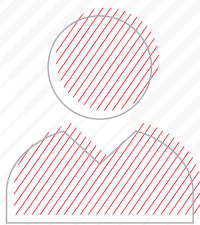
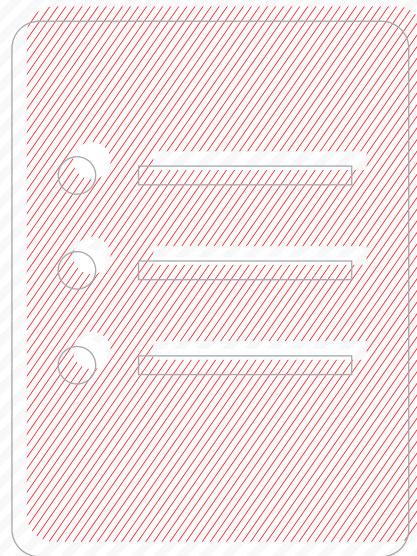
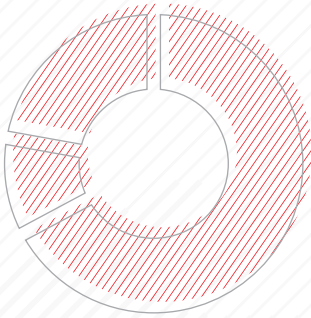
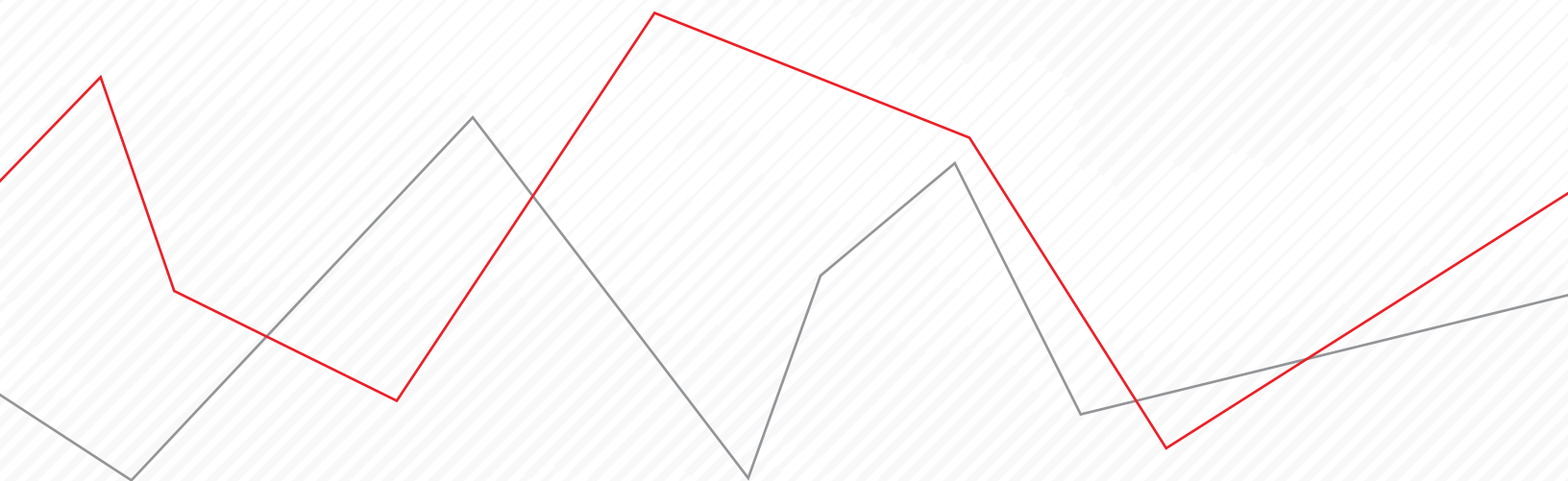


Leveraging Morningstar Research

Morningstar OfficeSM Cloud



MORNINGSTAR Office



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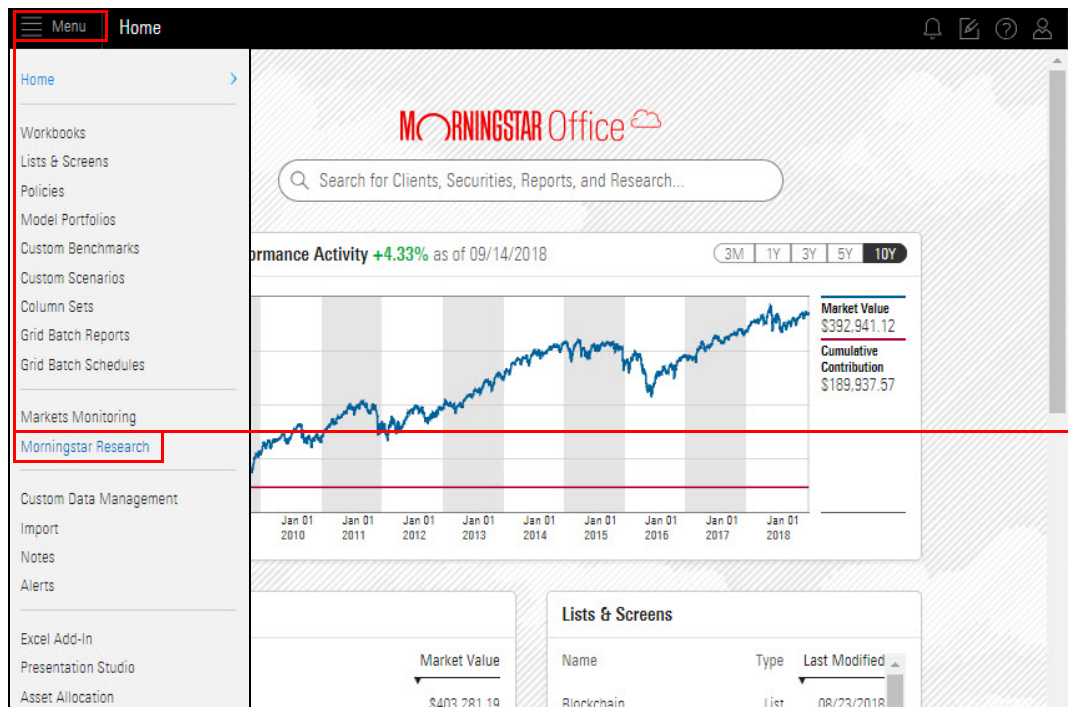
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Leveraging Morningstar Research

This workbook shows you how to take advantage of the Morningstar Research area of Morningstar OfficeSM 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.

Overview



This manual covers the following topics:

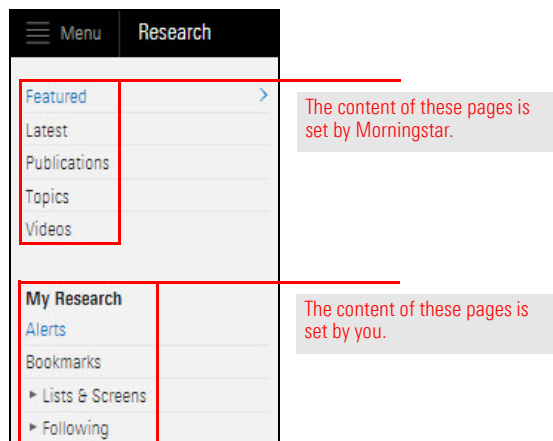
- ▶
- ▶ [Using the Featured Page \(page 6\)](#)
- ▶ [Using the Latest Page \(page 18\)](#)
- ▶ [Using the Publications Page \(page 24\)](#)
- ▶ [Using the Topics Page \(page 30\)](#)
- ▶ [Using My Research \(page 32\)](#)
- ▶ [Accessing Morningstar Research from an Investment Workbook \(page 40\)](#)

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.

Using the Featured Page

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.

Overview

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](#)).

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.

What content does the Featured page show?

The screenshot shows the Morningstar Research interface. The 'Featured' tab is highlighted in the sidebar. The main content area displays several articles, including 'August U.S. Fund Return Snapshot: It's All About Small Growth' and 'Morningstar Fund Family 150 - Comparing The Largest U.S. Fund Families'. A red box highlights the 'Featured' tab, and a red line points from it to a callout box on the right.

Editor's Picks

MACRO AND MARKETS

August U.S. Fund Return Snapshot: It's All About Small Growth

While there's still nearly four months left in 2018, for U.S. mutual fund investors, it's shaping up to be the year of small growth funds.

MANAGER RESEARCH

Morningstar Fund Family 150 - Comparing The Largest U.S. Fund Families

A semi-annual comparison of the largest 150 U.S. fund families, combining qualitative analysis from Morningstar's manager research group with data-driven analysis from our Due Diligence Scorecards

ASSET FLOWS

August Sees 10 U.S. Fund Rating Upgrades

Morningstar manager research analysts upgraded the ratings of 10 funds, downgraded the ratings of three funds, placed one fund's rating under review, and assigned new ratings to five funds

What's New

Thematic Reports

Our Ultimate Stock-Pickers' Top 10 Dividend-Yielding Stocks

U.S. Open-End Fund & ETF Rating Activity, Sept. 10 - 16, 2018

Corporate Credit Spreads Snap Tighter

Analytics Point to a New Direction for Publishers

What's the Hubbub With BBB Bonds?

We See Plenty of Upside in Bemis

How Long Can a Factor-Based Portfolio Underperform?

Nine and Fairfax Muscle Up to

The content on the Featured page is updated daily.

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 screenshot shows the Morningstar Research interface. On the left is a 'Menu' sidebar with options like 'Featured', 'Latest', 'Publications', 'Topics', 'Videos', 'My Research', 'Alerts', 'Bookmarks', and 'Following'. The main content area is titled 'Research' and features a 'Featured' section. This section includes a 'Highlighted' list of articles with authors and a 'Highlighted Topics' section with three cards: 'Advisor Practice Management', 'Exchange-Traded Products', and 'Macro and Markets'. A red box highlights the 'Featured' section. A red callout box on the right states: 'The Featured page also offers access to the top content from a number of other pages in the Research area.'

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 screenshot shows the Morningstar Office interface. On the left is a 'Menu' sidebar with options like 'Home', 'Workbooks', 'Lists & Screens', 'Policies', 'Model Portfolios', 'Custom Benchmarks', 'Custom Scenarios', 'Column Sets', 'Grid Batch Reports', 'Grid Batch Schedules', 'Markets Monitoring', 'Morningstar Research', 'Custom Data Management', 'Import', 'Notes', 'Alerts', 'Excel Add-In', 'Presentation Studio', and 'Asset Allocation'. The main content area is titled 'MORNINGSTAR Office' and features a search bar and a performance chart for 'Performance Activity +4.33% as of 09/14/2018'. A red box highlights the 'Morningstar Research' menu item. A red callout box on the right states: 'The Morningstar Research area offers links to a wealth of content from Morningstar analysts.'

