotlight.



The Featured page also offers access to the top content from a number of other pages in the Research area.

Exercise 1: See the most recent content on the Featured page

The top of the Featured page highlights content for the current day. You can also choose to see the most popular content from the past week here.

What was the most viewed story from the Featured page during the past seven days? To find out, do the following:

1. From the **Menu**, select **Morningstar Research**. The Morningstar Research area opens on the Featured page.

The Morningstar Research area offers links to a wealth of content from Morningstar analysts.

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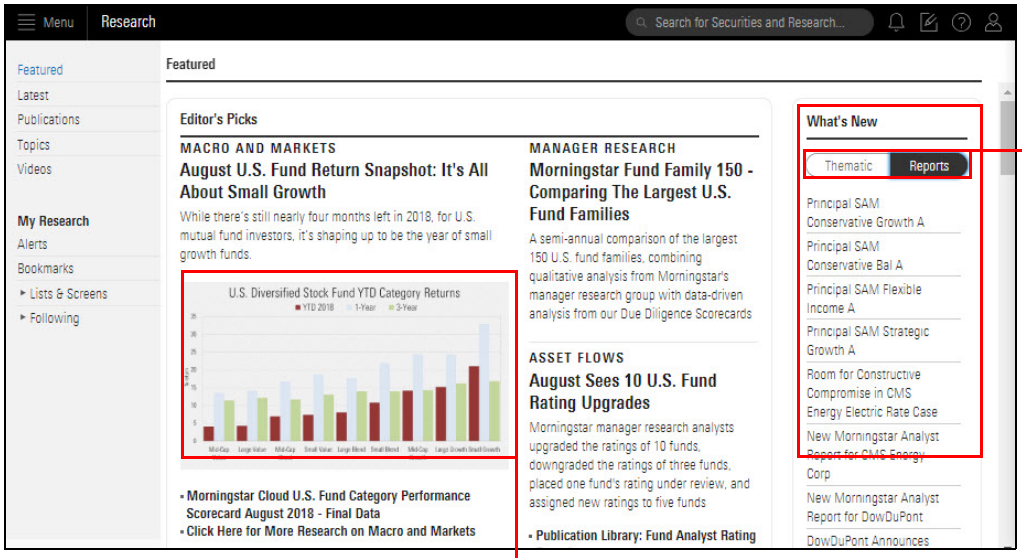
2. In the What's New area, click the **Reports** toggle at the right side of the screen. The 10 most recent analyst reports are listed.



Exercise 2: Search for content

You can search for research content from anywhere in Morningstar Office Cloud, simply by using the **Search** field in the upper-right part of the window. You can search for content by typing a term such as the following:

- a keyword (for example, Brexit or Sustainability)
- a security name or ticker, or
- another security identifier, such as CUSIP, SECID, or Fund ID.

When you search, you have the finding articles, videos, or the Morningstar Report for a list of related securities. You can also use the Filter icon to narrow the search results.

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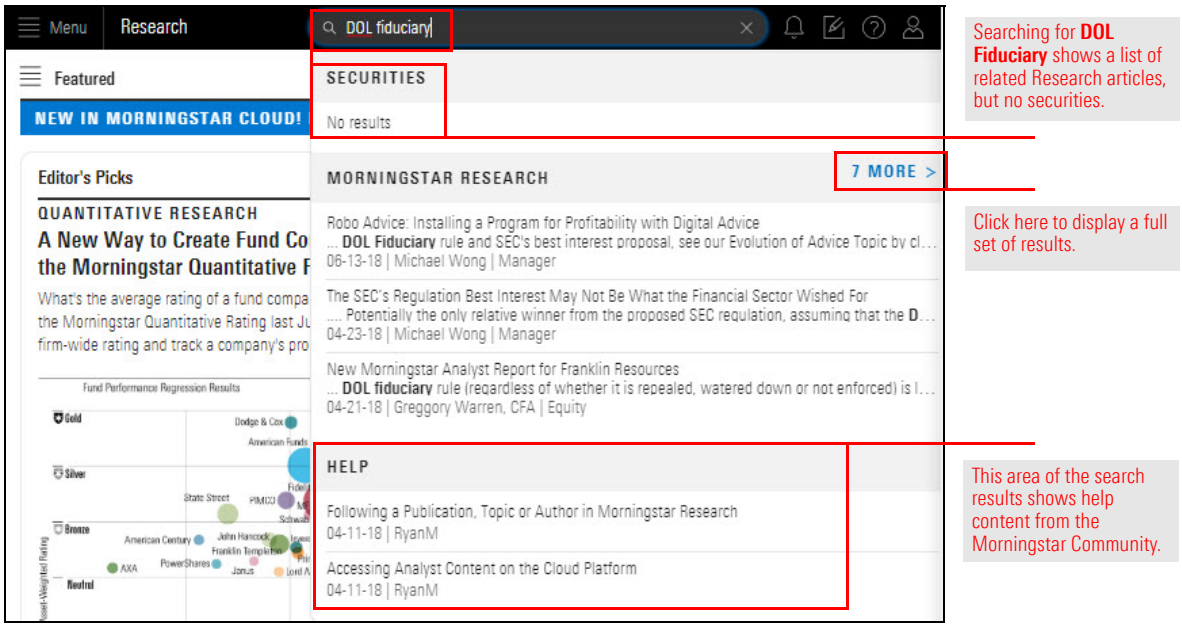
Do the following:

1. On the header of a Morningstar Research page, in the **Search** field, type **DOL Fiduciary**. A list of results appears automatically.
2. Click **More**. The full search results are displayed.



3. In the search results, click **Robo Advice: Installing a Program for Profitability with Digital Advice**. The article opens.

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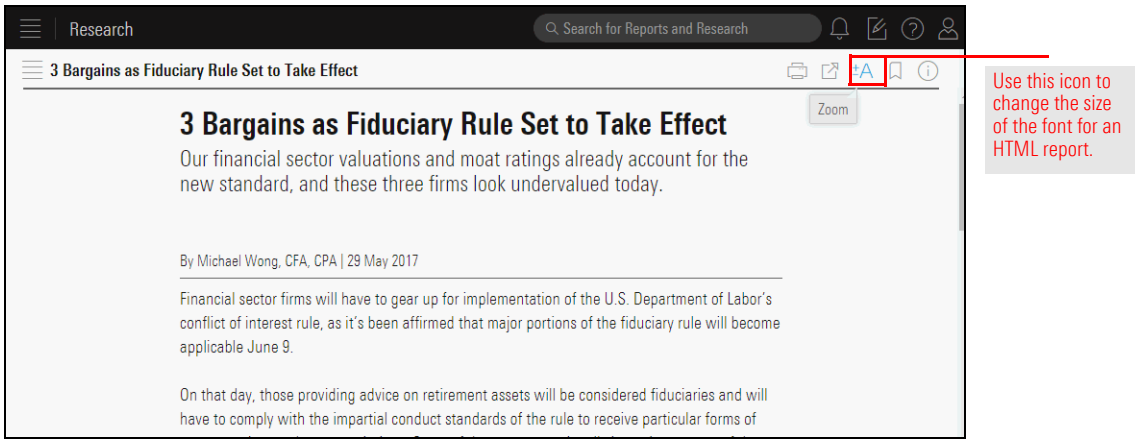
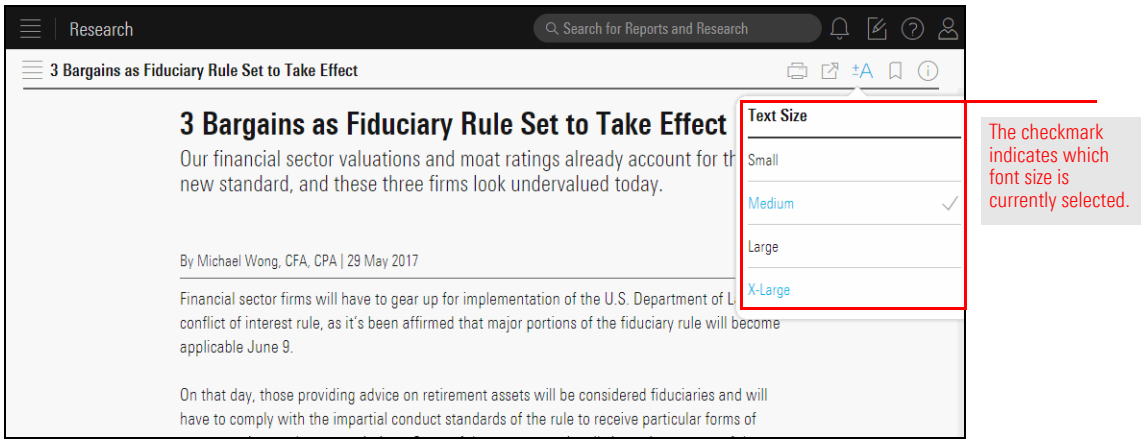
Exercise 3: Make an article easier to read

If you find the font size for reports difficult to read, you can easily increase the size of the text on the screen by doing the following:

1. In the header area at the top of the window, click the **Text Size** icon. The Text Size menu opens.



2. From the **Text Size** menu, select **Medium**. The font automatically resizes on the screen.



3. Now, reset the font size. From the header area at the top of the window, click the **Text Size** icon. The Text Size menu reopens.
4. Select **Large**. The font automatically resizes on the screen.

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Exercise 4: Share content from the Research area with a colleague

If you read an article or watch a video in the Morningstar Research area, and you think another Morningstar Office Cloud user would benefit from reading or watching it, you can send that user a link to the content.

To share content from Morningstar Research with another Morningstar Office Cloud user, do the following:

1. The article you selected should still be open. On the header area, click the **Share** icon. An email opens from your default email application (for example, Outlook). The email's Subject line is the same as the name of the article or video. The body of the email is also already composed, and includes a link to the item you are sharing.

The Share icon allows you to send a link to an article or video to another Morningstar Office Cloud subscriber.

2. Enter the **email address(es)** for the recipient(s), then click **Send**.

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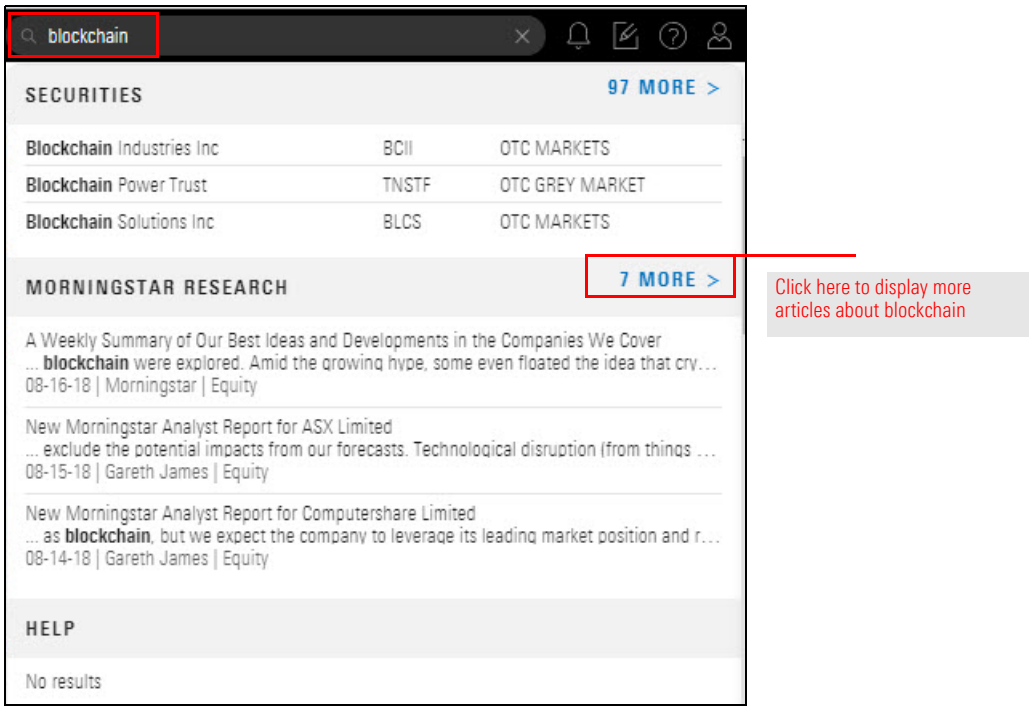
Exercise 5: Build a list from a Research page

When you are viewing an article or video on a Morningstar Research page, you can open a list of securities mentioned in the article or video. Not only does this provide a quick summary of the relevant securities, but it also allows you to save these securities to a list for further research in an investment workbook.

