Working with Custom data sets

Morningstar OfficeSM Cloud



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Working with Custom Data Sets in Morningstar OfficeSM Cloud

By now, you should have completed the Creating Lists and Workbooks and Creating Screens manuals. The products of the exercises you completed are referenced in this manual.

The Grid in Morningstar OfficeSM Cloud offers several prebuilt data sets with data points grouped logically together. For example, you can find a data set for Performance & Risk, Equity holdings, Fixed Income holdings, Returns, Sustainability, and more. These data sets are read-only, and cannot be changed.

Name	Ticker	Secid	All Data Sets	Morni Sustai (mo-e
 American Funds Washington Mutual A 	AWSHX	FOUSA	Q. Search for a data set	00
2 Bishop Street High Grade Inc Instl	BSHGX	FOUSA		-
3 Fidelity® Contrafund®	FCNTX	FOUSA	011ColSet ^	00
4 Hartford Equity Income A	HQIAX	FOUSA	Company Product Involvement	00
5 Pioneer Equity Income A	PEQIX	FOUSA	Equities Summary	00
6 PRIMECAP Odyssey Growth	POGRX	FOUSA	ESC Company Data	۲
7 Selected American Shares D	SLADX	FOUSA		00
8 Vanguard S&P 500 ETF	V00	F00000	Fl analysis-DataSet	00
			Fund Carbon Metrics	
			Manager Research	
			Manager Research2017-01-24	
			MPT Statistics (Month-End)	

More than a dozen prebuilt data sets are available by default

Overview

Not all data points are available via these pre-built data sets, and you might prefer to build your own data set, containing data point(s) you want to display. This manual helps you do the following:

- ► Create, save, and share a custom data set
- ► Find and customize data points when building a custom data set, and
- Nest data points together by date or data point type.

Create and Save a Custom Data Set

When you create a custom data set, you have two options:

- ► Start from scratch and add columns one at a time in exactly the order you want, or
- Open an existing data set and just add or remove the columns as needed.

This section contains exercises covering both approaches.

When you created your first screen (for 5-star stocks), you changed the default Summary data set in the Grid View to the Equities Summary data set. The Equities Summary data set contains the Morningstar Rating column, but none of the other Morningstar proprietary data points for equities are included. This exercise teaches you how to remove the columns you do not want to see in a data set, find a data point you want to add to a data set, and rearrange the data points in a data set. Do the following: Overview

Exercise 1: Create a custom data set for stocks

1. From the **Home** page, in the **Lists & Screens** area, select **5-star stocks**. The 5-star stocks screen opens in a grid.

Q Searc	M RNINGSTA	R Office			
CA Bear		eports, and nesearch			
Practice Management Repor	ts				
Gain insights into your practice by sta	rting a spreadsheet report on:				
Your assets under management	(O) Your p perform	mance	Unrealize for all you	d gains & losses ır clients	
Clients	🖉 Create	Lists & Screens		🖄 Create 🗸	
Clients Name	☑ Create Market Value	Lists & Screens	Туре	🖄 Create 🗸	
Clients Name AVIE HERRINGE	Create Market Value \$39,802,238.80	Lists & Screens Name Funds and ETFs	Type List	Create V Last Modified	
Clients Name AVIE HERRINGE COSTAL KASSNER	Create Market Value \$39,802,238.80 \$39,802,238.80	Lists & Screens Name Funds and ETFs Mixed Investments	Type List List	Create V Last Modified 02/12/2020 02/11/2020	
Clients Name AVIE HERRINGE COSTAL KASSNER Brian Lav	Create Market Value \$39,802,238.80 \$39,802,238.80 \$39,802,238.80 \$20,436.77	Lists & Screens Name Funds and ETFs Mixed Investments Large Cap Funds	Type List List List	☑ Create ✓ Last Modified ▲ 02/12/2020 ▲ 02/11/2020 ↓ 02/11/2020 ↓	
Clients Name AVIE HERRINGE COSTAL KASSNER Brian Lav Lola Bunny	Create Market Value \$39,802,238.80 \$39,802,238.80 \$20,436.77 \$10,125.27	Lists & Screens Name Funds and ETFs Mixed Investments Large Cap Funds Analyst Rated Funds	Type List List List Screen	☑ Create ✓ Last Modified ▲ 02/12/2020 △ 02/11/2020 △ 02/11/2020 ○ 02/11/2020 ○	Click here to sta