- 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.

The screenshot shows the Morningstar Research interface. On the left is a navigation menu with options like 'Featured', 'Latest', 'Publications', 'Topics', 'Videos', 'My Research', 'Alerts', 'Bookmarks', 'Lists & Screens', and 'Following'. The main content area is titled 'Featured' and includes sections for 'Editor's Picks', 'MANAGER RESEARCH', and 'ASSET FLOWS'. A red box highlights the 'What's New' section on the right, which has two tabs: 'Thematic' and 'Reports'. The 'Reports' tab is selected. Below the tabs, a list of reports is shown, including 'Principal SAM Conservative Growth A', 'Principal SAM Conservative Bal A', 'Principal SAM Flexible Income A', 'Principal SAM Strategic Growth A', 'Room for Constructive Compromise in CMS Energy Electric Rate Case', 'New Morningstar Analyst Report for CMS Energy Corp', 'New Morningstar Analyst Report for DowDuPont', and 'DowDuPont Announces'. A red arrow points from a text box to the 'Reports' toggle. Another red box highlights a bar chart in the 'Editor's Picks' section, with a text box explaining that clicking the image will enlarge it.

When you see an image on an HTML page, such as this one, you can click the image to enlarge it and make it easier to read.

Use this toggle to list the most popular content from the past seven days.

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.

Exercise 2: Search for content

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.

The screenshot shows the Morningstar Research website with a search bar at the top containing the text "DOL fiduciary". Below the search bar, a "SECURITIES" section displays "No results". To the right of the search bar, a "7 MORE >" link is visible. Below the "SECURITIES" section, a "MORNINGSTAR RESEARCH" section lists several articles, including "Robo Advice: Installing a Program for Profitability with Digital Advice" and "The SEC's Regulation Best Interest May Not Be What the Financial Sector Wished For". A "HELP" section is also visible, listing "Following a Publication, Topic or Author in Morningstar Research" and "Accessing Analyst Content on the Cloud Platform".

Searching for **DOL Fiduciary** shows a list of related Research articles, but no securities.

Click here to display a full set of results.

This area of the search results shows help content from the Morningstar Community.

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

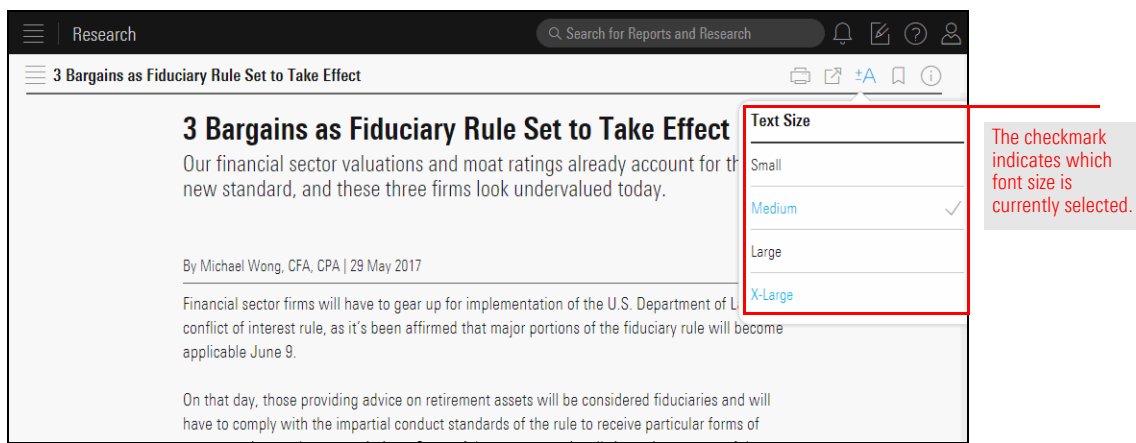
If you find the font size for reports difficult to read, you can easily increase the size of the text on the screen by doing the following:

Exercise 3: Make an article easier to read

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.

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.

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

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**.

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.

Exercise 5: Build a list from a Research page

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.

The screenshot shows the Morningstar Research interface with a search bar at the top containing the word 'blockchain'. Below the search bar, there are three sections: 'SECURITIES', 'MORNINGSTAR RESEARCH', and 'HELP'. The 'SECURITIES' section lists three items: 'Blockchain Industries Inc' (BCII, OTC MARKETS), 'Blockchain Power Trust' (TNSTF, OTC GREY MARKET), and 'Blockchain Solutions Inc' (BLOS, OTC MARKETS). The 'MORNINGSTAR RESEARCH' section has a '7 MORE >' link highlighted with a red box. The 'HELP' section shows 'No results'.

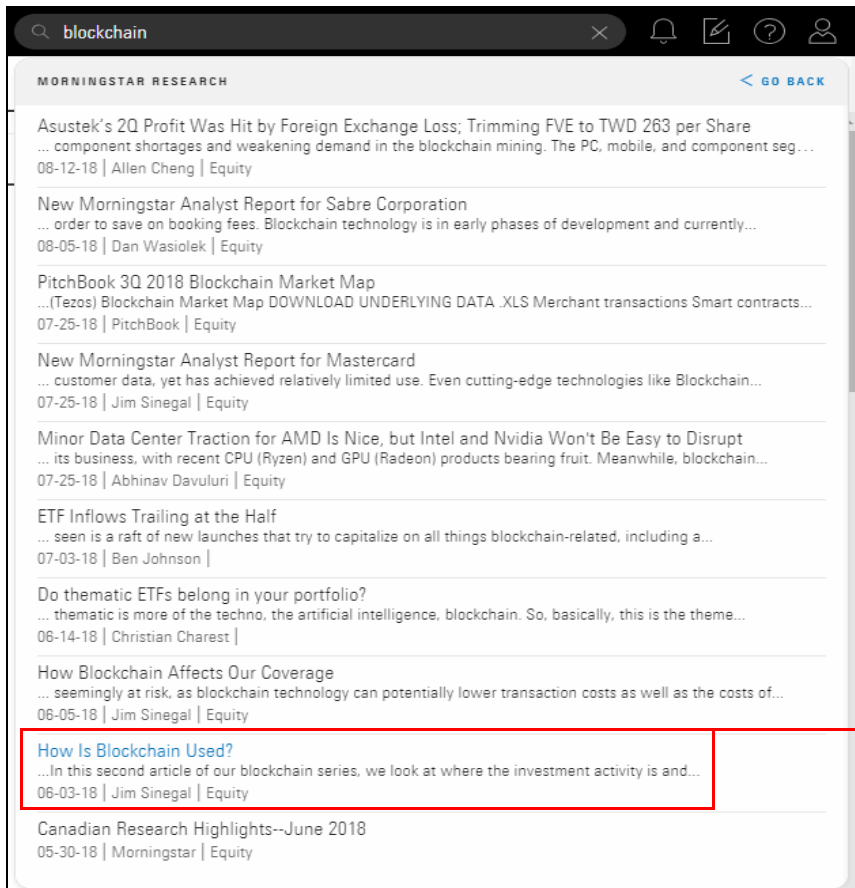
SECURITIES		
Blockchain Industries Inc	BCII	OTC MARKETS
Blockchain Power Trust	TNSTF	OTC GREY MARKET
Blockchain Solutions Inc	BLOS	OTC MARKETS

MORNINGSTAR RESEARCH
A Weekly Summary of Our Best Ideas and Developments in the Companies We Cover ... blockchain were explored. Amid the growing hype, some even floated the idea that cry... 08-16-18 Morningstar Equity
New Morningstar Analyst Report for ASX Limited ... exclude the potential impacts from our forecasts. Technological disruption (from things ... 08-15-18 Gareth James Equity
New Morningstar Analyst Report for Computershare Limited ... as blockchain , but we expect the company to leverage its leading market position and r... 08-14-18 Gareth James Equity

HELP
No results

Click here to display more articles about blockchain

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



The screenshot shows a search results page for 'blockchain' on the Morningstar Research platform. The page lists several articles. The article 'How Is Blockchain Used?' by Jim Sinegal, dated 06-03-18, is highlighted with a red box. A red arrow points from a text box labeled 'Click an article.' to this highlighted article.

blockchain

MORNINGSTAR RESEARCH < GO BACK

Asustek's 2Q Profit Was Hit by Foreign Exchange Loss; Trimming FVE to TWD 263 per Share
... component shortages and weakening demand in the blockchain mining. The PC, mobile, and component seg...
08-12-18 | Allen Cheng | Equity

New Morningstar Analyst Report for Sabre Corporation
... order to save on booking fees. Blockchain technology is in early phases of development and currently...
08-05-18 | Dan Wasiolek | Equity

PitchBook 3Q 2018 Blockchain Market Map
...(Tezos) Blockchain Market Map DOWNLOAD UNDERLYING DATA .XLS Merchant transactions Smart contracts...
07-25-18 | PitchBook | Equity

New Morningstar Analyst Report for Mastercard
... customer data, yet has achieved relatively limited use. Even cutting-edge technologies like Blockchain...
07-25-18 | Jim Sinegal | Equity

Minor Data Center Traction for AMD Is Nice, but Intel and Nvidia Won't Be Easy to Disrupt
... its business, with recent CPU (Ryzen) and GPU (Radeon) products bearing fruit. Meanwhile, blockchain...
07-25-18 | Abhinav Davuluri | Equity

ETF Inflows Trailing at the Half
... seen is a raft of new launches that try to capitalize on all things blockchain-related, including a...
07-03-18 | Ben Johnson |

Do thematic ETFs belong in your portfolio?
... thematic is more of the techno, the artificial intelligence, blockchain. So, basically, this is the theme...
06-14-18 | Christian Charest |

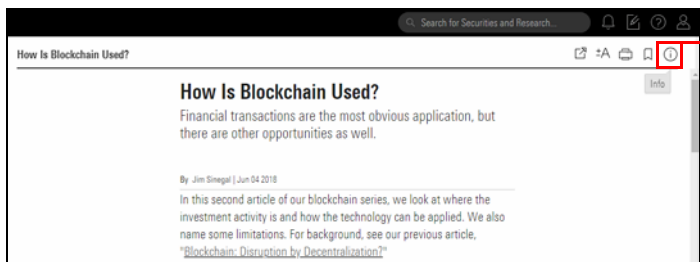
How Blockchain Affects Our Coverage
... seemingly at risk, as blockchain technology can potentially lower transaction costs as well as the costs of...
06-05-18 | Jim Sinegal | Equity

How Is Blockchain Used?
...In this second article of our blockchain series, we look at where the investment activity is and...
06-03-18 | Jim Sinegal | Equity

Canadian Research Highlights--June 2018
05-30-18 | Morningstar | Equity

Click an article.

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.



The screenshot shows the full article page for 'How Is Blockchain Used?'. The article text is visible, and the 'Info' icon in the top right corner is highlighted with a red box. A red arrow points from a text box labeled 'The Info icon opens a side drawer showing a list of securities mentioned in the article.' to this icon.