To build a list of securities from the Morningstar Research area, do the following:

1. In the header, in the **Search** field, enter a topic (in this example, **blockchain**).
2. In the search results, next to Morningstar Research, click **More**. Additional recent research articles (up to a maximum of 10) mentioning Blockchain are displayed.



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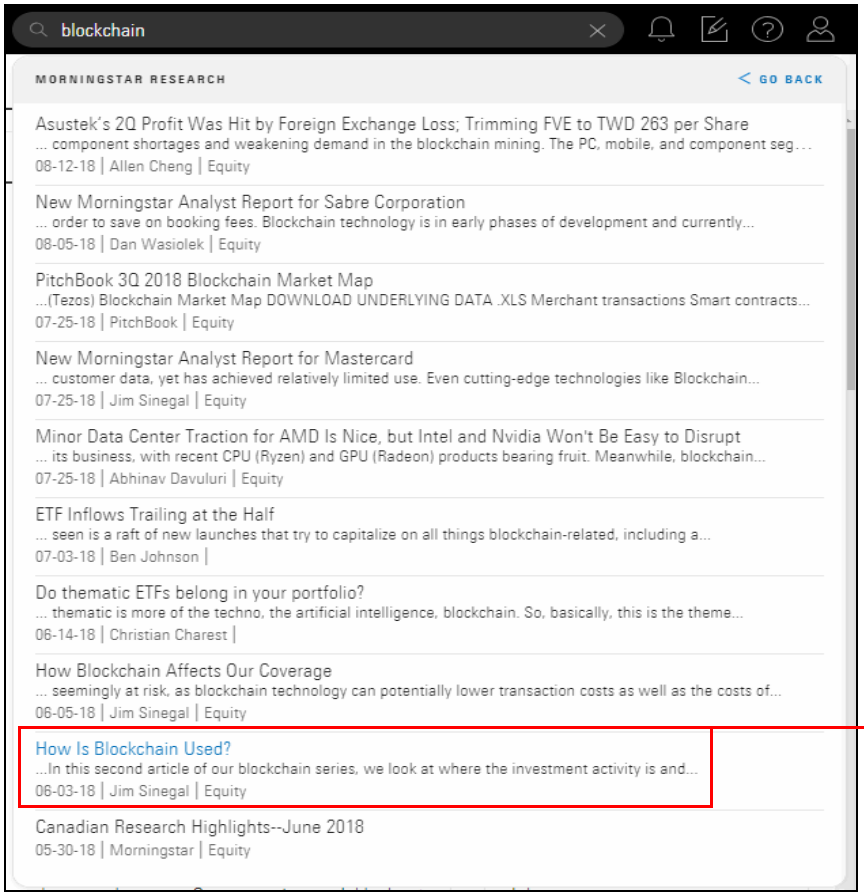
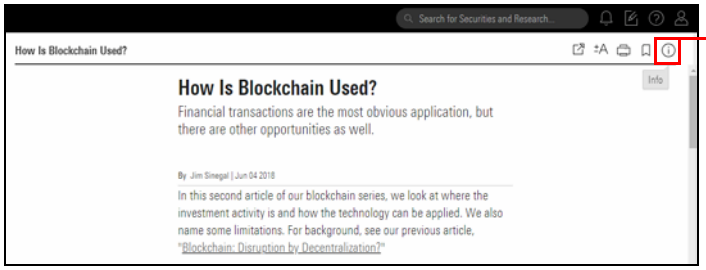
3. From the search results, select an **article** to open it.



4. The Mentioned Securities drawer should be open on the right side of the screen. If it is not displayed, click the **Info** icon. The Mentioned Securities drawer opens.



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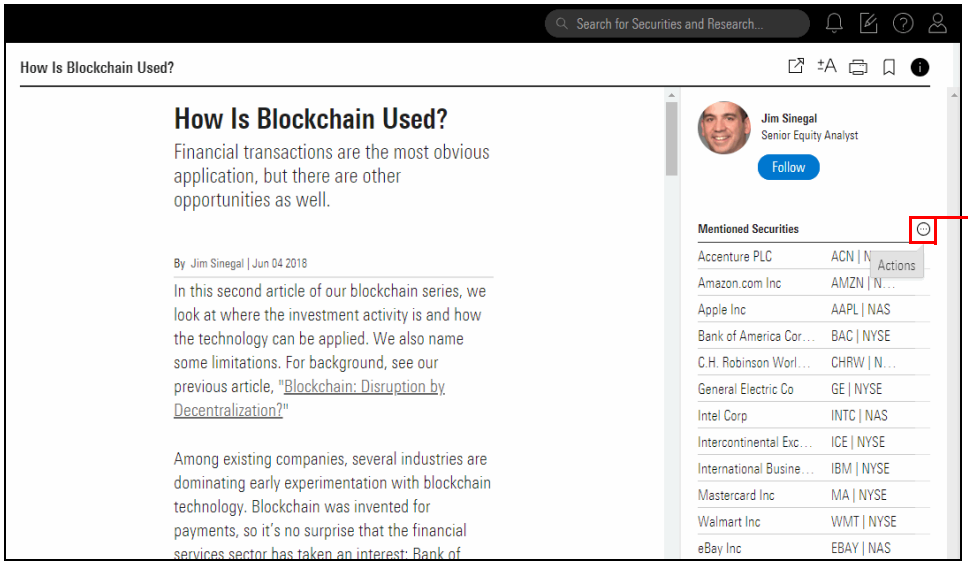
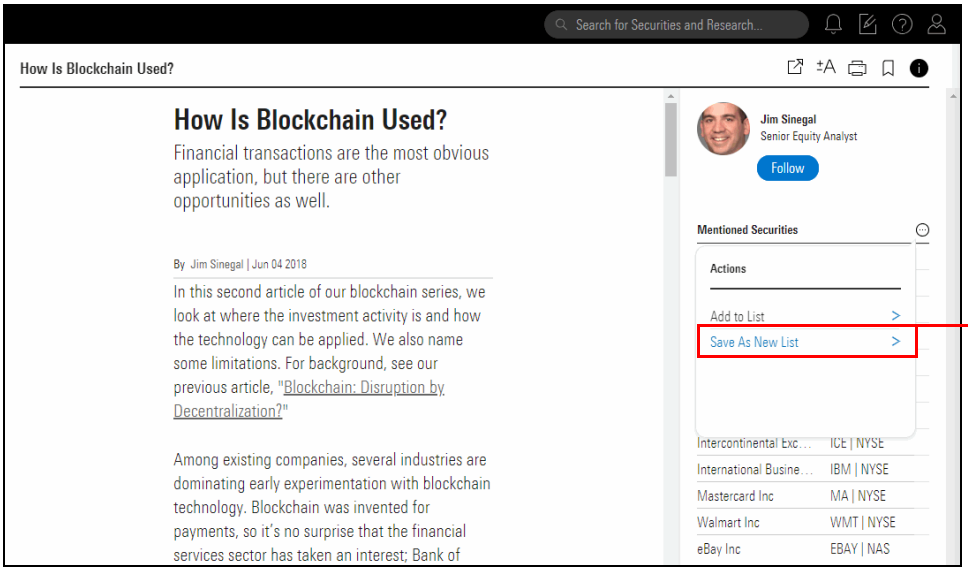
5. In the Mentioned Securities drawer, click the **Actions** icon. The Actions menu opens.



6. Click **Save As New List**.



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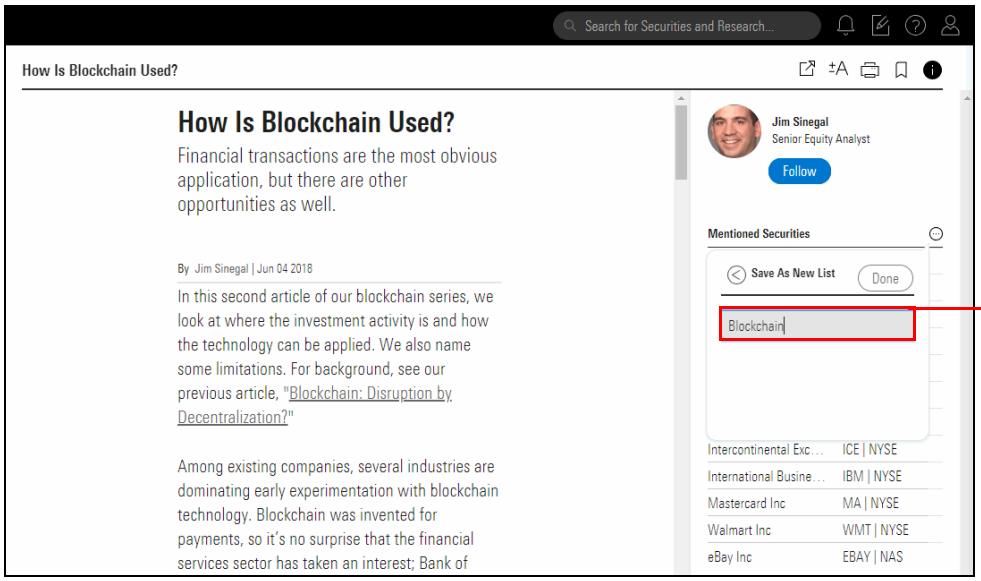
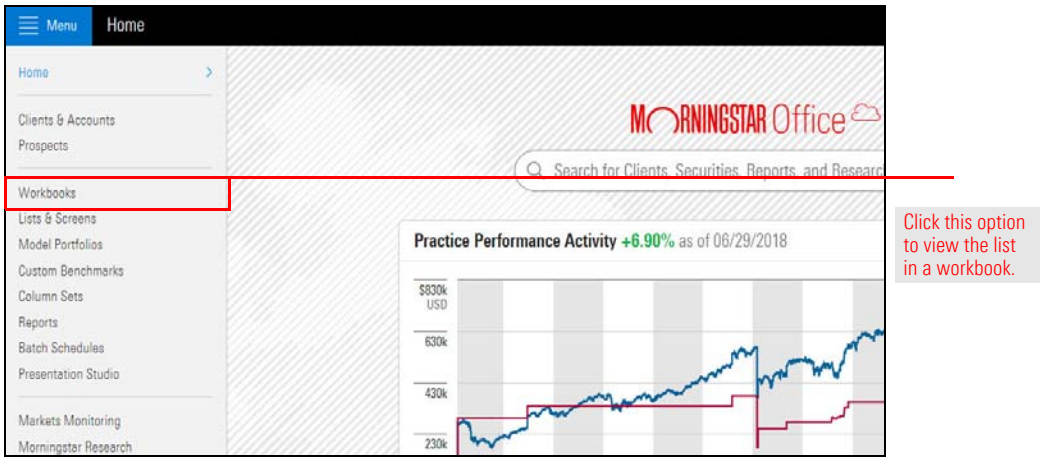
7. In the **Enter List Name** field, type **Blockchain**, then click **Done**. A confirmation message appears, to let you know the list has been saved.



8. To see the list in an Investment Workbook, in the upper-left corner of the window, hover the cursor over the **Menu**, then select **Workbooks**. The Workbooks page opens.