2. Click the Data Set menu, then select All Data Sets.

	5-Star Stock $ \lor $				Q 56	earch for Clier	nts, S	
	10 59		Data	Set: Equities Summa	ry Read Only	\sim		
_				Open Recently Viewed ⑦		y-	Bas	
	Name	Ticker	Exchange	Equities Summary		d)	Cur	
	1 Abercrombie & Fitch Co Class A	ANF	NEW YOF	All Data Sets		> 95	US	
	2 Adient PLC	ADNT	NEW YOF			55	US	Use this option
	3 Aegon NV ADR	AEG	NEW YOF	Data Set Actions		79	US	ovisting data set
	4 AMC Networks Inc A	AMCX	NASDAQ	Data Set Actions		96	US	Chisting data set
	5 American International Group Inc	AIG	NEW YOF	🖉 Edit		73	US	
	6 Anheuser-Busch InBev SA/NV ADR	BUD	NEW YOF			54	US	
	7 Athene Holding Ltd Class A	ATH	NEW YOF	B OBVEAS		71	US	
	8 Aurora Cannabis Inc	ACB	NEW YOF	+ Create New Data Se	et	14	US	
	9 Berry Global Group Inc	BERY	NEW YOF			00	US	
	10 Big Lots Inc	BIG	NEW YOR	STOCK EXCHANGE, INC.	USA	1,049,860,004	US	
	11 British American Tobacco PLC ADR	BTI	NEW YOR	STOCK EXCHANGE, INC.	GBR 1	01,219,557,641	US	
	12 Brookfield Property Partners LP	BPY	NASDAQ		USA	17,290,826,616	US	
	13 Cameco Corp	CCJ	NEW YOR	STOCK EXCHANGE, INC.	CAN	3,749,029,248	US	
	14 China Unicom (Hong Kong) Ltd ADR	CHU	NEW YOR	STOCK EXCHANGE, INC.	CHN	26,595,992,634	US	

- 3. Select the Equities Summary data set. (If it is not selected by default).
- 4. Click the **Data Set** menu again, then select **Edit**. The Data Set Management window opens.

5-Star Stock ∨		7 Data	a Set:	Equities Summa	ry Rea	Q Search for Cliverand Only ∨	ents	s, S	
 Name	Tisker	Evaluation	Оре	en Recently Viewed ⑦		1	/- E	Bas	
Name	TICKET	Excitatige	Equ	uities Summary		~	., i	Jun	
1 Abercrombie & Fitch Co Class A	ANF	NEW YOF	ΔII	Data Sets		> 1	5 l	JS	Lieo this option
2 Adient PLC	ADNT	NEW YOF				3	5 l	JS	to modify the
3 Aegon NV ADR	AEG	NEW YOF	Dat	ta Set Actions		7	9 l	JS	columns being shown
4 AMC Networks Inc A	AMCX	NASDAQ	Dat	a set Actions)	6 l	JS	
5 American International Group Inc	AIG	NEW YO	Ø	Edit			3 ι	JS	
6 Anheuser-Busch InBev SA/NV ADR	BUD	NEW YOF	П	Save As		0	4 l	JS	
7 Athene Holding Ltd Class A	ATH	NEW YOF		Save As		1	1 (JS	
8 Aurora Cannabis Inc	ACB	NEW YOF	+	Create New Data Se	et	1	4 l	JS	
9 Berry Global Group Inc	BERY	NEW YOF				j	ο ι	JS	
10 Big Lots Inc	BIG	NEW YOR	K STOC	CK EXCHANGE, INC.	USA	1,049,860,00	4 l	JS	
11 British American Tobacco PLC ADR	BTI	NEW YOR	K STOC	CK EXCHANGE, INC.	GBR	101,219,557,64	1 1	JS	
12 Brookfield Property Partners LP	BPY	NASDAQ			USA	17,290,826,61	6 l	JS	
13 Cameco Corp	CCJ	NEW YOR	K STOC	CK EXCHANGE, INC.	CAN	3,749,029,24	8 l	JS	
14 China Unicom (Hong Kong) Ltd ADR	CHU	NEW YOR	K STOC	CK EXCHANGE, INC.	CHN	26,595,992,63	4 l	JS	

- 5. At the bottom of the window, click the **X** icons to remove the following data points:
 - Business Country, and
 - ► Currency ID.