How Is Blockchain Used?

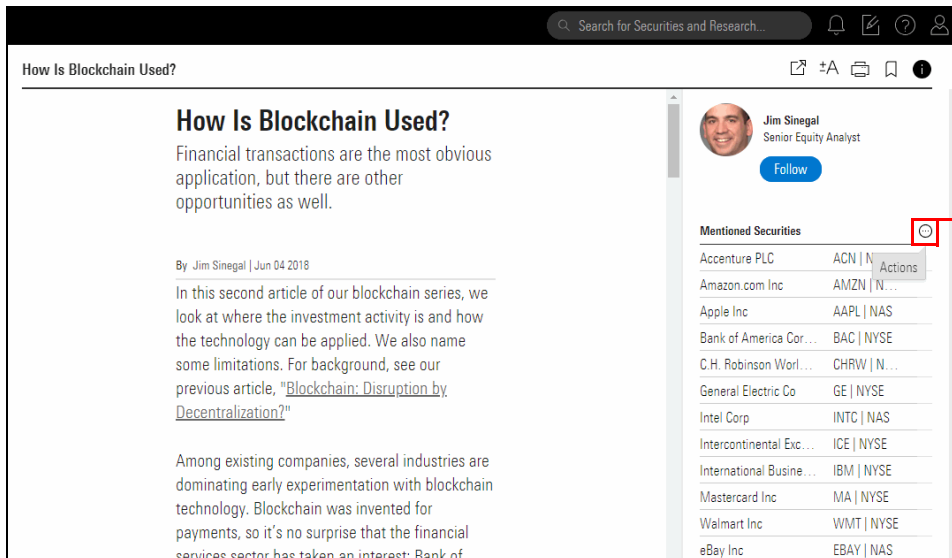
Financial transactions are the most obvious application, but there are other opportunities as well.

By Jim Sinegal | Jun 04 2018

In this second article of our blockchain series, we look at where the investment activity is and how the technology can be applied. We also name some limitations. For background, see our previous article, "Blockchain: Disruption by Decentralization?"

The Info icon opens a side drawer showing a list of securities mentioned in the article.

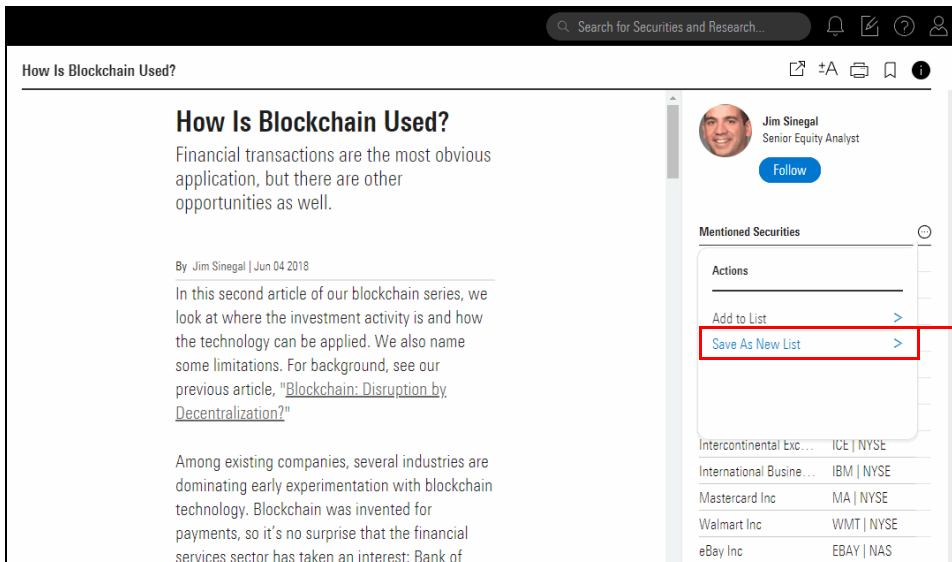
5. In the Mentioned Securities drawer, click the **Actions** icon. The Actions menu opens.



The screenshot shows the Morningstar Research page titled "How Is Blockchain Used?". The article text is visible on the left. On the right, the "Mentioned Securities" drawer is open, displaying a list of companies including Accenture PLC, Amazon.com Inc, Apple Inc, Bank of America Cor..., C.H. Robinson Wor..., General Electric Co, Intel Corp, Intercontinental Exc..., International Busine..., Mastercard Inc, Walmart Inc, and eBay Inc. The "Actions" icon (a circle with a plus sign) is highlighted with a red box. A red arrow points from a text box to this icon.

Use this icon to open the Actions menu.

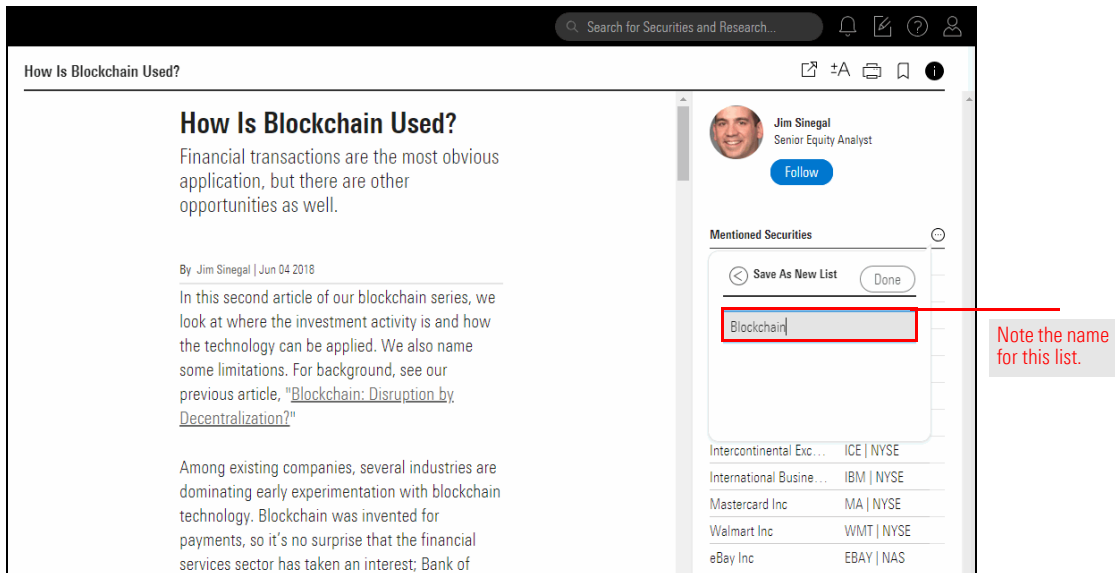
6. Click **Save As New List**.



The screenshot shows the same Morningstar Research page. The "Mentioned Securities" drawer is open, and the "Actions" menu is displayed. The "Save As New List" option is highlighted with a red box. A red arrow points from a text box to this option.

Click this option to save all of the mentioned securities to a list.

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.



How Is Blockchain Used?

Financial transactions are the most obvious application, but there are other opportunities as well.

By Jim Sinegal | Jun 04 2018

In this second article of our blockchain series, we look at where the investment activity is and how the technology can be applied. We also name some limitations. For background, see our previous article, "[Blockchain: Disruption by Decentralization?](#)"

Among existing companies, several industries are dominating early experimentation with blockchain technology. Blockchain was invented for payments, so it's no surprise that the financial services sector has taken an interest; Bank of

Jim Sinegal
Senior Equity Analyst
Follow

Mentioned Securities

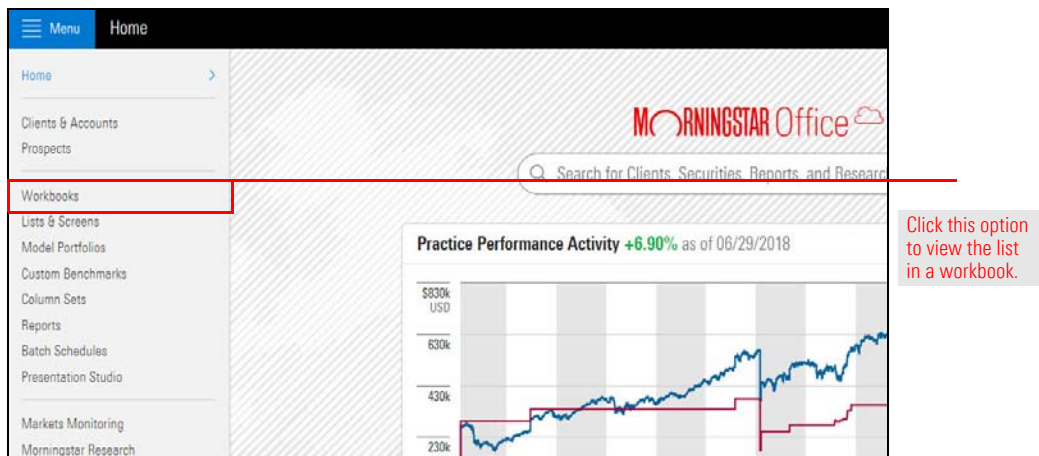
Save As New List Done

Blockchain

Intercontinental Exc... ICE | NYSE
International Busine... IBM | NYSE
Mastercard Inc MA | NYSE
Walmart Inc WMT | NYSE
eBay Inc EBAY | NAS

Note the name for this list.

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.



Menu Home

Home

Clients & Accounts
Prospects

Workbooks

Lists & Screens
Model Portfolios
Custom Benchmarks
Column Sets
Reports
Batch Schedules
Presentation Studio

Markets Monitoring
Morningstar Research

MORNINGSTAR Office

Search for Clients, Securities, Reports, and Research

Practice Performance Activity +6.90% as of 06/29/2018

\$830k USD
630k
430k
230k

Click this option to view the list in a workbook.

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

Select a previously created Workbook from the below table. To delete a Workbook, use the control above.

	Name	Type	Owner	Last Modified Date	Created Date
<input type="checkbox"/>	1 Custom Benchmarks <small>Read Only</small>	Portfolios	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	2 Equity Fund <small>Read Only</small>	Investments	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	3 Fixed Income Fund <small>Read Only</small>	Investments	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	4 Grid View <small>Read Only</small>	Portfolios	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	5 Grid View <small>Read Only</small>	Investments	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	6 Markets - Equity Research <small>Read Only</small>	Investments	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	7 Markets - Overview <small>Read Only</small>	Investments	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	8 Model Portfolios <small>Read Only</small>	Portfolios	Morningstar	01/27/2017	01/26/2017
<input type="checkbox"/>	9 Multi-Asset Fund <small>Read Only</small>	Investments	Morningstar	01/27/2017	01/26/2017

Open the list in this workbook.