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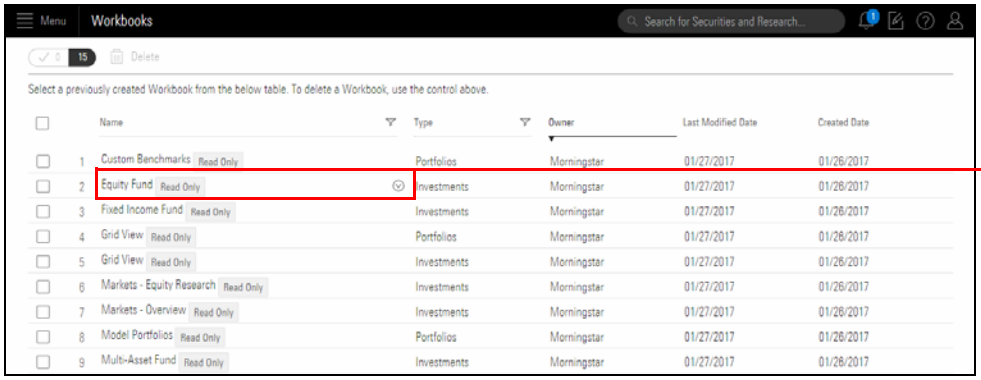
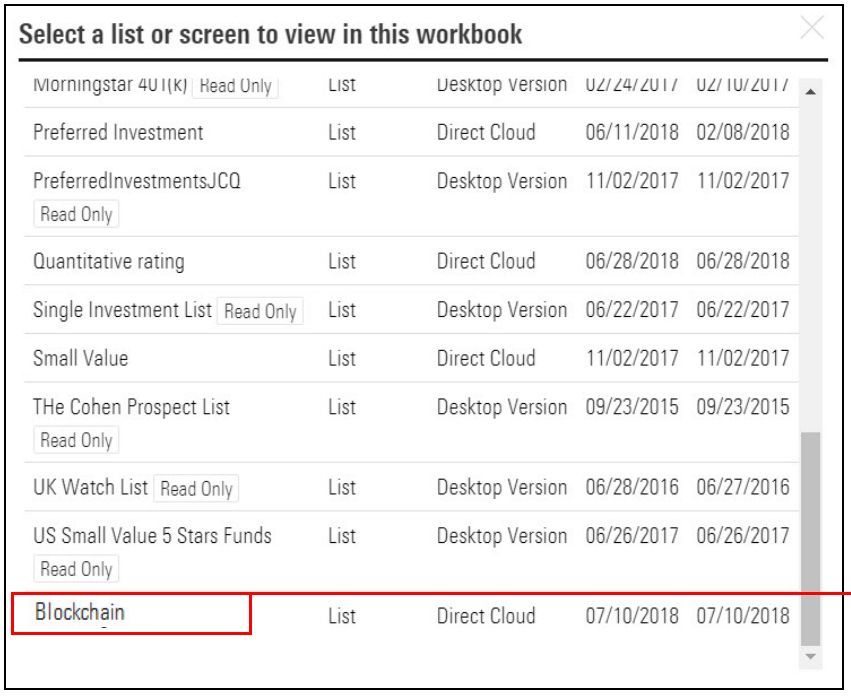
9. Select the **Equity Fund** workbook. A dialog box opens, asking you to select a list or screen.



Open the list in this workbook.

10. Click the **Blockchain** list you just saved. The workbook opens in the Grid View worksheet.



The list will appear on the bottom of the dialog box the first time it's opened in a workbook. After it will appear in alphabetical order.

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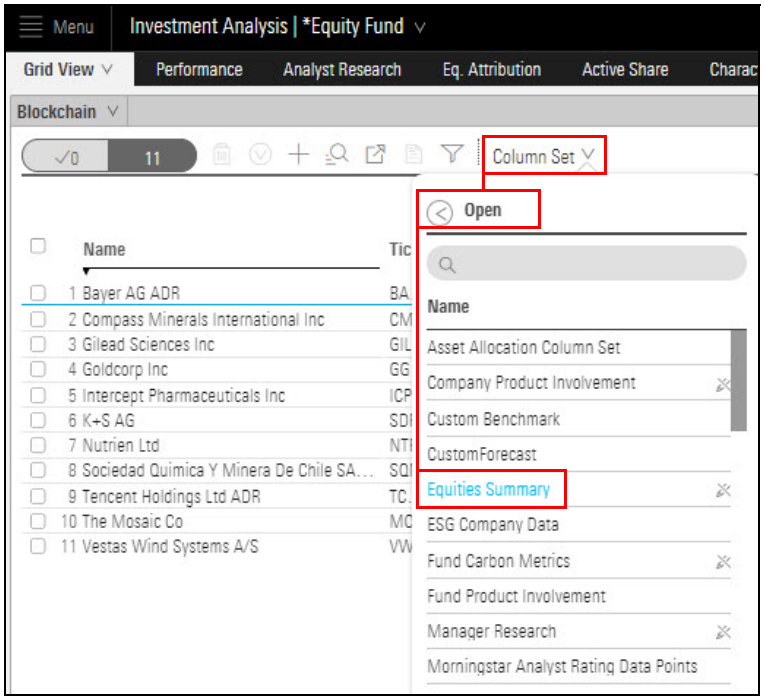
11. Click the **Column Set** menu, then select **Open**, then select **Equities Summary**. The page refreshes and displays the Equities Summary column set.



Note the highlighted selections.

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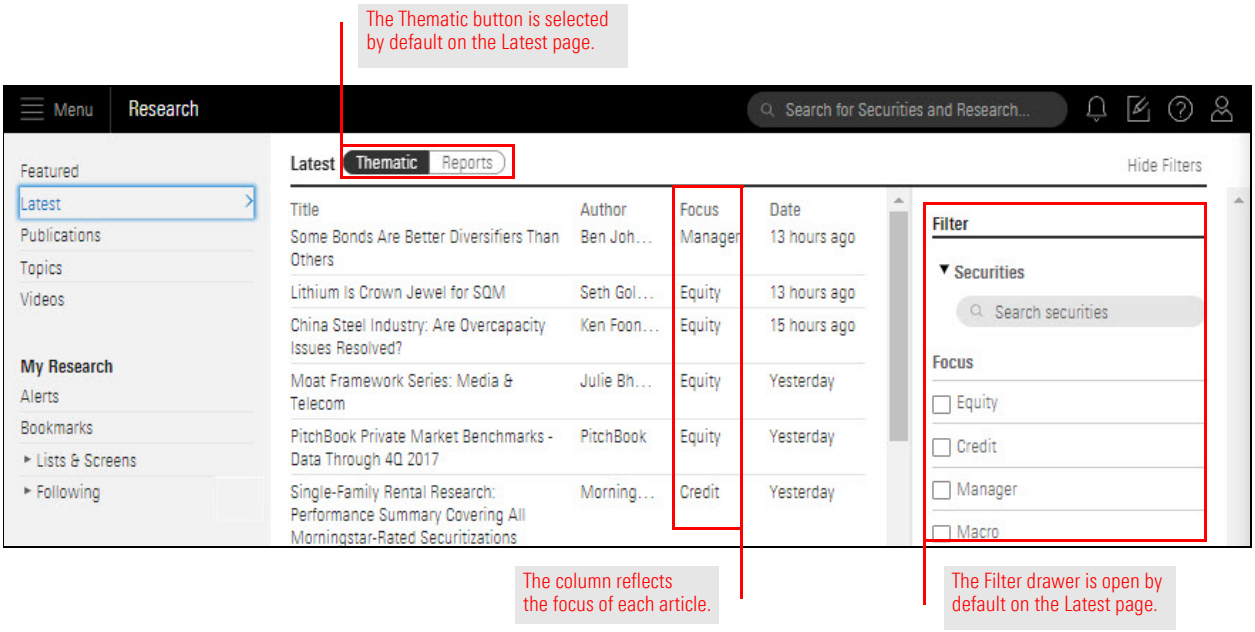
Using the Latest Page

Overview

The Latest page offers articles and reports from Morningstar's Research team. Here, you can see content listed thematically (meaning the articles cover a broad range of topics) or view reports particular to certain securities. On the toggle at the top of the Latest page, the Thematic button is selected by default. The Filter drawer to the right helps you eliminate articles you do not want to see.



In this section, you will learn how to do the following:

- filter content on the Latest page (page 20)
- create a bookmark (page 21)
- revisit a bookmark (page 22), and
- clear a bookmark (page 23).

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Exercise 6: See which securities are mentioned in an article on the Latest page

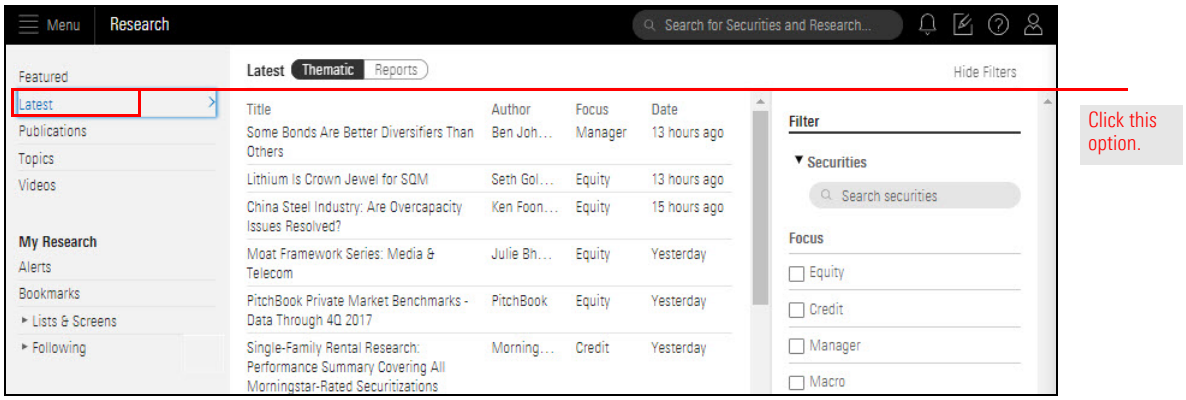
When the Reports button is selected on the Latest page, an additional column is seen for the tickers mentioned in a report. If the tickers cannot all be displayed in the Ticker column, an ellipsis (…) appears.

To see all securities mentioned in an article, do the following:

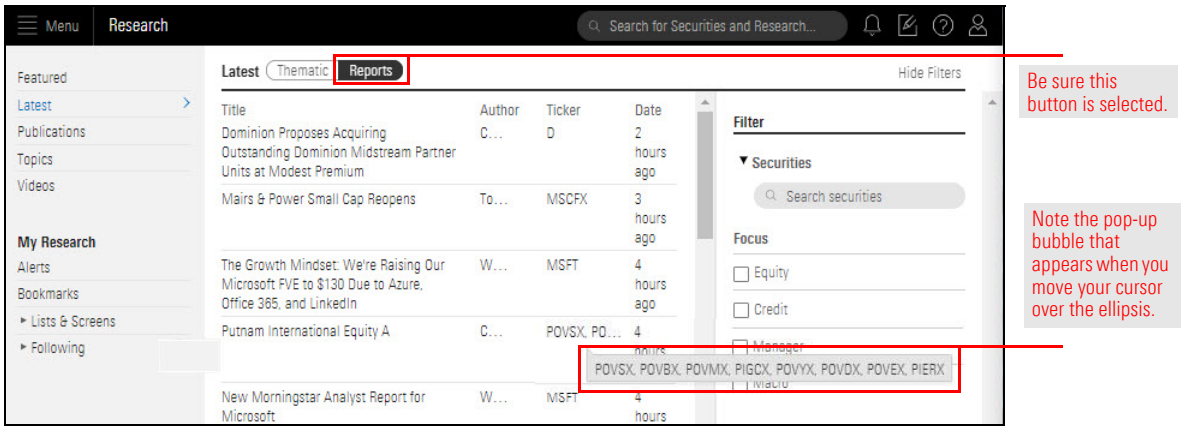
1. **Hover the cursor** over the **Menu**, then select **Morningstar Research**. The Morningstar Research area opens.

   ☞ Note: If the workbook from Exercise 5 is still open, an alert appears, asking if you want to save the workbook. Click **Don't save**.

2. From the navigation pane on the left, click **Latest**. The Latest page opens.



3. At the top of the Latest page, click the **Reports** button.
4. In the Ticker column, **hover the cursor** over an **ellipsis**. (You might have to scroll down to find one.) A pop-up bubble opens, displaying the tickers mentioned in the report.



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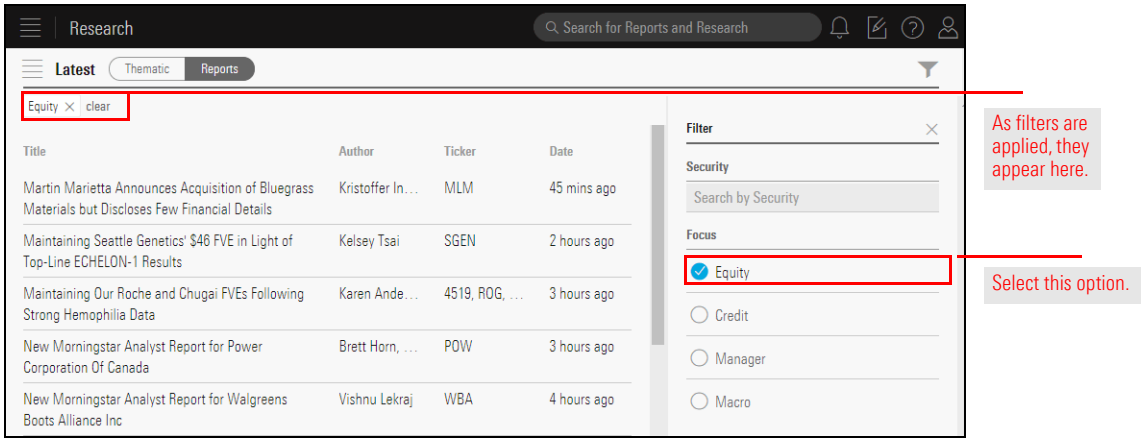
Exercise 7: Filter content on the Latest page

Rather than viewing all articles at once on the Latest page, or having to scroll through the articles to find the one you want, you can filter content by Focus or Security on either toggle option (Thematic or Reports).