Data Set Managem	ent				Cancel	Done	
Q Search for data point	nts Y						
Business Country							
Consider Buying							
Consider Selling							
Distribution							
Economic Moat							
Economic Moat Trend							
Exchange							
Your Current Data Po	int Columns 📶						Use this icon
Name	Ticker	Exchange	Business Country	Market Cap (day-end)	Currency ID	Stock	to remove these data points
	EDIT	EDIT	EDIT	× EDIT ×	EDIT X	EDIT	
18 Fabrinet		FN	NEW YORK STOCK EXCHANGE,	. INC. USA 1159186373	USD 31.30 -	-	

6. In the **Select Data Point** field, type **Fair**, then click **Fair Value Uncertainty**. The data point is added to the far right side of the data set.

Data Set Management	Cancel Done	
Select Data Point		
Q Fair		
Fair Value		
Fair Value Uncertainty		Note the term to
Price To Fair Value		search for, and the data point to select

7. **Drag-and-drop** the **Fair Value Uncertainty** data point until it is to the right of the Fair Value data point.

Data Set Management					(Cancel)	Done	
Q. Fair	Y						
air Value							
air Value Uncertainty							
our Current Data Point (olumns III						
Market Cap (day-end)	Stock Price (day-end)	Fair Value (day-end)	Fair Value Uncertainty Best (mo-end)	P/E Price Ratio (day- end)	Morningstar Rating (day-end)	Econ end)	After moving

8. Click **Done**. Notice the name of the data set changes from Equity Summary to Untitled Edited.

	5-Star Stock \vee					
	o ₅9 🖂 🖩 🛇 + 🕰 🖸	B 7	7 Data Set: Untitled — Edit	ted \vee	Edited means the data	
Name		Ticker Exchange		Busine Countr	set has been altered and must be saved to retain changes.	
	Abercrombie & Fitch Co Class A	ANF	NEW YORK STOCK EXCHANGE, INC.	USA		
	2 Adient PLC	ADNT	NEW YORK STOCK EXCHANGE, INC.	USA		
	3 Aegon NV ADR	AEG	NEW YORK STOCK EXCHANGE, INC.	NLD		
	4 AMC Networks Inc A	AMCX	NASDAQ	USA		
	5 American International Group Inc	AIG	NEW YORK STOCK EXCHANGE, INC.	USA		

Like a list or a screen, a custom data set is not automatically saved when it is created.

Saving a custom data set from the Grid allows you to see what a data set looks like in the before you commit to saving it. If you do not like something about the way it looks—perhaps you need to add one more column, remove a column, or rearrange the columns—you can always use the Data Set menu to edit the data set, and then save it. Do the following:

Exercise 2: Save a custom data set

1. Click the **Data Set** menu, then select **Save As**. The Enter a name to save changes dialog box opens.

	5-Star Stock \vee					Q Sear	ch for Cli	ents	
	o 59 ⊟ 🗓 🛇 + 🕰 🖸	B 7	~	Data Set: Untitled —	Edited \lor				
	Name	Ticker	Exi	Open Recently Viewed ⑦			Cap (day- end)	Bas Cur	
	· · · · · · · · · · · · · · · · · · ·			Equities Summary			,		
<u> </u>	1 Abercromble & Fitch Co Class A	ANF	NE	All Data Sets		>	,542,095	US	
	2 Adient PLC	ADNT	NE				,609,365	US	
	3 Aegon NV ADR	AEG	NE	Data Set Actions			1,834,679	US	The also este ates
	4 AMC Networks Inc A	AMCX	N/				,545,796	US	Use this selection
	5 American International Group Inc	AIG	NE	🖉 Edit			1,973,173	US	to save a
	6 Anheuser-Busch InBev SA/NV ADR	BUD	NE	TER Cause			758,654	US	CUSION UAIA SEL
	7 Athene Holding Ltd Class A	ATH	NE	□ Save			993 071	US	
	8 Aurora Cannabis Inc	ACB	NE	+ Create New Data Se	et		,387,844	US	
	9 Berry Global Group Inc	BERY	NE				1,156,000	US	
	10 Big Lots Inc	BIG	NEV	V YORK STOCK EXCHANGE, IN	NC. USA	1,04	9,860,004	US	
	11 British American Tobacco PLC ADR	BTI	NE\	V YORK STOCK EXCHANGE, IN	NC. GBR	101,21	9,557,641	US	
	12 Brookfield Property Partners LP	BPY	NA	SDAQ	USA	17,29	0,826,616	US	
	13 Cameco Corp	CCJ	NE\	W YORK STOCK EXCHANGE, IN	NC. CAN	3,74	9,029,248	US	
	14 China Unicom (Hong Kong) Ltd ADR	CHU	NE\	V YORK STOCK EXCHANGE, IN	NC. CHN	26,59	5,992,634	US	
	15 CoreCivic Inc	CXW	NE\	V YORK STOCK EXCHANGE, IN	NC. USA	2,07	1,071,614	US	

2. In the Enter a new data set name field, type Morningstar Equity Data Points.



3. Click Save.

In this exercise, you will open a saved list, but start from a blank data set to create a custom data set comprised of the following data points:

Exercise 3: Create a custom data set for funds

- Morningstar Rating
- ► Total Return (1Y mo-end)
- ► Total Return (3Y mo-end)
- ► Total Return (5Y mo-end)
- ► Alpha (1Y mo-end)
- Alpha (3Y mo-end)
- Alpha (5Y mo-end)
- ► Beta (1Y mo-end)
- ► Beta (3Y mo-end)
- ► Beta (5Y mo-end)
- Morningstar Risk
- ▶ Prospectus Net Expense Ratio, and
- ► Annual Net Expense Ratio.

You will also learn how to filter for data points specific to a particular data universe.

Do the following:

 The Grid should still be open. From the Screen Actions menu, open the Large Cap Funds list. Note that most of the columns are blank, because the Morningstar Equity Data Points column is intended for stocks, but the list you opened has mostly openend funds.

5-Star St	tock v				
√ 0 59	Screen Actions		Data Set: Morningstar Eq	juity Data P	
	🗁 Open		_		
Name	🖺 Save		hange	Business Country	Use this menu to
•	🖾 Save As				open a savea nat
1 Abercrom	⊠ Import List		W YORK STOCK EXCHANGE, INC.	USA	
2 Adient PL			W YORK STOCK EXCHANGE, INC.	USA	
3 Aegon NV	+ Create New List		W YORK STOCK EXCHANGE, INC.	NLD	
4 AMC Net	+ Create New Screen		SDAQ	USA	
5 American			W YORK STOCK EXCHANGE, INC.	USA	
6 Anheuser-		000	W YORK STOCK EXCHANGE, INC.	BEL	
7 Athene Hol	lding Ltd Class A	ATH	NEW YORK STOCK EXCHANGE, INC.	USA	
8 Aurora Can	inabis Inc	ACB	NEW YORK STOCK EXCHANGE, INC.	CAN	
9 Berry Globa	al Group Inc	BERY	NEW YORK STOCK EXCHANGE, INC.	USA	
10 Big Lots Inc	C	BIG	NEW YORK STOCK EXCHANGE, INC.	USA	
11 British Ame	erican Tobacco PLC ADR	BTI	NEW YORK STOCK EXCHANGE, INC.	GBR	
12 Brookfield	Property Partners LP	BPY	NASDAQ	USA	
13 Cameco Co	orp	CCJ	NEW YORK STOCK EXCHANGE, INC.	CAN	
🗌 14 China Unic	om (Hong Kong) Ltd ADR	CHU	NEW YORK STOCK EXCHANGE, INC.	CHN	

 From the toolbar above the grid, click the Data Set menu, then select Create New Data Set. The Data Set Management dialog box opens.