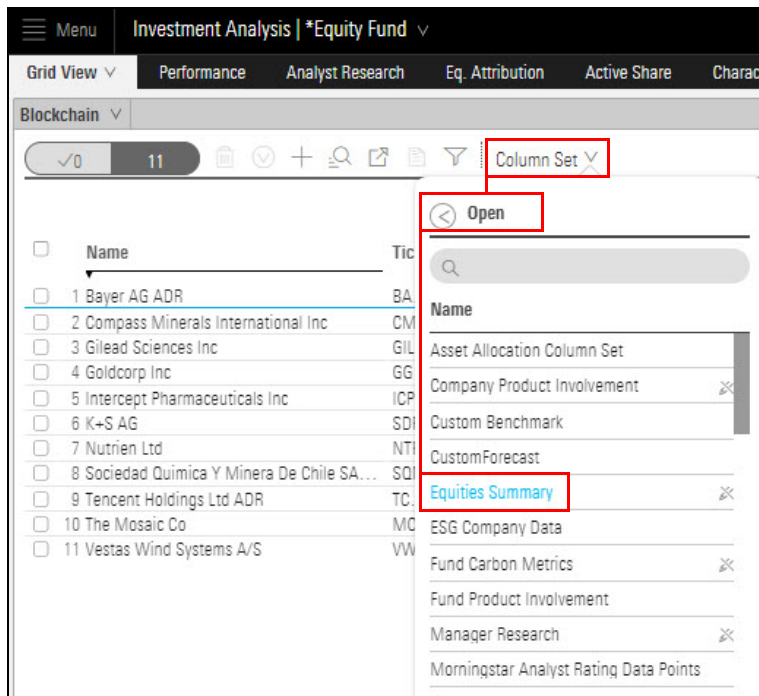
10. Click the **Blockchain** list you just saved. The workbook opens in the Grid View worksheet.

Select a list or screen to view in this workbook

Morningstar 4U1(K) <small>Read Only</small>	List	Desktop Version	02/24/2017	02/10/2017
Preferred Investment	List	Direct Cloud	06/11/2018	02/08/2018
PreferredInvestmentsJCQ <small>Read Only</small>	List	Desktop Version	11/02/2017	11/02/2017
Quantitative rating	List	Direct Cloud	06/28/2018	06/28/2018
Single Investment List <small>Read Only</small>	List	Desktop Version	06/22/2017	06/22/2017
Small Value	List	Direct Cloud	11/02/2017	11/02/2017
The Cohen Prospect List <small>Read Only</small>	List	Desktop Version	09/23/2015	09/23/2015
UK Watch List <small>Read Only</small>	List	Desktop Version	06/28/2016	06/27/2016
US Small Value 5 Stars Funds <small>Read Only</small>	List	Desktop Version	06/26/2017	06/26/2017
Blockchain	List	Direct Cloud	07/10/2018	07/10/2018

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.

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.

Using the Latest Page

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.

Overview

The screenshot shows the 'Latest' page in the Morningstar Research interface. The 'Thematic' button is selected in the toggle at the top of the article list. The 'Filter' drawer is open on the right side, showing options for 'Securities' and 'Focus'. The 'Focus' section has checkboxes for 'Equity', 'Credit', 'Manager', and 'Macro'. The 'Filter' drawer is open by default on the Latest page.

The column reflects the focus of each article.

The Filter drawer is open by default on the Latest page.

Title	Author	Focus	Date
Some Bonds Are Better Diversifiers Than Others	Ben Joh...	Manager	13 hours ago
Lithium Is Crown Jewel for SQM	Seth Gol...	Equity	13 hours ago
China Steel Industry: Are Overcapacity Issues Resolved?	Ken Foon...	Equity	15 hours ago
Moat Framework Series: Media & Telecom	Julie Bh...	Equity	Yesterday
PitchBook Private Market Benchmarks - Data Through 4Q 2017	PitchBook	Equity	Yesterday
Single-Family Rental Research: Performance Summary Covering All Morningstar-Rated Securitizations	Morning...	Credit	Yesterday

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

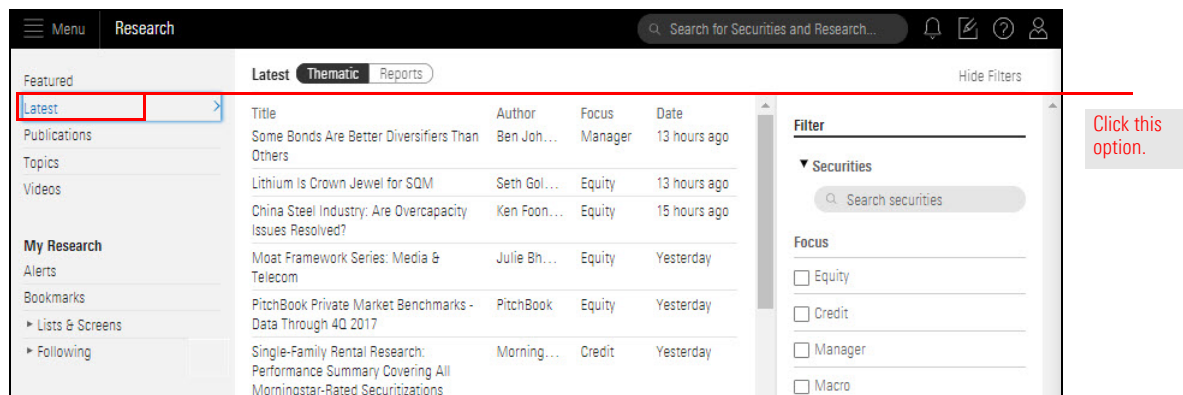
- ▶ filter content on the Latest page ([page 20](#))
- ▶ create a bookmark ([page 21](#))
- ▶ revisit a bookmark ([page 22](#)), and
- ▶ clear a bookmark ([page 23](#)).

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.

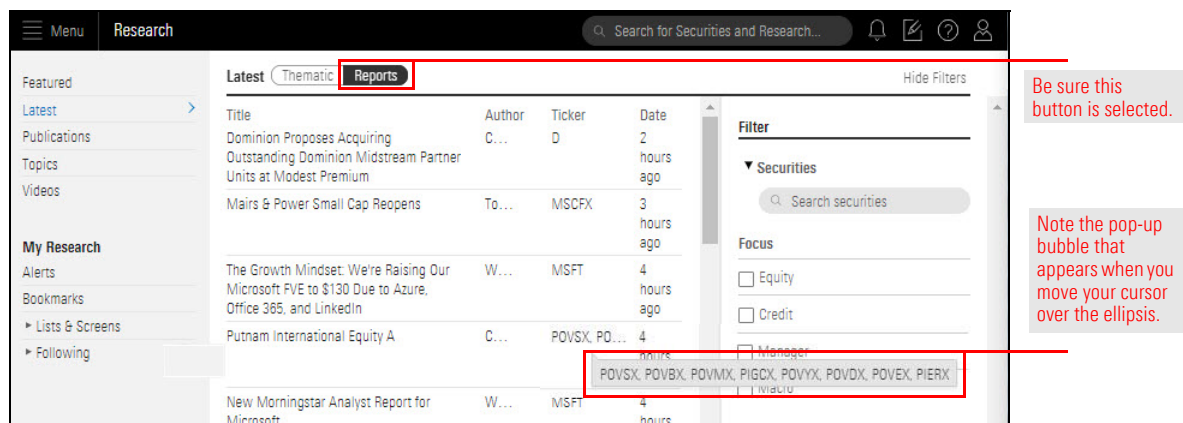
Exercise 6: See which securities are mentioned in an article on the Latest page

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.



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).

Exercise 7: Filter content on the Latest page

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.

The screenshot shows the Morningstar Research interface. The 'Latest' tab is selected, and the 'Reports' toggle is active. A filter drawer is open on the right. Under the 'Focus' section, 'Equity' is selected with a blue checkmark. A red box highlights the 'Equity' label above the table of articles. A red arrow points from the text 'As filters are applied, they appear here.' to the 'Equity' label. Another red arrow points from the text 'Select this option.' to the 'Equity' option in the filter drawer.

Title	Author	Ticker	Date
Martin Marietta Announces Acquisition of Bluegrass Materials but Discloses Few Financial Details	Kristoffer In...	MLM	45 mins ago
Maintaining Seattle Genetics' \$46 FVE in Light of Top-Line ECHELON-1 Results	Kelsey Tsai	SGEN	2 hours ago
Maintaining Our Roche and Chugai FVEs Following Strong Hemophilia Data	Karen Ande...	4519, ROG, ...	3 hours ago
New Morningstar Analyst Report for Power Corporation Of Canada	Brett Horn, ...	POW	3 hours ago
New Morningstar Analyst Report for Walgreens Boots Alliance Inc	Vishnu Lekraj	WBA	4 hours ago

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.

The screenshot shows the Morningstar Research interface. The 'Latest' tab is selected, and the 'Reports' toggle is active. A filter drawer is open on the right. Under the 'Security' section, 'MSFT' is entered in the search field. A dropdown menu is open, showing several options. The first option, 'Microsoft Corp MSFT | NASDAQ', is highlighted with a red box. A red arrow points from the text 'Select this option' to this option. The 'Equity' label is still visible above the table of articles.

Title	Author	Ticker	Date
Martin Marietta Announces Acquisition of Bluegrass Materials but Discloses Few Financial Details	Kristoffer In...	MLM	45 mins ago
Maintaining Seattle Genetics' \$46 FVE in Light of Top-Line ECHELON-1 Results	Kelsey Tsai	SGEN	2 hours ago
Maintaining Our Roche and Chugai FVEs Following Strong Hemophilia Data	Karen Ande...	4519, ROG, ...	3 hours ago
New Morningstar Analyst Report for Power Corporation Of Canada	Brett Horn, ...	POW	3 hours ago
New Morningstar Analyst Report for Walgreens Boots Alliance Inc	Vishnu Lekraj	WBA	4 hours ago

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

The screenshot shows the Morningstar Research interface. At the top, there's a 'Menu' button and a search bar labeled 'Search for Securities and Research...'. Below the menu, there are tabs for 'Latest', 'Thematic', and 'Reports'. A filter drawer is open on the right side, showing 'Equity' and 'Microsoft Corp' as selected filters. A red box highlights the 'Hide Filters' button in the top right corner of the filter drawer. A callout box points to this button with the text: 'Click here to close the Filters drawer.'

Title	Author	Date
Large Cap US Pick List - September 2018	Daniel Rohr, CFA	Sep 07 2018
Large Cap US Pick List - August 2018	Daniel Rohr, CFA	Aug 02 2018
Large Cap Global Core Pick List - August 2018	Daniel Rohr, CFA	Aug 02 2018
Technology Sector Report: Data Security and Privacy Remain on the Forefront	Brian Colello, CPA	Jul 11 2018
Check Out Check Point	William Fitzsimmons	Jul 06 2018
Large Cap Global Core Pick List - July 2018	Daniel Rohr, CFA	Jul 06 2018
Large Cap US Pick List - July 2018	Daniel Rohr, CFA	Jul 06 2018
Technology: Data Security and Privacy Remain on the Forefront	Brian Colello, CPA	Jun 29 2018

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.