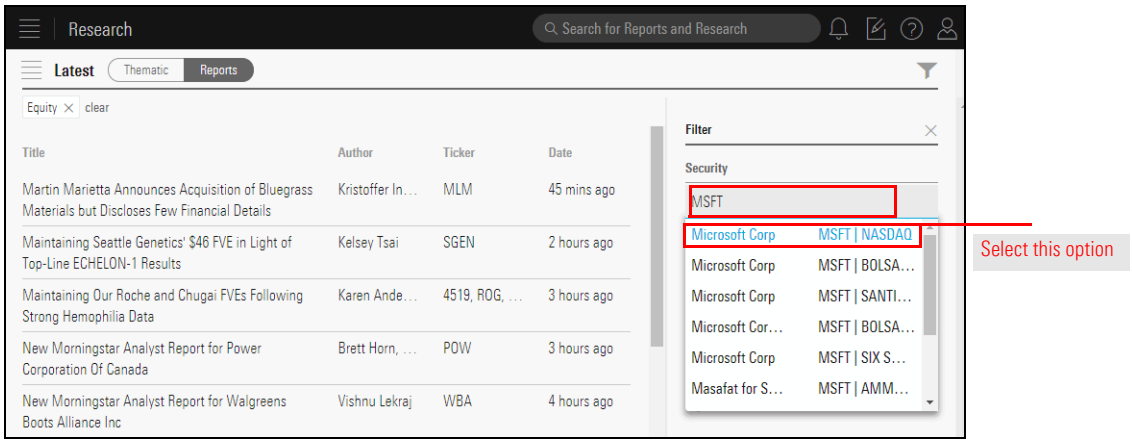
☞ Note: You can filter for multiple securities, but they can be added only one at a time.

To filter content on the Latest page, do the following:

1. Be sure the **Reports** toggle is selected.
2. In the Focus section of the Filter drawer, select **Equity**. The Equity label appears above the table of articles.



3. In the Filter drawer, in the **Security** field, type **MSFT**.
4. Click **Microsoft Corp MSFT|NASDAQ**. A label for Microsoft Corp is added to the area above the table of articles.



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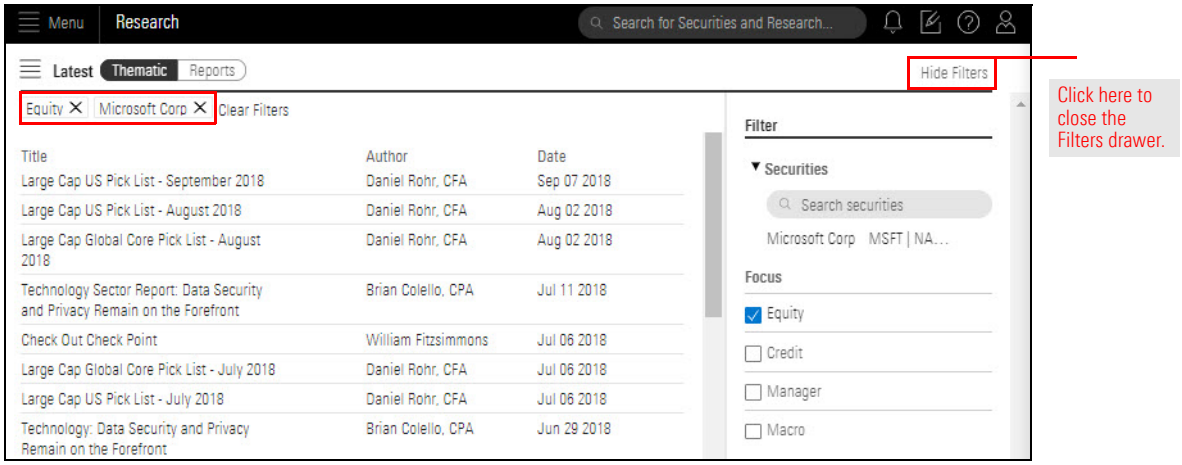
5. Click **Hide Filters** to close the drawer; the filtered selections remain active until you clear them.

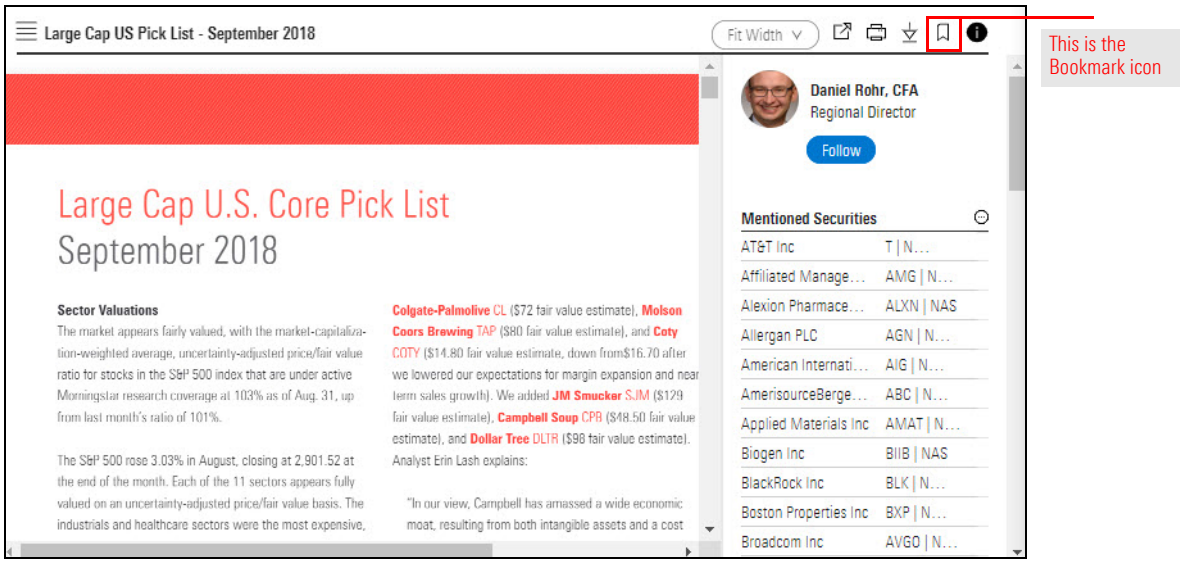


Exercise 8: Create a bookmark

If you start to read an article or watch a video, but are not able to finish it, you can bookmark it so you can easily return to it later. You can bookmark content from any Morningstar Research page.

To bookmark an article or video, do the following:

1. On a Research page, open an article or video by clicking its **name**.
2. In the upper-right corner of the page, click the **Bookmark** icon. Once selected, the icon shows a solid fill, to indicate that the content is bookmarked.



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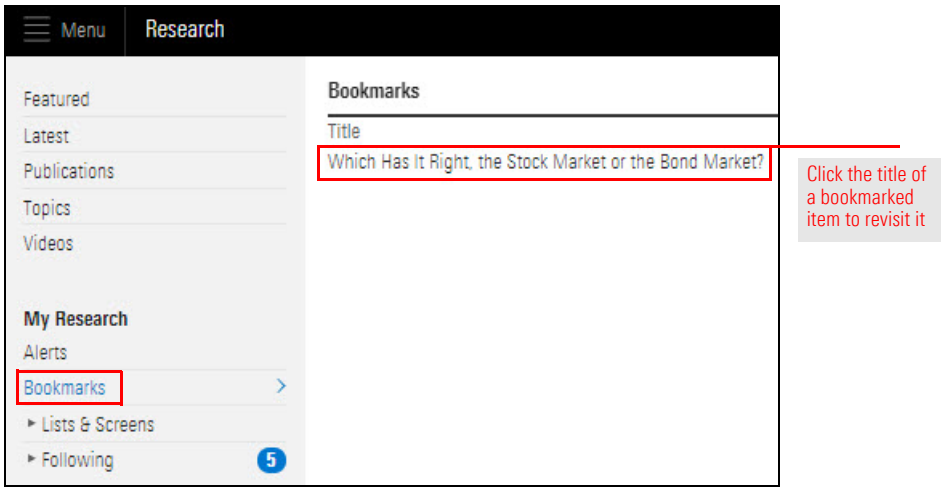
Exercise 9: Revisit a bookmarked item

To revisit an article or video you have bookmarked, do the following:

1. In the navigation pane on any Morningstar Research page, click **Bookmarked**. The Bookmarked page opens.
2. Click the **title** of the article or video you want to visit.



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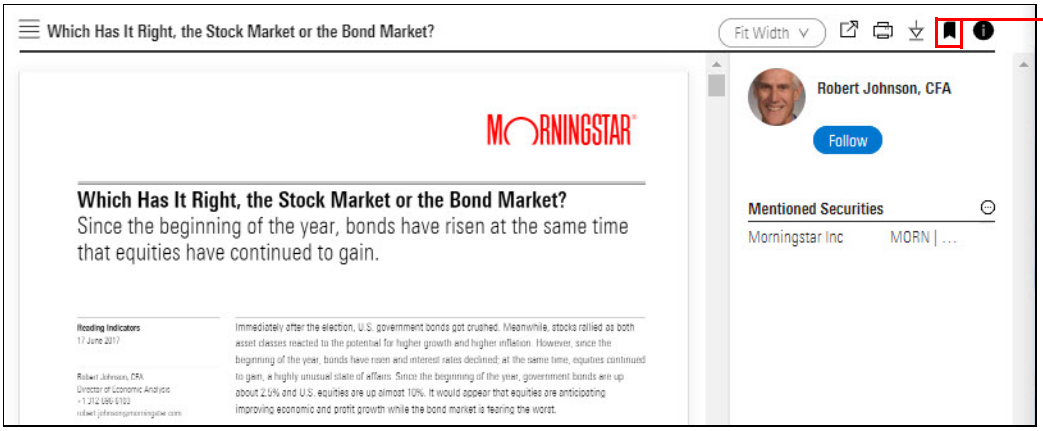
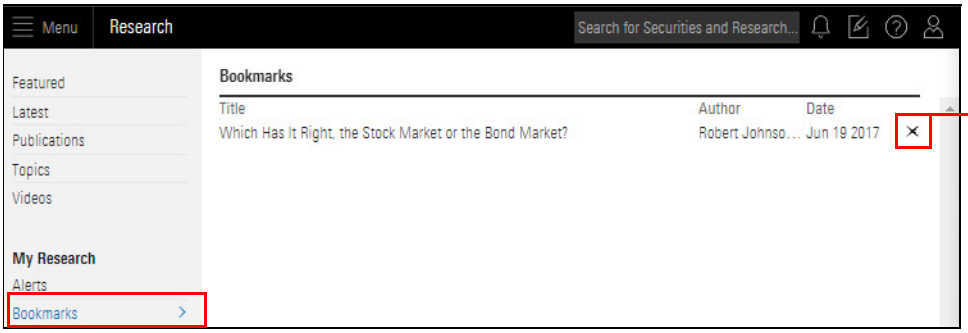
Exercise 10: Clear a bookmark

You can clear a bookmark in the following ways:

- At the top-right corner of the page of the bookmarked article or video, click the **Bookmark** icon. The icon changes to an unfilled state to indicate the item is no longer bookmarked; or
- In the navigation pane, click **Bookmarks** to display the list of bookmarks. Then, in the row for the bookmarked item, **hover the cursor** over the empty area to the right of the Date column. Click the **X** that appears.