Name Ticker Exchange Morningstar Equity Data Points Fair Ve Best (e 1 American Funds Washington Mutual A AWSHX NASDAC Manager Research All Data Sets > 2 Bishop Street High Grade Inc Insti BSHGX NASDAC All Data Sets > > 3 Fidelity® Contrafund® FCNTX NASDAC All Data Set Actions > > 6 PRIMECAP Odyssey Growth POGRX NASDAC > Data Set Actions > > 7 Selected American Shares D SLADX NASDAC Save Use this commoto own data set	Large Cap Funds \checkmark		Data S	Set: Morni	Angstar Equity Data Poi	Search for nts ∨	r Clients	
Name Ticker Exchange 1 American Funds Washington Mutual A AWSHX NASDAG 2 Bishop Street High Grade Inc Instl BSHGX NASDAG 3 Fidelity® Contrafund® FCNTX NASDAG 4 Hartford Equity Income A HQIAX NASDAG 5 Pioneer Equity Income A PEQIX NASDAG 6 PRIMECAP Odyssey Growth POGRX NASDAG 7 Selected American Shares D SLADX NASDAG Save As Save As Use this comment to create your own data set			(Open Rece	itly Viewed ⑦		Fair Va Best (d	
□ 1 American Funds Washington Mutual A AWSHX NASDAC □ 2 Bishop Street High Grade Inc Instl BSHGX NASDAC □ 3 Fidelity® Contrafund® FONTX NASDAC □ 4 Hartford Equity Income A HQIAX NASDAC □ 5 Pioneer Equity Income A PEQIX NASDAC □ 6 PRIMECAP Odyssey Growth POGRX NASDAC □ 7 Selected American Shares D SLADX NASDAC □ Save Save Use this comm □ Save As • •	Name	Ticker	Exchange	Morninast	ar Equity Data Points	~	e	
2 2 Bishop Street High Grade Inc Insti BSHGX NASDAC 3 Fidelity® Contrafund® FCNTX NASDAC 4 Hartford Equity Income A HQIAX NASDAC 5 Pioneer Equity Income A PEQIX NASDAC 6 PRIMECAP Odyssey Growth POGRX NASDAC 7 Selected American Shares D SLADX NASDAC Image: stress of the stress of	1 American Funds Washington Mutual A	AWSHX	NASDAC	Manageri	esearch			
3 Fidelity® Contrafund® FCNTX NASDAC 4 Hartford Equity Income A HQIAX NASDAC 5 Pioneer Equity Income A PEQIX NASDAC 6 PRIMECAP Odyssey Growth POGRX NASDAC 7 Selected American Shares D SLADX NASDAC □ Save As □ Save As □ Create New Data Set □	2 Bishop Street High Grade Inc Instl	BSHGX	NASDAC	All Date 0				
4 Hartford Equity Income A HQIAX NASDAC 5 Pioneer Equity Income A PEQIX NASDAC 6 PRIMECAP Odyssey Growth POGRX NASDAC 7 Selected American Shares D SLADX NASDAC Image: Save As Save As Image: Hold American Shares D Stady	3 Fidelity® Contrafund®	FCNTX	NASDAC	All Data 5	ts	>		
□ 5 Pioneer Equity Income A PEQIX NASDAC □ 6 PRIMECAP Odyssey Growth POGRX NASDAC □ 7 Selected American Shares D SLADX NASDAC □ Save Image: Save As Use this comment to create your own data set	4 Hartford Equity Income A	HQIAX	NASDAC					
G PRIMECAP Odyssey Growth POGRX NASDAC ✓ 7 Selected American Shares D SLADX NASDAC ✓ Edit Save Use this comm to create your own data set ✓ Save As Verticate New Data Set Verticate New Data Set	5 Pioneer Equity Income A	PEQIX	NASDAC	Data Set A	tions			
□ 7 Selected American Shares D SLADX NASDAC Save Use this commuto create your own data set Use this commutation own data set	6 PRIMECAP Odyssey Growth	POGRX	NASDAC	// Edit				
Save Use this comm to create your own data set + Create New Data Set	7 Selected American Shares D	SLADX	NASDAC	P LUIL				
Save As Save As Outrate Your own data set				🖺 Save				Use this comman
+ Create New Data Set				🖾 Save A	S			to create your
				+ Create	New Data Set			own data set
							1	