Exercise 8: Create a bookmark

To bookmark an article or video, do the following:

- On a Research page, open an article or video by clicking its **name**.
- 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.

The screenshot shows the article page for 'Large Cap U.S. Core Pick List September 2018' by Daniel Rohr, CFA, Regional Director. The article title is highlighted in red. In the upper right corner, there is a toolbar with several icons. A red box highlights the bookmark icon (a square with a circle inside). A callout box points to this icon with the text: 'This is the Bookmark icon'.

Large Cap U.S. Core Pick List September 2018

Sector Valuations
The market appears fairly valued, with the market-capitalization-weighted average, uncertainty-adjusted price/fair value ratio for stocks in the S&P 500 index that are under active Morningstar research coverage at 103% as of Aug. 31, up from last month's ratio of 101%.

The S&P 500 rose 3.03% in August, closing at 2,901.52 at the end of the month. Each of the 11 sectors appears fully valued on an uncertainty-adjusted price/fair value basis. The industrials and healthcare sectors were the most expensive,

Colgate-Palmolive CL (\$72 fair value estimate), **Molson Coors Brewing TAP** (\$80 fair value estimate), and **Coty COTY** (\$14.80 fair value estimate, down from \$16.70 after we lowered our expectations for margin expansion and near term sales growth). We added **JM Smucker SJM** (\$129 fair value estimate), **Campbell Soup CPB** (\$48.50 fair value estimate), and **Dollar Tree DLTR** (\$98 fair value estimate). Analyst Erin Lash explains:

"In our view, Campbell has amassed a wide economic moat, resulting from both intangible assets and a cost

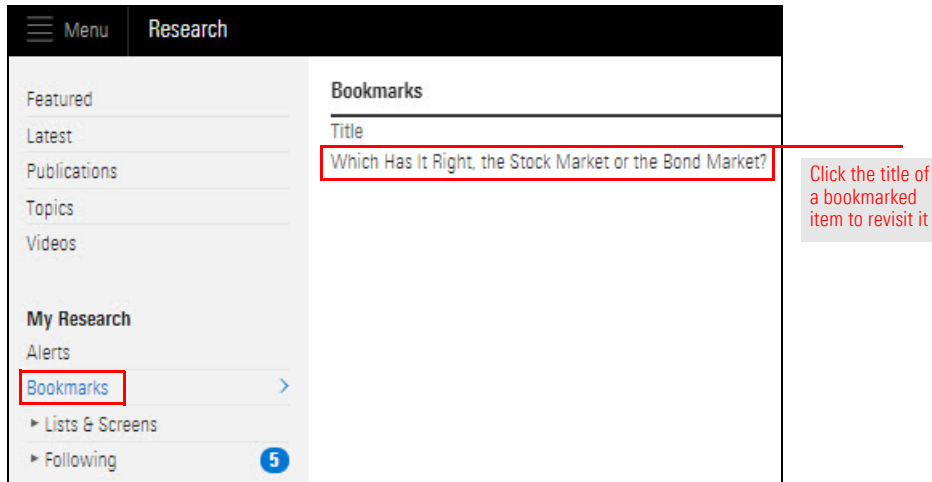
Mentioned Securities

AT&T Inc	T N...
Affiliated Manage...	AMG N...
Alexion Pharmace...	ALXN NAS
Allergan PLC	AGN N...
American Internati...	AIG N...
AmerisourceBerge...	ABC N...
Applied Materials Inc	AMAT N...
Biogen Inc	BIIB NAS
BlackRock Inc	BLK N...
Boston Properties Inc	BXP N...
Broadcom Inc	AVGO N...

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.

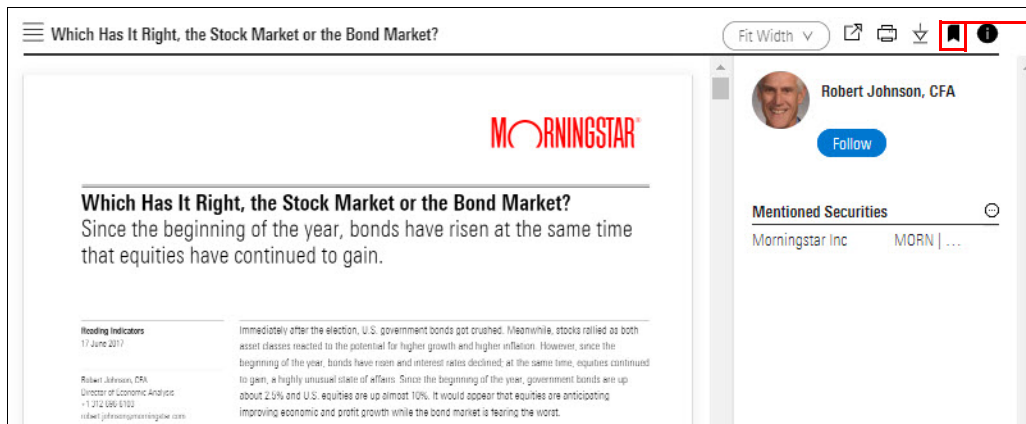
Exercise 9: Revisit a bookmarked item



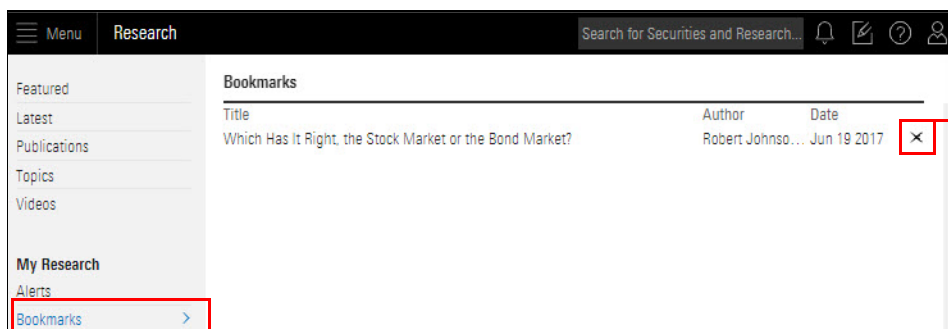
You can clear a bookmark in the following ways:

- ▶ 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.

Exercise 10: Clear a bookmark



Click this icon to clear a bookmark, or...



...click the X here to clear a bookmark.

Using the Publications Page

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](#)).

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.

Overview

Exercise 11: Follow a publication

The screenshot shows the Morningstar Research Publications page. On the left is a navigation pane with options: Featured, Latest, Publications (selected), Topics, Videos, My Research, Alerts, Bookmarks, Lists & Screens, and Following. The main content area is titled 'Publications' and displays a grid of six publication tiles. The tiles are organized by category: MANAGER (Active/Passive Barometer), EQUITY (Canada Equity Pick Lists, EMEA International), and CREDIT (Credit Quarterly Outlook). The 'Canada Equity Pick Lists' tile is highlighted with a red border. A red line points from a text box to the title of this tile, and another red line points from a text box to the timestamp '16 days ago' at the bottom of the tile.

Click the name of the publication to which you'd like to subscribe.

The time stamp or date at the bottom of each tile reflects when the content was last updated.

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.

The screenshot shows the Morningstar Research interface. In the top right corner, a button labeled "Following" is highlighted with a red box. In the left navigation pane, under the "Following" section, the "Active/Passive ..." entry is highlighted with a red box and has a blue circle with the number "5" next to it. To the right of the navigation pane, a table lists related research items.

ALL RELATED RESEARCH

Title	Author	Date
Active vs. Passively Managed Funds: Takeaways from Our Mid-Year Report	Ben Johnso...	Aug 23 2018
Active/Passive Barometer Year-End 2017: Active Managers' Success Rates Spike Higher	Ben Johnso...	Mar 01 2018
Active/Passive Barometer Mid-Year 2017: Active Funds 1-Yr Results Substantially Improve, But Long-Run Results Remain Poor	Ben Johnso...	Aug 22 2017
The Morningstar Active/Passive Barometer - Year-End 2016	Ben Johnso...	Mar 08 2017
Active Passive Barometer: Active Managers Suffer as Market Leadership Shifts from Growth to Value	Ben Johnso...	Aug 18 2016

Note the state of the button after clicking Follow.

When new content is available in a publication, a number appears to the right of its name.

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.

Exercise 12: Unfollow a publication

The screenshot shows the Morningstar Research interface. In the left navigation pane, under the "Following" section, the "Active/Passive ..." entry is highlighted with a red box and has a blue circle with the number "5" next to it. To the right of the navigation pane, a table lists related research items.

ALL RELATED RESEARCH

Title	Author	Date
Active vs. Passively Managed Funds: Takeaways from Our Mid-Year Report	Ben Johnso...	Aug 23 2018
Active/Passive Barometer Year-End 2017: Active Managers' Success Rates Spike Higher	Ben Johnso...	Mar 01 2018
Active/Passive Barometer Mid-Year 2017: Active Funds 1-Yr Results Substantially Improve, But Long-Run Results Remain Poor	Ben Johnso...	Aug 22 2017
The Morningstar Active/Passive Barometer - Year-End 2016	Ben Johnso...	Mar 08 2017
Active Passive Barometer: Active Managers Suffer as Market Leadership Shifts from Growth to Value	Ben Johnso...	Aug 18 2016

Click the X to unfollow.

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

The screenshot shows the Morningstar Research interface. On the left is a navigation menu with options like 'Menu', 'Research', 'Featured', 'Latest', 'Publications', 'Topics', 'Videos', 'My Research', 'Alerts', 'Bookmarks', 'Lists & Screens', and 'Following'. The main content area displays the 'Active/Passive Barometer' with a description and a table of 'ALL RELATED RESEARCH'. A red box highlights the 'Following' button in the top right corner, with a callout box stating 'Click this button to unfollow.'

Title	Author	Date
Active vs. Passively Managed Funds: Takeaways from Our Mid-Year Report	Ben Johnso...	Aug 23 2018
Active/Passive Barometer Year-End 2017: Active Managers' Success Rates Spike Higher	Ben Johnso...	Mar 01 2018
Active/Passive Barometer Mid-Year 2017: Active Funds 1-Yr Results Substantially Improve, But Long-Run Results Remain Poor	Ben Johnso...	Aug 22 2017
The Morningstar Active/Passive Barometer - Year-End 2016	Ben Johnso...	Mar 08 2017
Active Passive Barometer: Active Managers Suffer as Market Leadership Shifts from Growth to Value	Ben Johnso...	Aug 18 2016

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:

Exercise 13: See the most recently updated content first

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.

The screenshot shows the Morningstar Research 'Publications' page. A 'Sort By' dropdown menu is open, showing options: 'A to Z', 'Recently Updated' (which has a checkmark), and 'Date Added'. A red box highlights the 'Sort By' icon in the top right corner, with a callout box stating 'Use this icon to sort the publications.' Another red box highlights the 'Recently Updated' option in the dropdown menu, with a callout box stating 'The checkmark to the right of an option here indicates the current sort order.'