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Using the Publications Page

Overview

The Publications page contains dozens of shortcuts to different types of content Morningstar publishes on a regular basis. For example, you can see the current and past copies of Morningstar's newsletters from the Publications page. Click any tile on the Publications page to see articles, reports, and videos related to the subject.

The Publications page offers content on broad subjects, such as the following:

- Credit
- Equity
- Macro
- Manager, and
- Multi-Focus.

You can filter content here, just as you did on the Latest page (Exercise 7 on page 20), and you can sort the publication tiles.

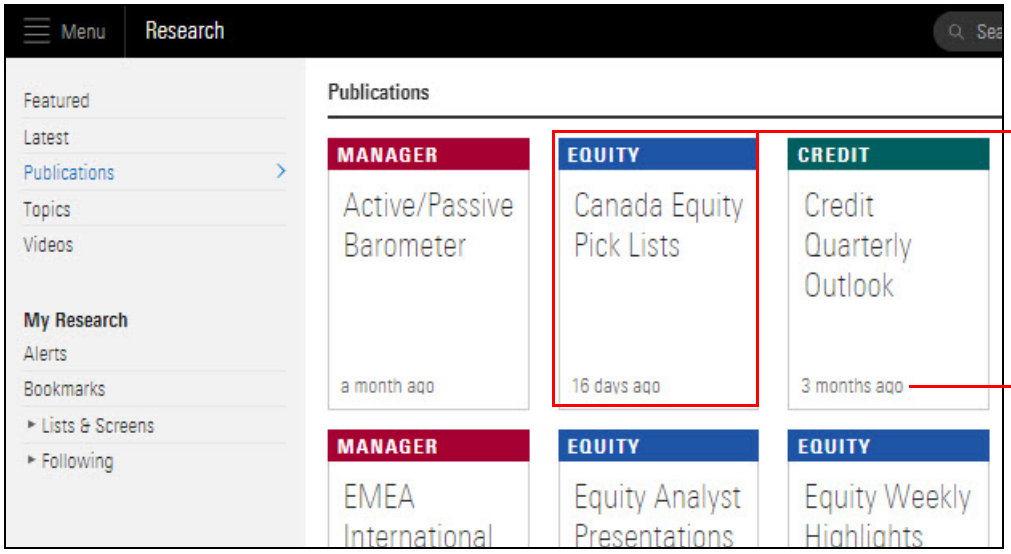
In this section, you will learn how to do the following:

- follow a publication (page 24)
- follow a publication (page 21)
- see the most recently updated content first (page 26)
- find the publications most recently added (page 27), and
- follow an author's writings (page 28).

Exercise 11: Follow a publication

Rather than checking the Publications page for new content on a daily or weekly basis, you can follow a publication and see a notation when new content is available for that area. To follow a publication, do the following:

1. From the navigation pane on any Morningstar Research page, click **Publications**. The Publications page opens.
2. Click a **publication** you want to follow. The publication's page opens.



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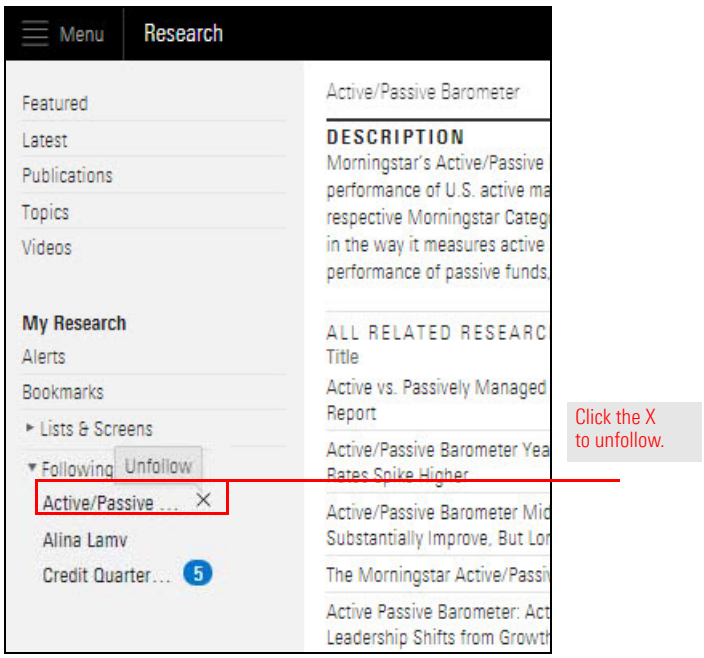
3. In the upper-right corner of the page, click the **Follow** button. The button changes to "Following," and the name of the subscription appears under the Following area in the navigation pane. Each time new content is available for that publication, a number appears to the right of the publication's name in the navigation pane.
4. To see the latest content for a publication you are following, in the navigation pane, under Following, click the **name** of the publication.

Exercise 12: Unfollow a publication

If a publication is no longer of interest, you can unfollow it by doing the following:

1. In the navigation pane, under Following, **hover the cursor** over the **name of the publication** you want to unfollow. An X appears to the right of the name.
2. Click the **X**. The item is removed from the Following list.



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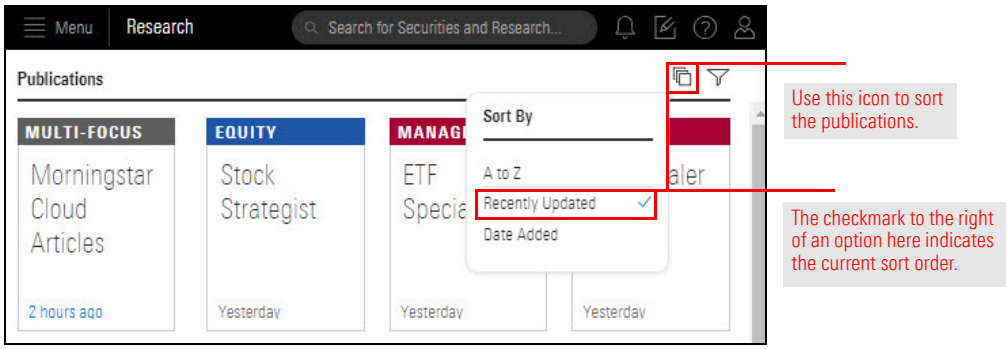
When viewing a publication, you can also click the **Following** button to unfollow it.

Exercise 13: See the most recently updated content first

To see which publication's content was updated most recently, and to move the most recently updated tiles to the top of the Publications page, do the following:

1. Make sure you are on the main **Publications** page.
2. In the upper-right corner of the window, click the **Sort** icon, then select **Recently Updated**. The window refreshes, and the publications with the most recent content appear at the top; note the time stamp at the bottom of each tile.



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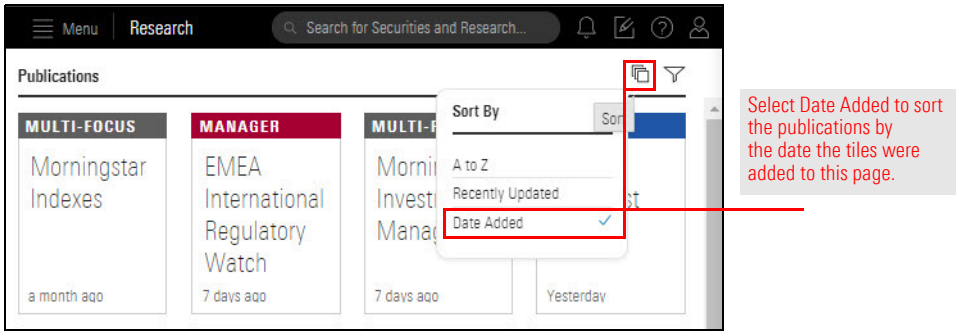
Exercise 14: Find the publications added most recently

In addition to being able to show publications with the newest content, you can also show the newest Publication tiles at the top of the page. Sorting in this way allows you to note what new subjects have been added to this page.

To see which publications have been added most recently, do the following:

1. Make sure you are on the main **Publications** page.
2. In the upper-right corner of the window, click the **Sort** icon, then select **Date Added**. The window refreshes, and the publications that have been added most recently appear at the top.

   ☞ Note: The date in each tile on the Publications page always indicates how recently its content was updated; it does not reflect when the tile was added to the Publications page.



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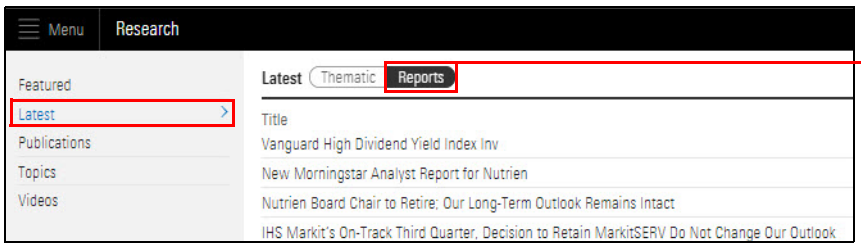
Exercise 15: Follow everything a certain author writes

In addition to favorite topics you like to keep up with, do you also have a favorite Morningstar author whose content appears in the Research area of Morningstar Office Cloud? If you are a fund manager whose fund is covered by a Morningstar analyst, you might like to know when that analyst posts an update about your fund. Just as you can follow a publication or topic, you can also follow an author's page.

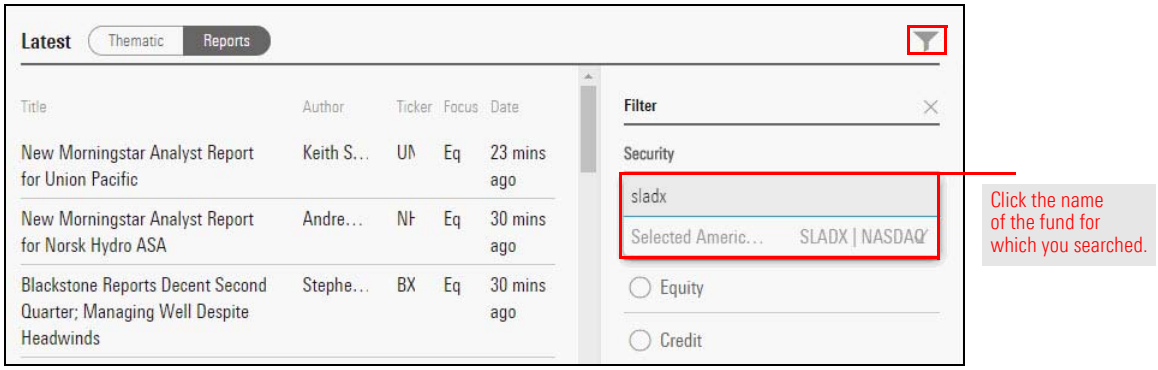
☞ Note: Not all authors have a page.

To follow an author, do the following:

1. Be sure the **Latest** page is selected.
2. On the toggle at the top of the page, click **Reports**.



3. In the **Security** field of the Filter drawer, enter **SLADX**. The list of reports now displays the reports mentioning that security.
4. Click the **name** of the fund when it appears.



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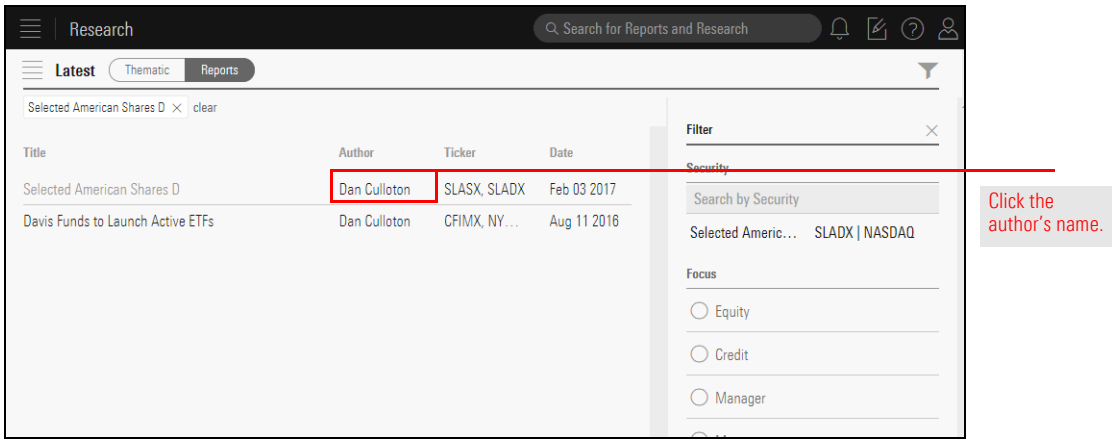
5. In the Author column, click the author's **name**. The author's page opens.