3. At the bottom of the window, in the Your Current Data Point Columns area, only the Name data point is included. In the **Search for data points** field, type **rating**. Note that two instances of "Morningstar Rating" appear. This happens because the system isn't sure if you are looking for the Morningstar Rating for Stocks, or the Morningstar Rating for Funds.

Data Set Management			
Select Data Point			
Q rating X	V	Data Definition for Morning	
Morningstar Star Ratings Collection (Overall/3Y/5Y/10Y)		A quantitative assessme their Morningstar Categi	
Credit Rating Breakdown (Calculated)		with the top 10% assigne the next 22.5% 2 stars, a	A search for "rating" results in two instances
Morningstar Analyst Rating			of the same data points
Morningstar Rating			
Morningstar Rating	_		
Morningstar Return Rating			
Morningstar Risk Rating			
Your Current Data Point Columns			
Name			
4			

- 4. To the right of the Search for data points field, click the **Filter** icon.
- 5. Click Equity to deselect it.

Data Set Managem	ent	
Select Data Point		
Q rating	× X	
Morningstar Star Ra (Overall/3Y/5Y/10Y)	Filter by Investment Type	
Credit Rating Break	Select all	
Morningstar Analys	🥑 Open-End Fund	
Morningstar Rating	Insurance Fund	
Morningstar Return	🤣 Money Market Fund	
Morningstar Risk Ra	✓ Exchange-Traded Fund	Deselect any universe whose data
Morningstar Sustair	✓ Index	points you do not want to consider when building a custom data set
Vour Current Data	C Equity	

- 6. Click away from the Filter menu to close it. Only one instance of "Morningstar Rating" remains in the search results.
- 7. Click **Morningstar Rating**, then click **Overall**. The Morningstar Rating Overall data point is added to the Your Current Data Point Columns area at the bottom of the dialog box.

Data Set Management Select Data Point		
Q rating X	√ Period	
Morningstar Star Ratings Collection (Overall/3Y/5Y/10Y)	Add All (4)	
Credit Rating Breakdown (Calculated)	3 Years	
Morningstar Analyst Rating	5 Years	For some fields, you need to make additional choices in order to select
Morningstar Rating >	10 Years	the exact item you want
Morningstar Return Rating	Overall	
Morningstar Risk Rating		
Morninostar Sustainability Ratino		

8. In the **Search for data points** field, remove "rating," and type **return**.

9. Click **Total Returns (Mo-End) Collection - (YTD/1Y/3Y/5Y)**. Four data points are added to the Your Current Data Point Columns area.

Data Set Management		
Select Data Point		
Q return X	Data Definition for Total Returns (Mo-End) Collection - (YT	
Total Returns (Mo-End) Collection - (YTD/1Y/3Y/5Y) Total Return (Daily) Collection -	This is a collection of the following data points Total Return (YTD - mo-end) Total Return (1Y - mo-end) Total Return (1Y - mo-end)	Rather than making you select each of these data points individually, several collections of return-based data points are made available by default
(YTD/1Y/3Y/5Y) Total Returns (Qtr-End) Collection (YTD/1Y/3Y/5Y)	 Total Return (SY - mo-end) Total Return (SY - mo-end) 	
Calendar Year Returns Collection (2016/2015/2014/2013/2012)		
Gross Return (Mo-End) Collection		

10. Remove Total Return (YTD - mo-end).

Select Data Poin	t			
Q return	X Y			
Total Returns (Mc (YTD/1Y/3Y/5Y)	-End) Collection -			
Total Return (Dail (YTD/1Y/3Y/5Y)	y) Collection -			
Total Returns (Qtr (YTD/1Y/3Y/5Y)	-End) Collection			
Calendar Year Re (2016/2015/2014/	turns Collection 2013/2012)			
Gross Return (Mo (VTD/1V/3V/5V)	-End) Collection			
Your Current Dat	a Point Columns 🔟			
Name	Morningstar Rating Overall	Total Return (YTD - mo-end)	Total Return (1Y - mo-end) Annizd	Remove just this data poin
			5017	

- 11. In the **Search** field, remove "return" and type **alpha**.
- 12. Click Alpha (Mo-End) Collection (1Y/3Y/5Y). Three data points are added.