The publications are displayed as tiles with category labels and timestamps:

- MULTI-FOCUS**: Morningstar Cloud Articles (2 hours ago)
- EQUITY**: Stock Strategist (Yesterday)
- MANAGEMENT**: ETF Specialist (Yesterday)
- ANALYSIS**: Market Outlook (Yesterday)

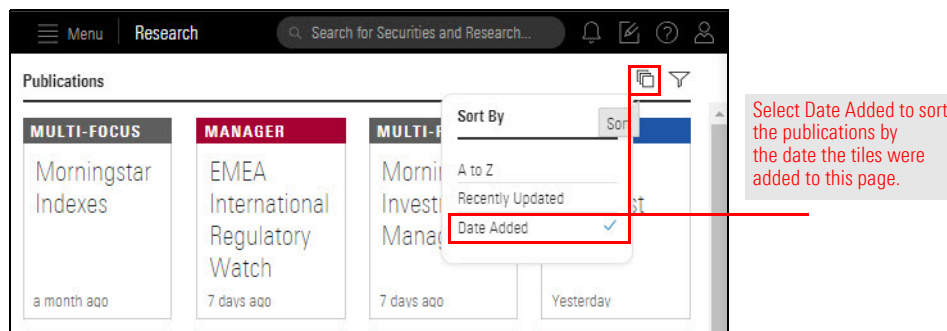
In addition to being able to show publications with the newest content, you can also show the newest Publication tiles at the top of the page. Sorting in this way allows you to note what new subjects have been added to this page.

Exercise 14: Find the publications added most recently

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.



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.

Exercise 15: Follow everything a certain author writes

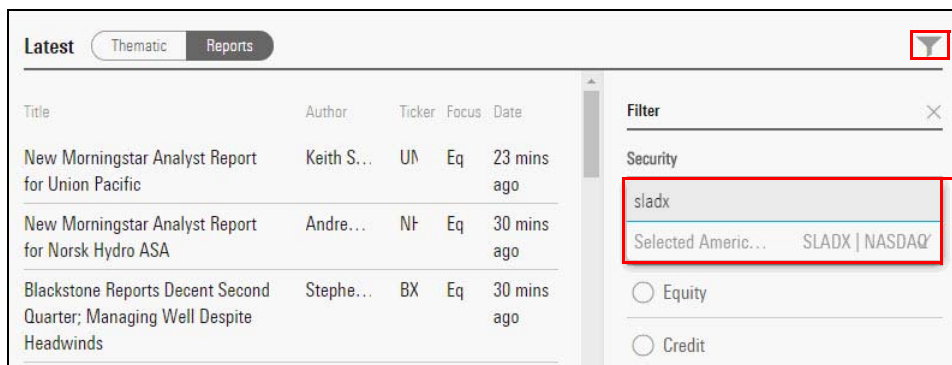
To follow an author, do the following:

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



Be sure Reports is selected on the Latest page.

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.



Click the name of the fund for which you searched.

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.

The screenshot shows the Morningstar Research interface. At the top, there's a search bar and navigation tabs for 'Latest', 'Thematic', and 'Reports'. Below the tabs, there's a filter section with 'Security' and 'Focus' options. The main table lists reports with columns for Title, Author, Ticker, and Date. The first row shows 'Selected American Shares D' by 'Dan Culloton' with ticker 'SLASK, SLADX' and date 'Feb 03 2017'. The second row shows 'Davis Funds to Launch Active ETFs' by 'Dan Culloton' with ticker 'CFIMX, NY...' and date 'Aug 11 2016'. A red box highlights the author's name 'Dan Culloton' in the first row, and a red arrow points to it with the text 'Click the author's name.'

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.

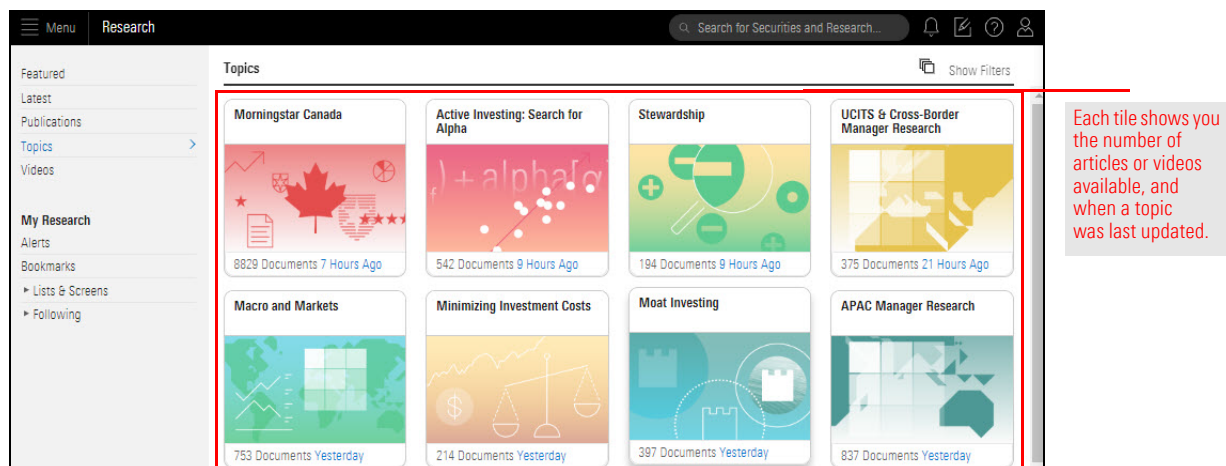
The screenshot shows the author profile page for Dan Culloton. At the top, there's a header with the author's name 'Dan Culloton' and a 'Follow' button. Below the header, there's a profile picture and a bio. The bio states: 'Dan Culloton is an associate director covering equity strategies on Morningstar's manager research team. He is a member of Morningstar's Analyst Ratings Committee for domestic-equity funds and alternative strategies. Culloton is the lead analyst on a number of asset managers including BlackRock and Davis Selected Advisors, and he previously served as lead analyst on multiple top-25 firms including Vanguard and Dodge & Cox. He edited the first Morningstar ETFs 150 reference guide and served as editor of the Vanguard Fund Family Report for six years. Before joining the company in 1999, he was a business writer for The Daily Herald and was a recipient of the Chicago Headline Club's Peter Lisagor Award in 1998. Culloton holds a bachelor's degree in English and journalism from Marquette University and a master's degree in public affairs reporting from the University of Illinois at Springfield.' A red box highlights the 'Follow' button, and a red arrow points to it with the text 'Click this button to follow this author.'

Using the Topics Page

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.

Overview

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



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

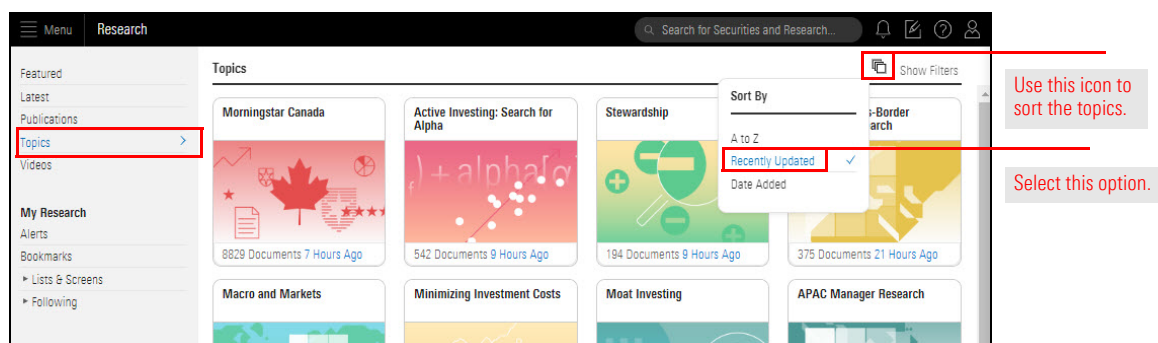
- ▶ view the most recently updated topics ([page 30](#)), and
- ▶ display the newest topics at the top of the Topics page ([page 31](#)).

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

Exercise 16: See which topics were updated most recently

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.



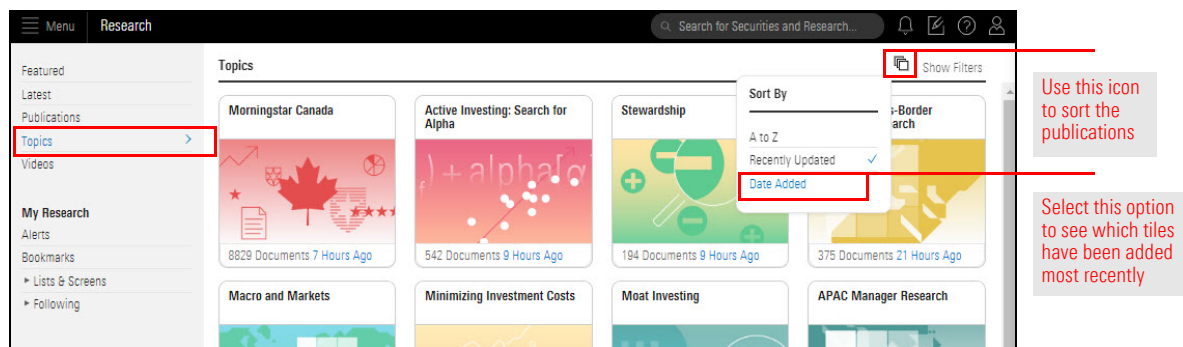
In addition to seeing which topic has the newest content, you can also see which Topic tiles have been added most recently. Sorting in this way allows you to note new areas of interest added to this page.

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



Using My Research

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:

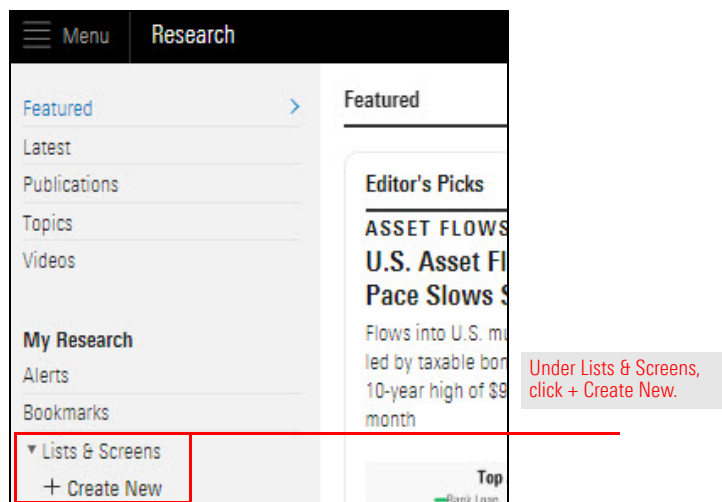
- ▶ create a list and see related Morningstar Research ([page 32](#))
- ▶ use the Research area to create and manage Morningstar Manager Research alerts ([page 34](#))
- ▶ the notification options in a Morningstar Manager Research alert ([page 34](#))
- ▶ create a Morningstar Manager Research alert ([page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

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.