   ☞ Note: Whenever you see an author's name in a grid view or an article, you can click it to follow that person's content.



6. Click the **Follow** button. The author's name is added to the Following area in the navigation pane. Each time that person posts a new report, a number will appear to the right of the subscription's name.

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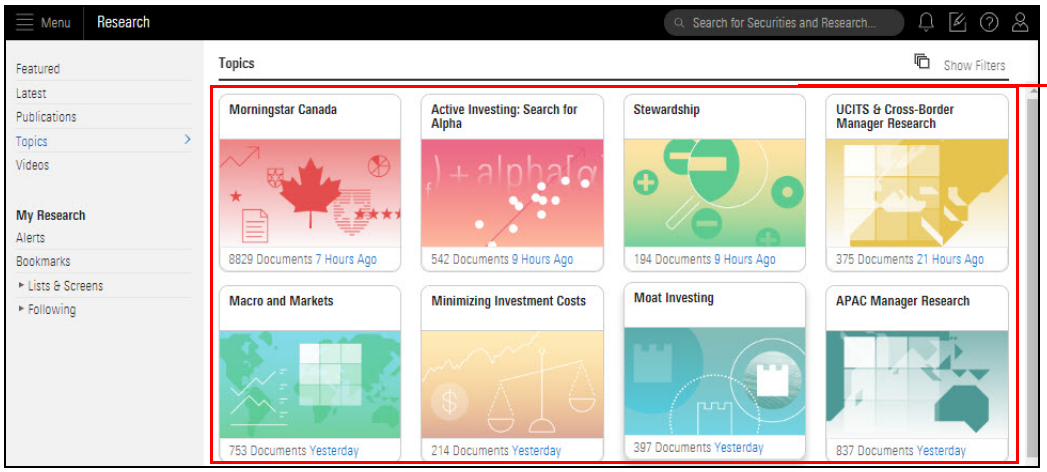
Using the Topics Page

Overview

The Topics page contains over a dozen shortcuts to content related to a wide range of subjects, from articles on asset flows to videos analyzing the impact of Brexit.

You can filter content here, just as you did on the Latest page, and you can sort the topic tiles as well.



Each tile shows you the number of articles or videos available, and when a topic was last updated.

In this section, you will learn to do the following:

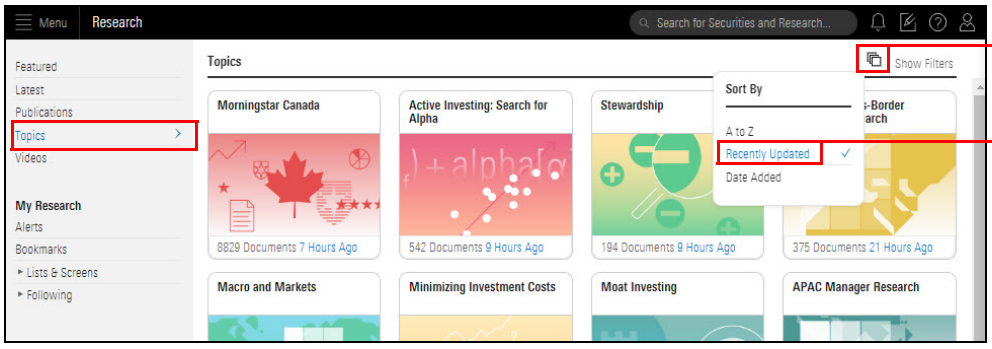
- view the most recently updated topics (page 30), and
- display the newest topics at the top of the Topics page (page 31).

Exercise 16: See which topics were updated most recently

The tiles on the Topics page are displayed according to the last sort option you selected for that page.

To display the topics with the most recent updates at the top of the Topics page, do the following:

1. In the navigation pane, click **Topics**.
2. In the upper-right corner of the window, click the **Sort** icon, then select **Recently Updated**. The window refreshes, and the tiles with the most recent content appear at the top.



Use this icon to sort the topics.

Select this option.

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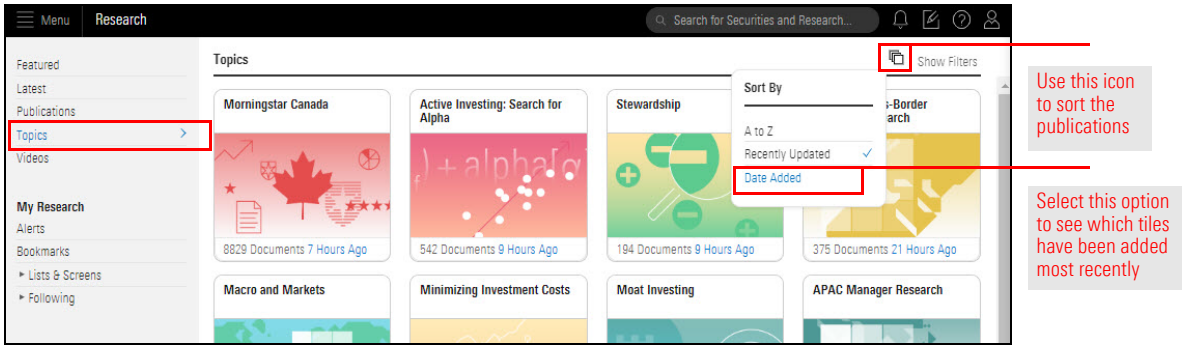
Exercise 17: Display the newest topics at the top of the Topics page

In addition to seeing which topic has the newest content, you can also see which Topic tiles have been added most recently. Sorting in this way allows you to note new areas of interest added to this page.

To see which topics have been added most recently, do the following:

1. Make sure you are on the main **Topics** page.
2. In the upper-right corner of the window, click the **Sort** icon, then select **Date Added**. The window refreshes, and the topics that have been added most recently appear at the top.

   ☞ Note: The date in each tile on the Topics page always indicates how recently its content was updated; it does not reflect when the tile was added to the Topics page.



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Using My Research

Overview

In this guide, you've already learned how to use the Bookmarks and Following options under My Research in the navigation pane. The other options in My Research—Alerts and Lists & Screens—are discussed here.

In this section, you will learn about the following:

- create a list and see related Morningstar Research (page 32)
- use the Research area to create and manage Morningstar Manager Research alerts (page 34)
- the notification options in a Morningstar Manager Research alert (page 34)
- create a Morningstar Manager Research alert (page 35)
- modify a Morningstar Manager Research alert (page 38), and
- view multiple Morningstar Manager Research alerts in a daily or weekly email (page 39).

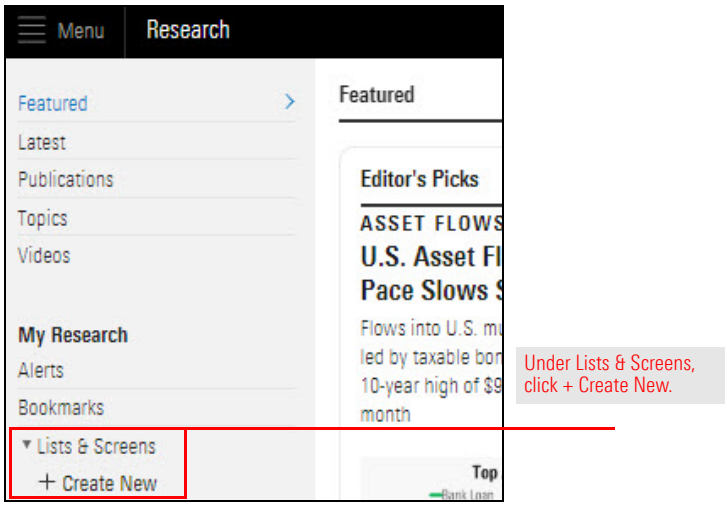
Exercise 18: Create a list and see related Morningstar Research

To create a list and see all articles related to the investments in the list, do the following:

1. On the navigation pane, click **Lists & Screens** to expand it. All your saved lists and screens appear.

   ☞ Note: Be sure to click Lists & Screens on the Research navigation pane, not Lists & Screens on the Menu.

2. Click **+ Create New**. The Create New List dialog box opens.



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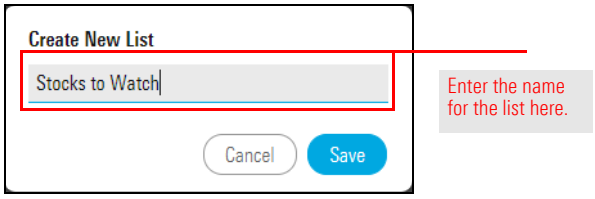
3. In the name field, enter **Stocks to Watch**, then click **Save**. A new page (Stocks to Watch) opens with the Edit List drawer is open on the right.

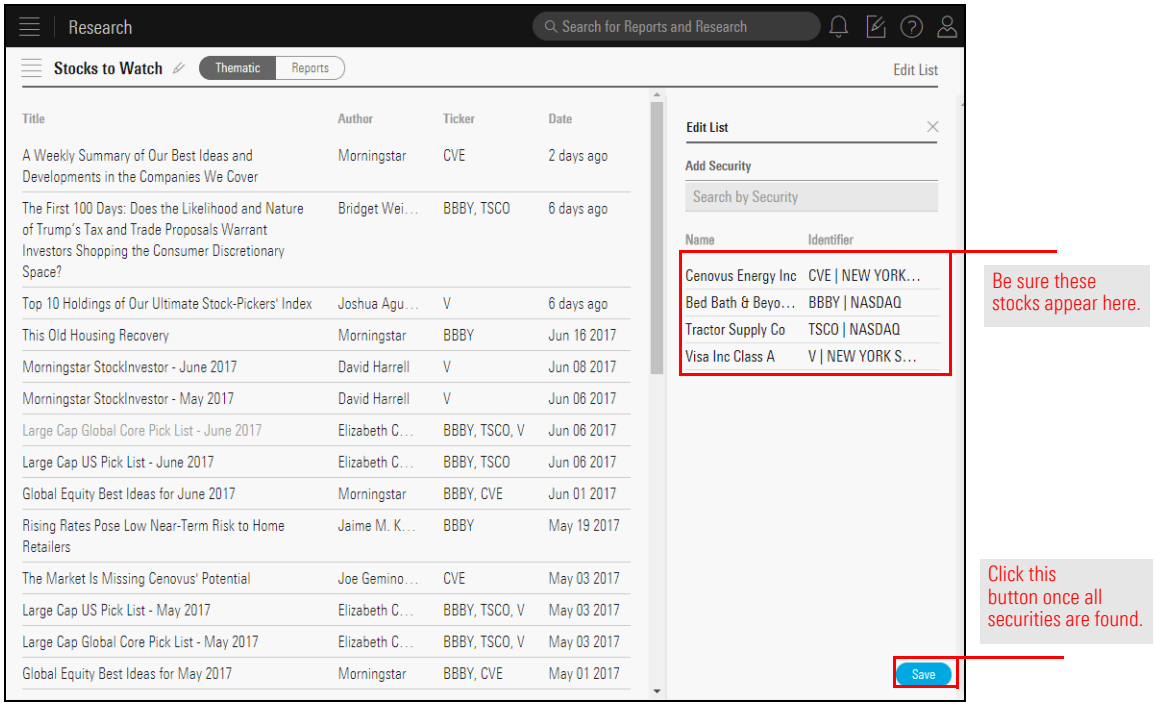


4. In the Edit List drawer, in the **Add Security** field, enter the following **ticker symbols**, then click **each one** as it appears (articles related to the securities automatically load as you add them to the list):

   ☞ Note: You can add these only one at a time; they cannot be added all at once as you can when creating a list in an investment workbook.

   - CVE
   - BBBY
   - TSCO
   - V

5. In the bottom-right corner of the Edit List drawer, click **Save**. A message opens, confirming the securities were saved. In the future, simply click the list name in the navigation pane to see the latest articles and videos related to the securities.



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How can I use the Research area to create a Morningstar Manager Research alert?

In this section, you will learn how to create and modify a Morningstar Manager Research alert from within the Research area. This is the only alert type you can set from the Research page.

What are the notification options in a Morningstar Manager Research alert?