Data Set Management			
Select Data Point			
Q alpha	X)7	Data Definiti	As with return-based data, multiple collections of Alpha-based data points are
Alpha (Qtr-End) Collection (1Y/3Y/5Y)		This is a co	offered, to speed the creation of a custom data set
Alpha (Mo-End) Collection (1Y/3Y/5Y)		 Alpl 	
Alpha		 Alpi Alpi 	

- 13. In the **Search** field, remove "alpha" and type **beta**.
- 14. Click Beta (Mo-End) Collection (1Y/3Y/5Y). Three data points are added.

Data Set Management			
Select Data Point			
Q beta	X	Data Definition for Beta	
Beta (Qtr-End) Collection - (1Y/3Y/5Y)		This is a collection o	Be sure to select this option
Beta (Mo-End) Collection - (1Y/3Y/5Y)		 Beta Total (1 	
Beta		 Beta Total (5 Beta Total (5 	
Strategic Beta			
Strategic Beta Attributes			
Strategic Beta Group			

- 15. In the **Search** field, remove "beta" and type **expense**.
- 16. Click Annual Report Net Expense Ratio.



17. Scroll down and click Prospectus Net Expense Ratio.



 In the Search field, remove "expense" and type risk. From the list of options that appears, click once to select the Morningstar Risk data point, then click 5 Years.

Data Set Management		
Select Data Point		
Q risk X 7	Period	
Risk Factors Collection (36 Risk Factors)		_
	Add All (4)	Be sure to select the correct time period
MPT Risk Free Rate (Index Name)	3 Years	for this data point
Morningstar Risk >		
Morningstar Rick Bating	5 Years	
	10 Years	
Morningstar Risk and Return Ranks	Overall	
Morningstar Risk-Adjusted Return		
Risk Currency Name		

- 19. In the upper-right corner of the Data Set Management dialog box, click **Done**. The dialog box closes and the Grid is displayed.
- 20. From the **Data Set** drop-down menu, select **Save**. The Enter a name to save changes box opens.

	5-Star Stock $ \lor $					Q Sear	ch for Clie	ents	
\checkmark	0 59 🖂 🗓 🛇 + 🖓 🖄	B 7	7	Data Set: Untitled — E	dited ∨				
				Open Recently Viewed ⑦			Cap (day-	Bas	
	Name	Ticker	Exi	Fouities Summary			end)	Cur	
	1 Abercrombie & Fitch Co Class A	ANF	NE	All Data Sets		>	i,542,095	US	
	2 Adient PLC	ADNT	NE	An Data octa		<i>r</i>	,609,365	US	
	3 Aegon NV ADR	AEG	NE	Data Sat Actions			,834,679	US	
	4 AMC Networks Inc A	AMCX	N/	Data Set Actions			,545,796	US	Use this selection
	5 American International Group Inc	AIG	NE	🖉 Edit			1,973,173	US	custom data set
	6 Anheuser-Busch InBev SA/NV ADR	BUD	NE				,758,654	US	custom data set
	7 Athene Holding Ltd Class A	ATH	NE	Save			1,003,071	US	
	8 Aurora Cannabis Inc	ACB	NE	+ Create New Data Set			,387,844	US	l
	9 Berry Global Group Inc	BERY	NE				,156,000	US	
	10 Big Lots Inc	BIG	NEV	V YORK STOCK EXCHANGE, INC.	USA	1,04	9,860,004	US	
	11 British American Tobacco PLC ADR	BTI	NEV	V YORK STOCK EXCHANGE, INC.	GBR	101,21	9,557,641	US	
	12 Brookfield Property Partners LP	BPY	NAS	SDAQ	USA	17,29	0,826,616	US	
	13 Cameco Corp	CCJ	NEV	V YORK STOCK EXCHANGE, INC.	CAN	3,74	9,029,248	US	
	14 China Unicom (Hong Kong) Ltd ADR	CHU	NEV	V YORK STOCK EXCHANGE, INC.	CHN	26,59	5,992,634	US	
	15 CoreCivic Inc	CXW	NEV	V YORK STOCK EXCHANGE, INC.	USA	2,07	1,071,614	US	