Overview

Exercise 18: Create a list and see related Morningstar Research

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.

Create New List

Stocks to Watch

Cancel Save

Enter the name for the list here.

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.

Research Search for Reports and Research

Stocks to Watch Thematic Reports Edit List

Title	Author	Ticker	Date
A Weekly Summary of Our Best Ideas and Developments in the Companies We Cover	Morningstar	CVE	2 days ago
The First 100 Days: Does the Likelihood and Nature of Trump's Tax and Trade Proposals Warrant Investors Shopping the Consumer Discretionary Space?	Bridget Wei...	BBBY, TSCO	6 days ago
Top 10 Holdings of Our Ultimate Stock-Pickers' Index	Joshua Agu...	V	6 days ago
This Old Housing Recovery	Morningstar	BBBY	Jun 16 2017
Morningstar StockInvestor - June 2017	David Harrell	V	Jun 08 2017
Morningstar StockInvestor - May 2017	David Harrell	V	Jun 08 2017
Large Cap Global Core Pick List - June 2017	Elizabeth C...	BBBY, TSCO, V	Jun 06 2017
Large Cap US Pick List - June 2017	Elizabeth C...	BBBY, TSCO	Jun 06 2017
Global Equity Best Ideas for June 2017	Morningstar	BBBY, CVE	Jun 01 2017
Rising Rates Pose Low Near-Term Risk to Home Retailers	Jaime M. K...	BBBY	May 19 2017
The Market Is Missing Cenovus' Potential	Joe Gemini...	CVE	May 03 2017
Large Cap US Pick List - May 2017	Elizabeth C...	BBBY, TSCO, V	May 03 2017
Large Cap Global Core Pick List - May 2017	Elizabeth C...	BBBY, TSCO, V	May 03 2017
Global Equity Best Ideas for May 2017	Morningstar	BBBY, CVE	May 01 2017

Edit List

Add Security

Search by Security

Name	Identifier
Cenovus Energy Inc	CVE NEW YORK...
Bed Bath & Beyo...	BBBY NASDAQ
Tractor Supply Co	TSCO NASDAQ
Visa Inc Class A	V NEW YORK S...

Be sure these stocks appear here.

Click this button once all securities are found.

Save

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.

How can I use the Research area to create 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:

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

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 .	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.

☞ Note: The email comes from MorningstarOfficeNotifications.

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

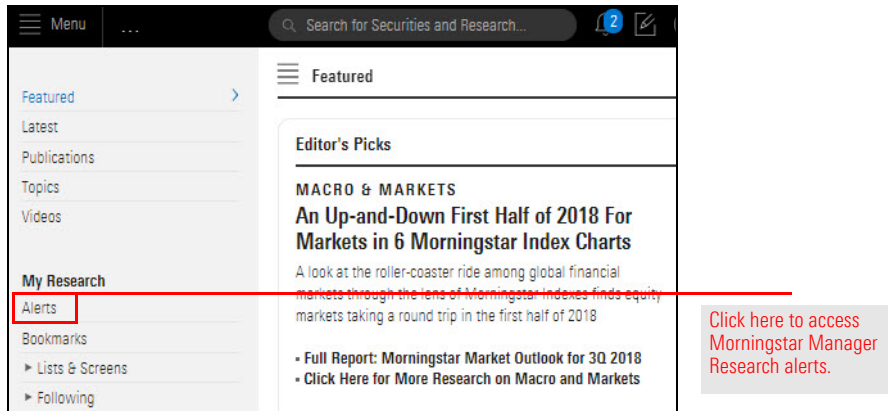
- ▶ Daily notifications are sent at 6 a.m. (Chicago time) and only when one or more alerts have been triggered in the previous 24 hours.
- ▶ Weekly notifications are sent on Thursdays at 10 a.m. (Chicago time) and only when one or more alerts have been triggered in the previous seven days, and
- ▶ If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

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.

Exercise 19: Create a Morningstar Manager Research alert

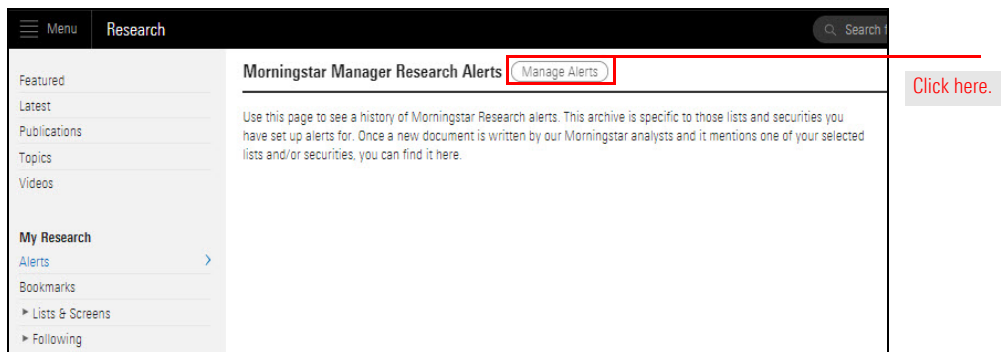
To create a Morningstar Manager Research alert in the Research area, do the following:

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.



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.

Edit Alerts: Morningstar Manager Research [Cancel] [Save]

Search for lists and securities: ETFs

Lists

Name	Last Modified Date
Income ETFs	9/7/2018
US ETFs - quant ratings	6/23/2017
US ETFs Large Mid Small	7/16/2018

Securities

Name	Identifier	Type
ETFS Physical Swiss Gold	SGOL NYSE ARCA	Exchange-Traded Fund
ETFS Physical Platinum	PPLT NYSE ARCA	Exchange-Traded Fund
ETFS Physical PM Basket	GLTR NYSE ARCA	Exchange-Traded Fund
ETFS Physical Silver	SIVR NYSE ARCA	Exchange-Traded Fund
ETFS Bloomberg All Commodity Strt K-1 Fr	BCI NYSE ARCA	Exchange-Traded Fund

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](#).

Edit Alerts: Morningstar Manager Research [Cancel] [Save]

Search for lists and securities: Income ETFs

Income ETFs LIST

☒ Office Cloud ☐ Email

☒ Immediately ☐ Daily

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

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](#).

Add Alerts: ETFs

☒ Morningstar Manager Research
You will be notified when Morningstar's analysts release new research that mentions your securities. This includes Global Fund Reports, Analyst Notes, sustainable investing pieces, and white papers and commentaries.

ETF LIST MANAGED PRODUCT/FUND

☒ Direct Cloud ☒ Email

☒ Immediately ☐ Immediately

☐ Daily ☐ Daily

☒ Weekly ☐ Weekly

Cancel Save

Weekly delivery is available only when you select Email.

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

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.

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

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.

Morningstar Manager Research Alerts

Use this page to see a history of your Morningstar Research alerts based on your selected lists and individual securities. Once a new piece of research or commentary is published that mentions on your selected securities, you can find it here.

11/01/2018 - 11/08/2018 X Clear Filters

Janus Henderson US Managed Volatility I JRSIX
Janus Henderson's Move to a Single CEO Doesn't Alter Its Parent Rating
Yesterday

Janus Henderson Growth And Income D JNGIX
Janus Henderson's Move to a Single CEO Doesn't Alter Its Parent Rating
Yesterday

T. Rowe Price Blue Chip Growth TRBCX
A Big Year for Upgrades of T. Rowe Price Funds
Yesterday

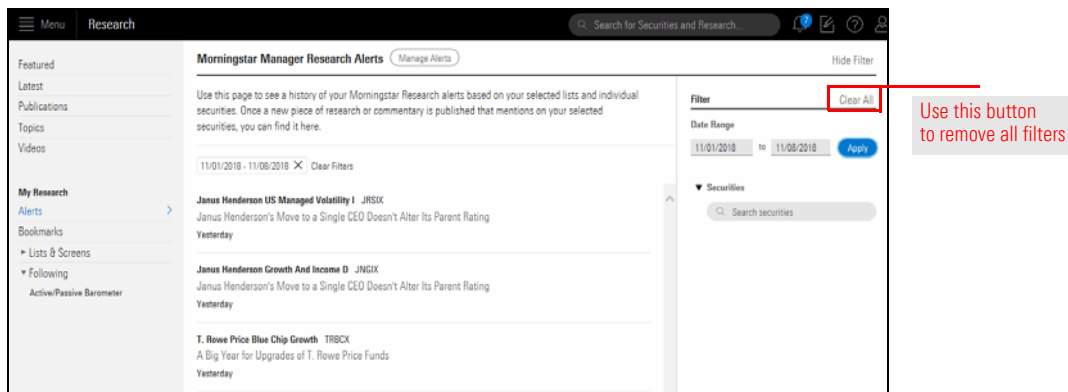
Filter Clear All

Date Range
11/01/2018 to 11/08/2018 Apply

Securities
Search securities

Enter a date range for which you want to see triggered alerts, then click Apply.

- 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.
- To return to seeing all alerts, click **Clear All**.

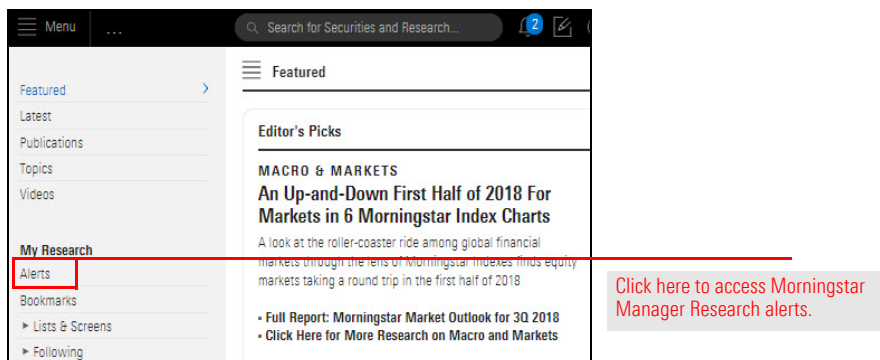


Modifying a Morningstar Manager Research alert in the Research area is very similar to modifying an alert on the main Alerts page (accessible from the Menu).