If you subscribe to a Morningstar Manager Research alert, you are notified when Morningstar analysts release new research mentioning your tagged securities or lists. You can select how often you want to receive an alert notification and how you want the alert notification to be delivered—in the application or in your email. The details are described in this table:

Delivery Method	Notification Frequency
Office Cloud	Immediately: Receive an alert notification as soon as the information is published.
	Daily: Receive only one notification a day. A daily notification might include multiple alerts.
Email For more information about email alerts, see How can I view multiple Morningstar Manager Research alerts from a daily or weekly email? on page 39. ☞ Note: The email comes from MorningstarOfficeNotifications.	Immediately: Receive an alert notification as soon as the information is published.
	Daily: Receive only one notification a day. A daily notification might include multiple alerts.
	Weekly: Receive only one notification a week. A weekly notification might include multiple alerts.

Keep the following in mind when selecting daily or weekly notifications:

- Daily notifications are sent at 6 a.m. (Chicago time) and only when one or more alerts have been triggered in the previous 24 hours.
- Weekly notifications are sent on Thursdays at 10 a.m. (Chicago time) and only when one or more alerts have been triggered in the previous seven days, and
- If an alert has not been triggered during the time period, you will not receive a notification.

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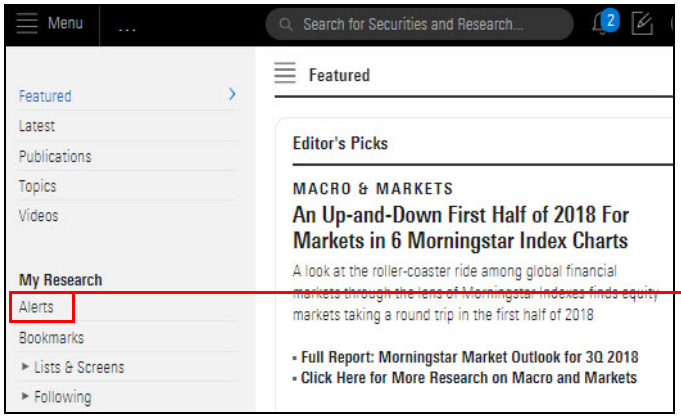
Exercise 19: Create a Morningstar Manager Research alert

A Morningstar Manager Research alert notifies you when Morningstar analysts release new research mentioning your tagged securities or lists. You can also decide how frequently to receive the alert notifications.

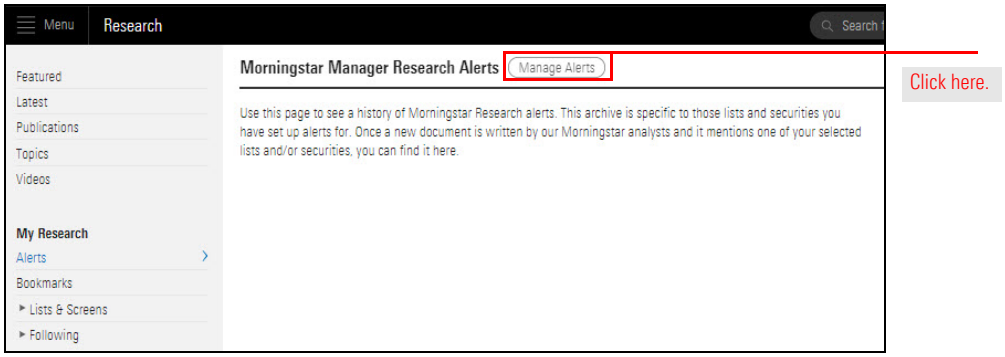
To create a Morningstar Manager Research alert in the Research area, do the following:

1. In the Research navigation pane, under My Research, select **Alerts**. The Morningstar Manager Research Alerts page opens.



2. Click **Manage Alerts**. The Edit Alerts window opens.

   ☞ Note: When one of your Morningstar Manager Research alerts is triggered, it is shown here in addition to being displayed in the Notifications pane.



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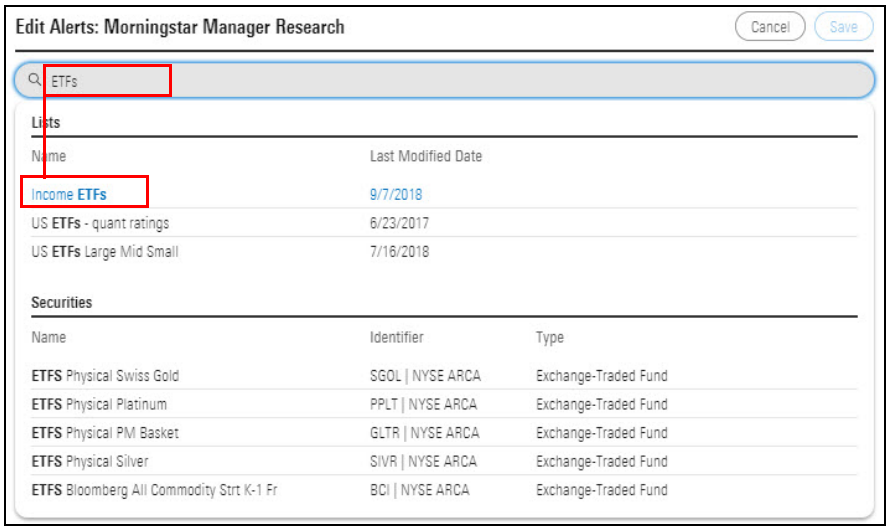
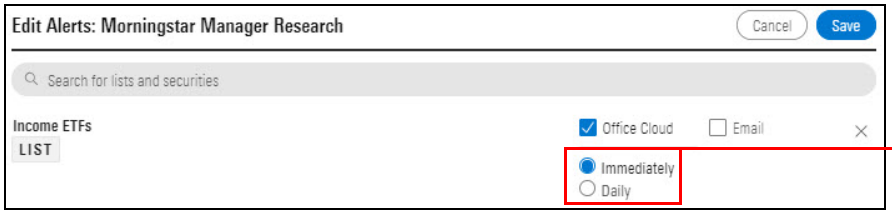
3. In the **Search for lists and securities** field, enter the **name** of one of your lists or securities (or a keyword in the name).
4. From the search results, select a **list** or **security**. A new Edit Alerts dialog box opens.



Note the highlighted selections.

5. Select the delivery method for the alert (**Office** Cloud and/or **Email**).
6. Select the frequency of the deliveries. If you want to receive notifications in the application, leave **Office Cloud** selected and do one of the following:
   - To receive an alert notification as soon as the information is published, leave **Immediately** selected, or
   - To receive only one notification a day (which may include multiple alerts), select **Daily**.

☞ Note: To learn more about the notification options, read What are the notification options in a Morningstar Manager Research alert? on page 34.



Morningstar Manager Research is the only alert type offering these options.

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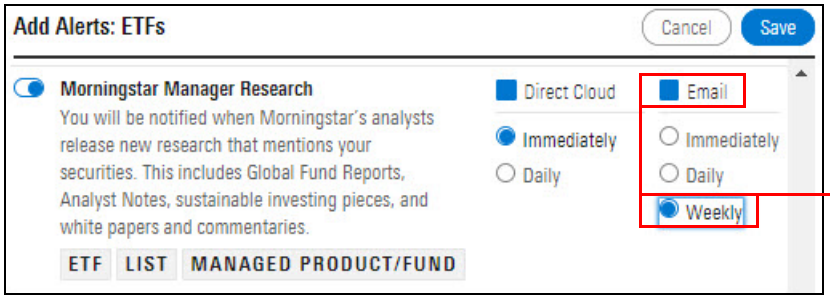
7. If you want to receive notifications via email, select **Email**. With email delivery, you have the additional option to receive weekly notifications. Do one of the following:
   - To receive an alert notification email as soon as the information is published, select **Immediately**
   - To receive only one notification email a day (which may include multiple alerts), leave **Daily** selected, or
   - To receive only one notification email a week (which may include multiple alerts), select **Weekly**.

   ☞ Note: To learn more about the notification options, read What are the notification options in a Morningstar Manager Research alert? on page 34.



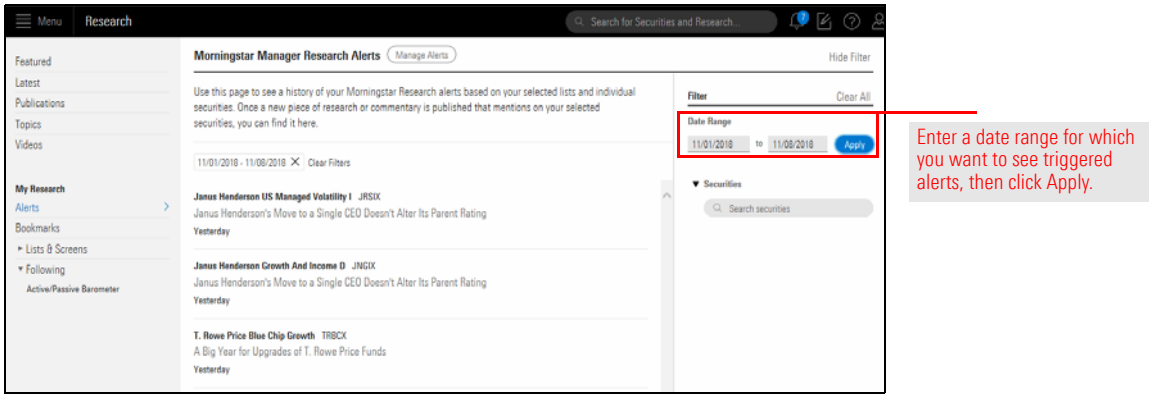
8. Click **Save**. An message opens, notifying you that the alert has been saved.

Exercise 20: Find Manager Research alerts for a specific date range

As you monitor more and more lists for Manager Research content, the number of alerts triggered will grow significantly over time. To help you better manage this content, use the Filter panel on the Morningstar Manager Research Alerts page. The options here allow you to find alerts triggered either within a certain date range, or for specific securities.

Do the following:

1. You should be on the **Alerts** page in the Morningstar Research area.
2. In the **Date Range** fields, enter a start date and end date for when an alert was triggered.
3. Click **Apply**. Only those alerts triggered during the date range you defined now show.



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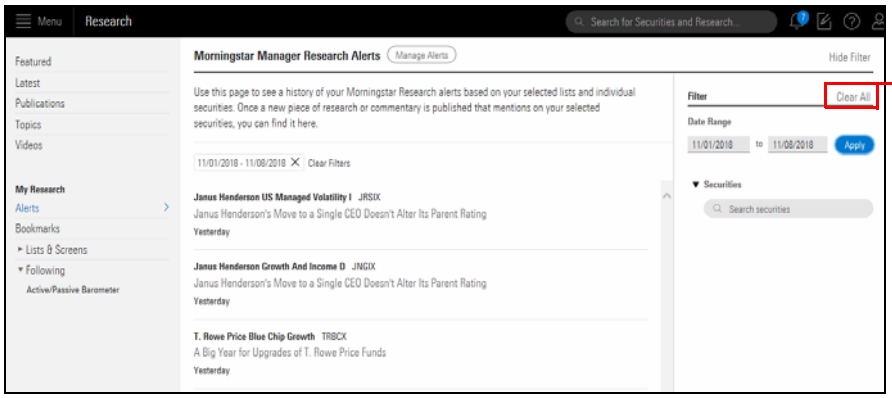
4. To search for alerts specific to a particular security, type the security's name or identifier in the **Search securities** field, then select its name when it appears.
5. To return to seeing all alerts, click **Clear All**.

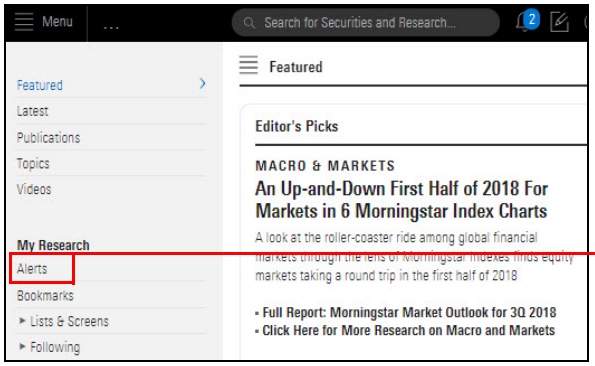


Exercise 21: Modify a Morningstar Manager Research alert

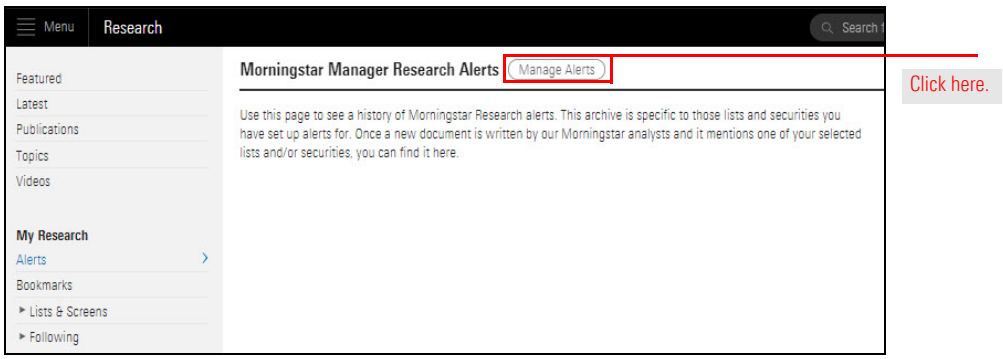
Modifying a Morningstar Manager Research alert in the Research area is very similar to modifying an alert on the main Alerts page (accessible from the Menu).

Do the following:

1. On the Morningstar Research page, in the navigation pane, under My Research, select **Alerts**. The Morningstar Manager Research Alerts page opens.



2. Click **Manage Alerts**. The Edit Alerts window opens, displaying your Morningstar Manager Research alerts.



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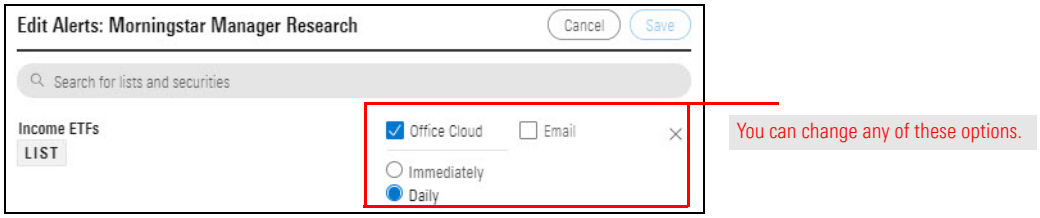
3. In any listed Morningstar Manager Research alert, you can change the delivery method(s), change the delivery frequency, or click the **X** to delete the alert.



4. Click **Save**. An message opens, notifying you that the alert has been saved.

   ☞ Note: Keep in mind that other alert capabilities (described in Setting Alerts) also apply to Morningstar Manager Research alerts; however, they cannot be edited from within the Research area.

How can I view multiple Morningstar Manager Research alerts from a daily or weekly email?

If you have selected Daily or Weekly email notifications, and multiple alerts have been triggered, the email contains only a single document. In that document, you find a link to each triggered alert. You must click each link to view an individual alert.

You can also access all the alerts at once. The email contains a "Click here" link to the Alerts page in the Morningstar Research area. By clicking that link, you can view all your triggered Morningstar Manager Research alerts together.

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Accessing Morningstar Research from an Investment Workbook

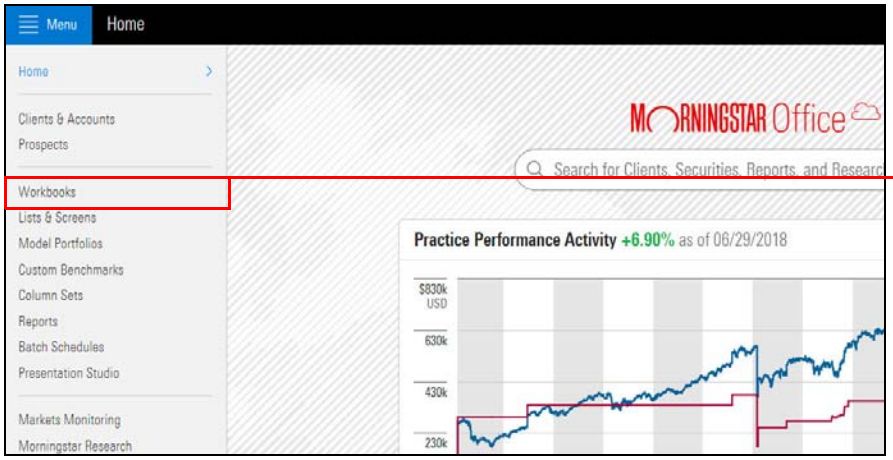
Overview

Morningstar Research can be accessed outside of the Research area. In this section, you will learn how to access Morningstar Research from an investment workbook.

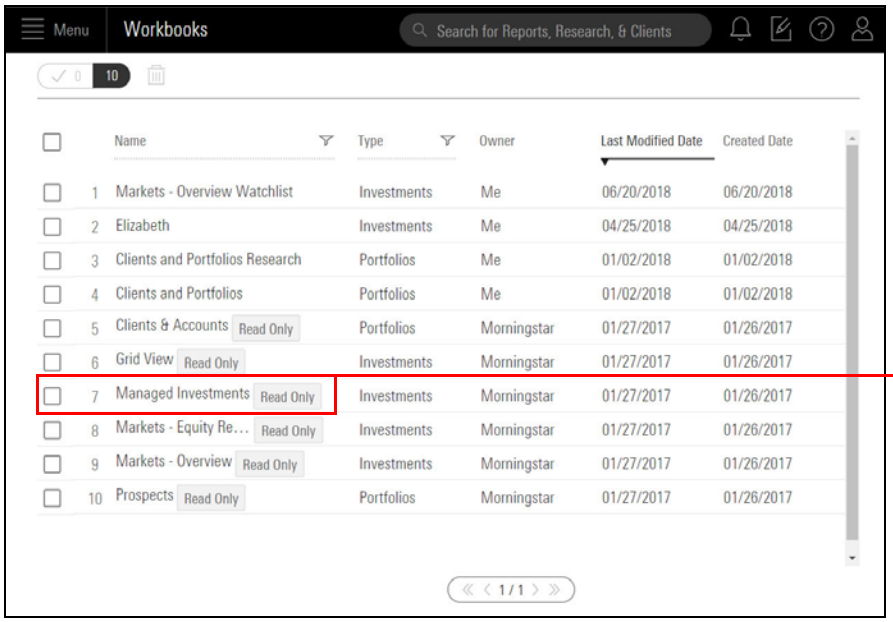
Exercise 22: View Morningstar Research in an investment workbook

By using the Analyst Research component in an investment workbook, you can quickly view the current articles about a specific investment or list. To access Morningstar Research from an investment workbook, do the following:

1. From the **Menu**, select **Workbooks.** A dialog box opens.



1. From the **Workbooks** page, open a saved **investment list** in the **Manged Investments** workbook.



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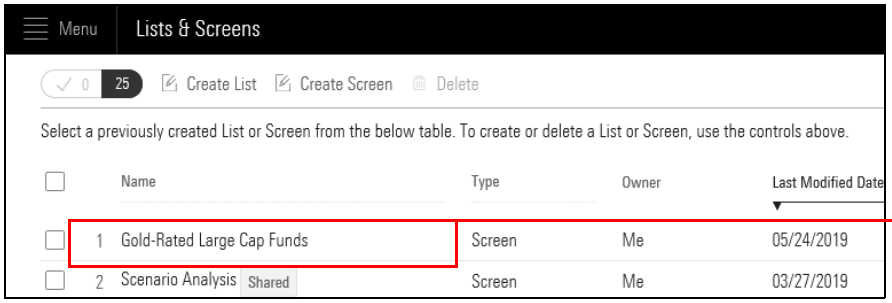
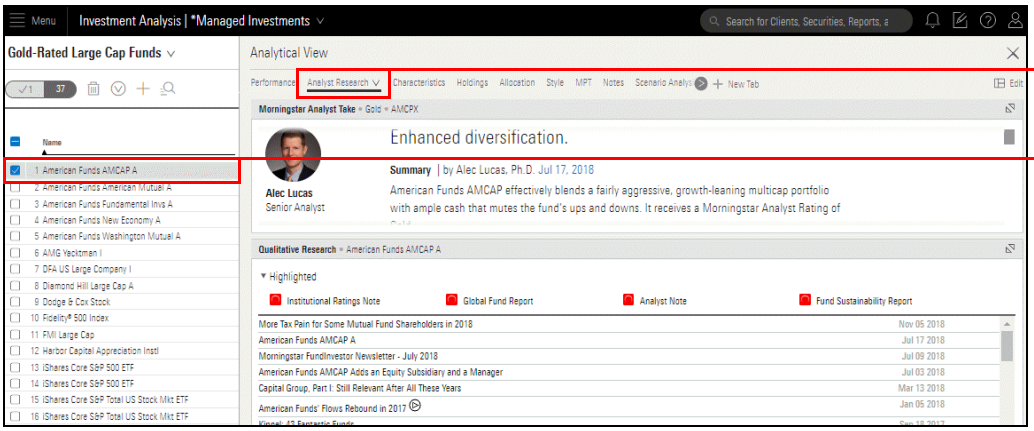
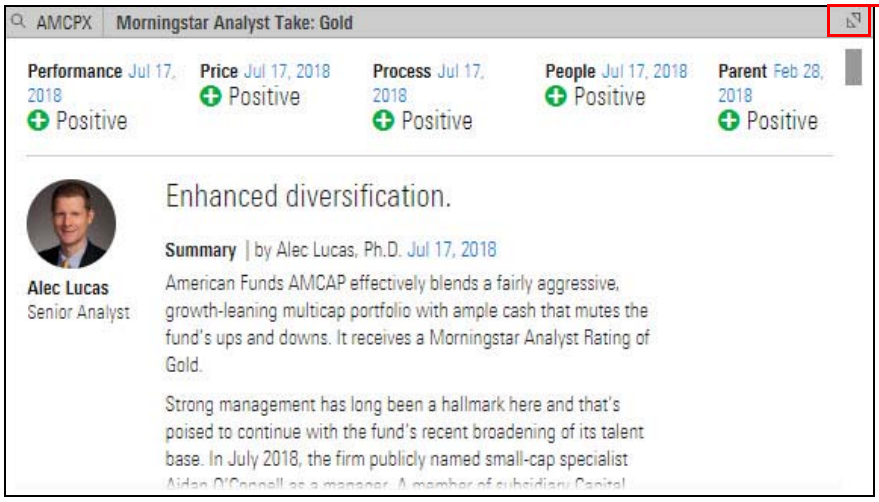
2. Select a **List** or **Screen.**



3. In the workbook, click on the **investment** you want view research for. The Analytical View opens.



4. In the Morningstar Analyst Take component, **scroll down** or **expand** the component read the Morningstar analyst take on the fund.



5. In the Morningstar Research component, if **Highlighted** is not expanded, click the Expand icon. You can **view** any of the following with a click:

   - report
   - note

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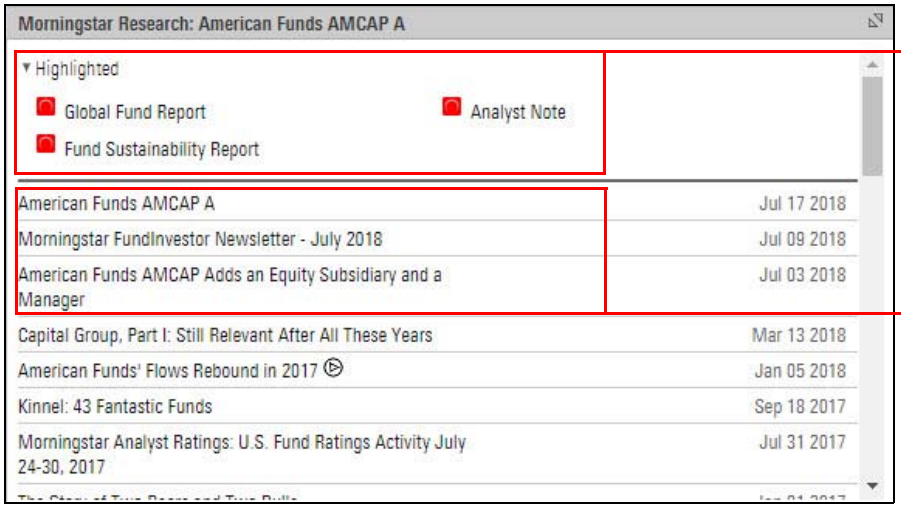
- article, or
- video.



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