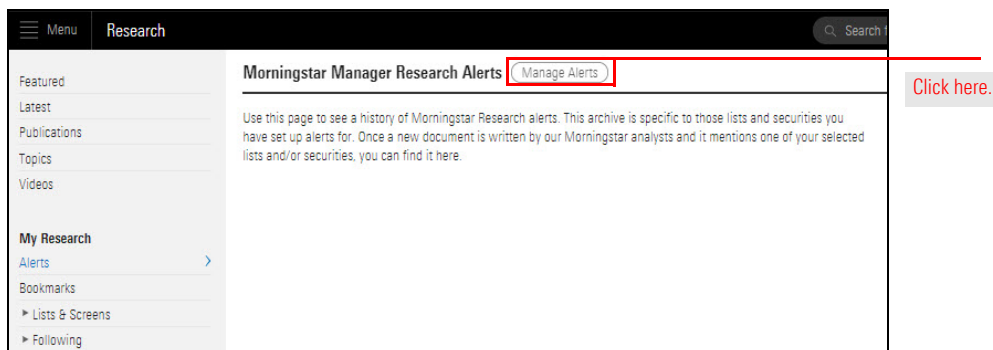
Exercise 21: Modify a Morningstar Manager Research alert

Do the following:

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



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



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**. A 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.

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.

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

Accessing Morningstar Research from an Investment Workbook

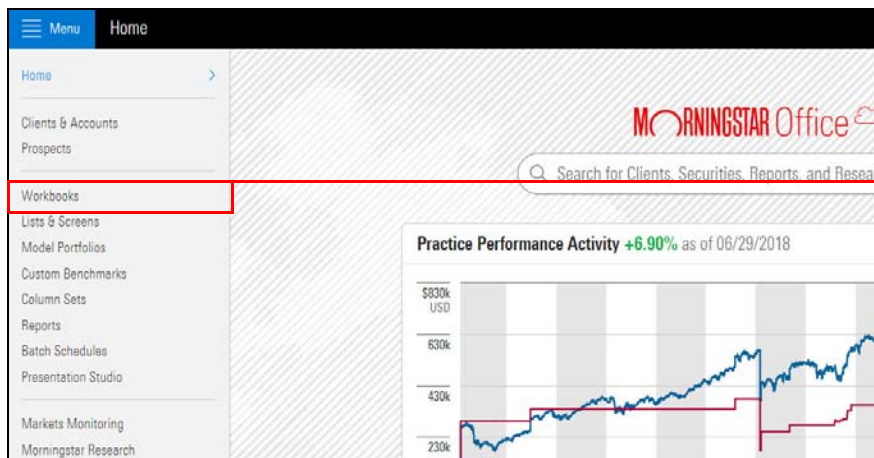
Morningstar Research can be accessed outside of the Research area. In this section, you will learn how to access Morningstar Research from an investment workbook.

Overview

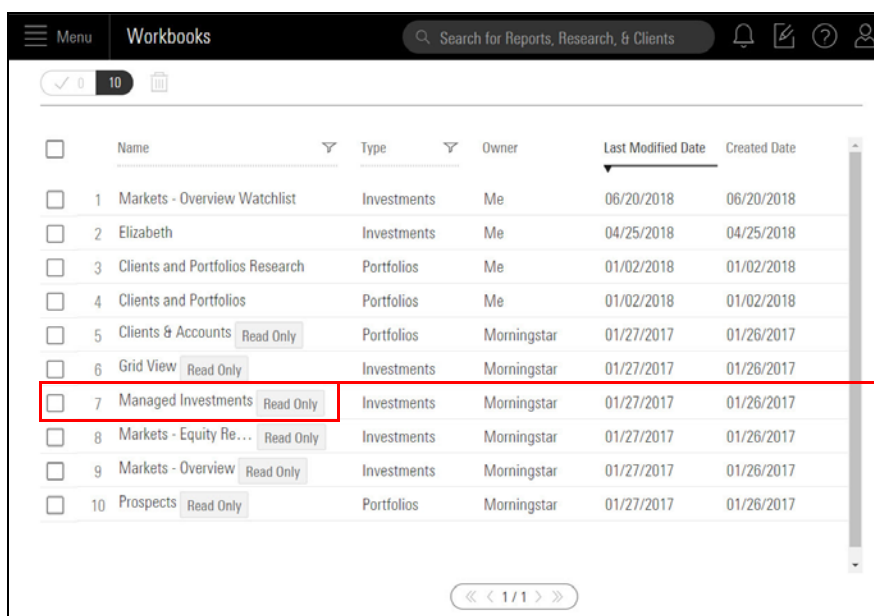
By using the Analyst Research component in an investment workbook, you can quickly view the current articles about a specific investment or list. To access Morningstar Research from an investment workbook, do the following:

Exercise 22: View Morningstar Research in an investment workbook

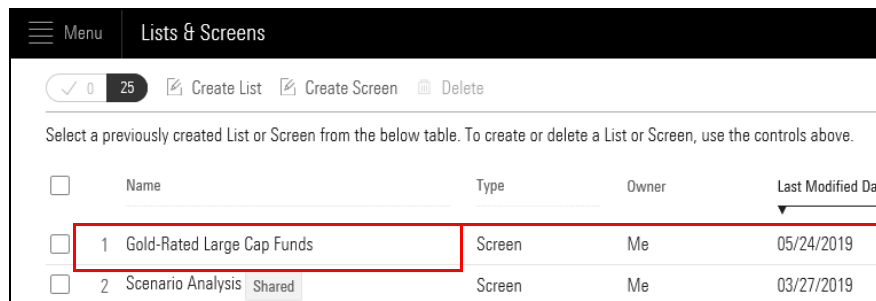
1. From the **Menu**, select **Workbooks**. A dialog box opens.



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



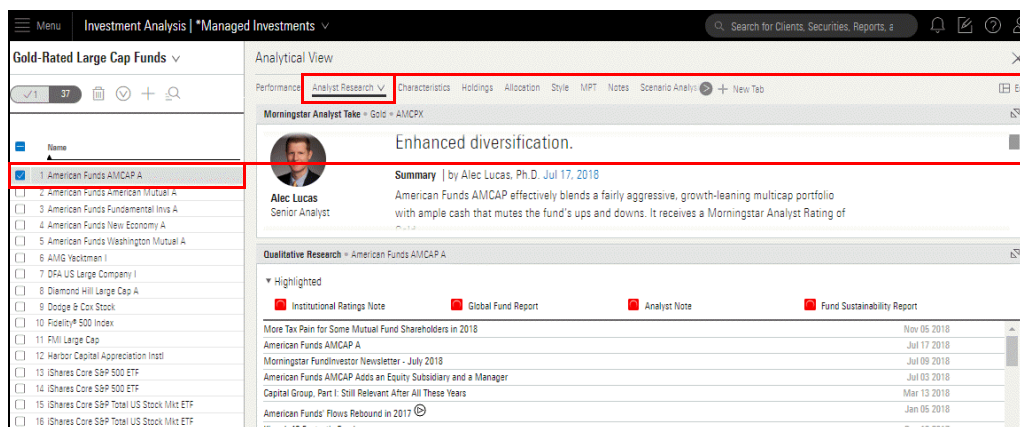
2. Select a **List** or **Screen**.



<input type="checkbox"/>	Name	Type	Owner	Last Modified Date
<input type="checkbox"/>	1 Gold-Rated Large Cap Funds	Screen	Me	05/24/2019
<input type="checkbox"/>	2 Scenario Analysis Shared	Screen	Me	03/27/2019

Open this Screen.

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



Investment Analysis | *Managed Investments

Gold-Rated Large Cap Funds

Analyst Research

Enhanced diversification.

Summary | by Alec Lucas, Ph.D. Jul 17, 2018

American Funds AMCAP effectively blends a fairly aggressive, growth-leaning multicap portfolio with ample cash that mutes the fund's ups and downs. It receives a Morningstar Analyst Rating of Gold.

Qualitative Research - American Funds AMCAP A

Highlighted

Institutional Ratings Note

Global Fund Report

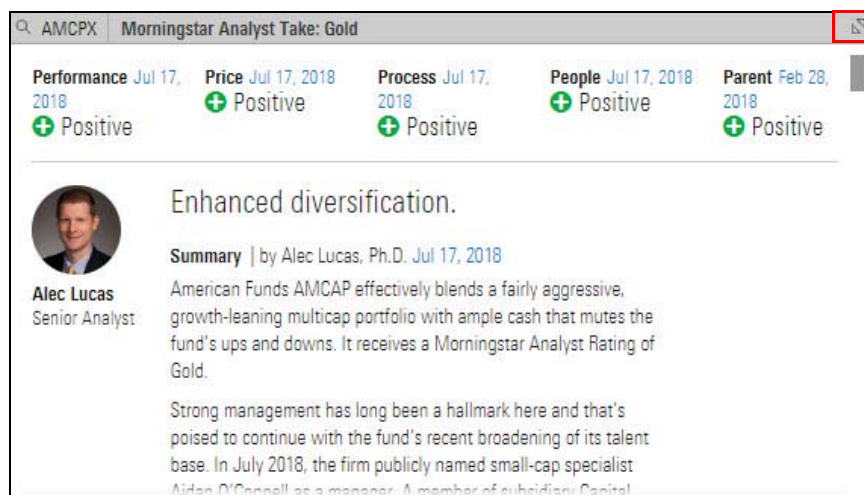
Analyst Note

Fund Sustainability Report

Select this tab.

Research for only one security at a time is displayed.

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



AMCPX Morningstar Analyst Take: Gold

Performance Jul 17, 2018 + Positive

Price Jul 17, 2018 + Positive

Process Jul 17, 2018 + Positive

People Jul 17, 2018 + Positive

Parent Feb 28, 2018 + Positive

Enhanced diversification.

Summary | by Alec Lucas, Ph.D. Jul 17, 2018




American Funds AMCAP effectively blends a fairly aggressive, growth-leaning multicap portfolio with ample cash that mutes the fund's ups and downs. It receives a Morningstar Analyst Rating of Gold.

Strong management has long been a hallmark here and that's poised to continue with the fund's recent broadening of its talent base. In July 2018, the firm publicly named small-cap specialist Aidan O'Connell as a manager. A member of subsidiary Capital

Click here to expand the component.

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

- | Morningstar Research: American Funds AMCAP A | |
|--|-------------|
| <div> <div> <div>▼ Highlighted</div> <div> <div>  Global Fund Report </div> <div>  Fund Sustainability Report </div> </div> <div> <div>  Analyst Note </div> </div> </div> </div> | |
| American Funds AMCAP A | Jul 17 2018 |
| Morningstar FundInvestor Newsletter - July 2018 | Jul 09 2018 |
| American Funds AMCAP Adds an Equity Subsidiary and a Manager | Jul 03 2018 |
| Capital Group, Part I: Still Relevant After All These Years | Mar 13 2018 |
| American Funds' Flows Rebound in 2017 ☺ | Jan 05 2018 |
| Kinzel: 43 Fantastic Funds | Sep 18 2017 |
| Morningstar Analyst Ratings: U.S. Fund Ratings Activity July 24-30, 2017 | Jul 31 2017 |
| The Story of Two Bears and Two Bulls | Jan 31 2017 |

Click the name of an article of video to view it.