21. In the Enter a new data set name field, type My Custom Fund Data Points. Then click Save.

Now that you have created a saved custom data set, you can share it with other users in your group or firm.

Exercise 4: Share a custom data set

☞ Note: You can share only custom data sets that you create.

Do the following:

1. Hover the cursor over Menu, then select Workspace>Data Sets. The Data Sets page opens.

Home		
Home >		
EXPLORE		
Morningstar Research		
Markets	ch for Clients, Securities, Reports, and Research	
CLIENT MANAGEMENT & ANALYSIS		
Clients & Accounts		
Prospects	113	
Billing	arting a spreadsheet report on:	
Redtail CRM	Your practice's overall	
► Reporting	() performance	
PRACTICE MANAGEMENT		
▼ Workspace	-	
Lists & Screens	Create Lists & Screens	
Models		
Custom Benchmarks	Market Value Name	Click here to star
Data Sets		

- 2. **Hover the cursor** over the **empty area** to the right of a custom data set name (in this case, Morningstar Equity Data Points). The Actions icon appears.
- 3. Click the **Actions** icon and from the **Data Sets** menu, select **Manage Sharing**. The Share dialog box opens.

	Data	Sets		○ Search for Clie	ents, Securities, Reports,	• 😃 🖉 (7) &
0/41 S	elected	🛛 🖾 Share 🏛 Dele	te				
This is manag	a colle e your	ction of your data sets. Use data sets.	when analyzing	lists, screens, or po	ortfolios. Utilize the action	icon or controls above to	
		Name		Owner	Created Date	Last Modified Date	
	10	Manager Research201	7-01-24 OF	Morningstar	01/24/2017	01/24/2017	•
	11	Morningstar Equity Data	Points	DC Test Indeper	nd 02/13/2020	02/13/2020	
	12	MPT Statistics (Month-E	Actions		03/03/2016	08/07/2018	
	13	MPT Statistics (Quarter-F	Rename		03/03/2016	08/07/2018	
	14	Performance & Risk 📿	Share		08/13/2018	08/13/2018	
	15	Performance & Risk 📿	Delete		01/12/2015	08/07/2018	

- 4. At the top of the Share dialog box, in the **Search** field, type one of the following:
 - ► colleague name
 - ► colleague email, or
 - ► group name.
- 5. Click Share.
 - ☞ Note: Shared data sets display the "Shared" tag next to the data set.

Customize Data Points in a Custom Data Set

One hurdle you might need to clear when building a custom data set is tuning each data point to show you exactly the information you want to see. This section's exercises teach you how to customize data points in a custom data set.

In this exercise, you will learn how to add the Price-to-Book and Price-To-Sales ratios to a custom data set for stocks. (The Price-to-Earnings ratio already exists as part of the data set.) This task requires you to do the following work:

- 1. Open and edit a saved custom data set
- 2. Filter for data points from a particular universe when building a custom data set, and
- 3. Change the settings for a data point.

Do the following:

 The Grid with the Gold-Rated Large Cap Funds list should still be open. Use the List Actions menu to open the 5-Star Stocks screen. Note that the columns for these investments display dashes; this is because the data points in the custom data set you just saved are for managed investments, and not equities.

	*****	Gold-Rated Large Cap Funds \vee						
(Sc	reen Actions	R	B 7	Data Set:	Manager Research	Read C	
	P	Open					Total Re	
	1.1	Save		Ticker	SecId	Morningstar Category	Cat 3	Lleo this monut
		Save As	-					open a saved list
	R	Import List		CAFAX	FOUSA02UTU	Large Growth		
	-	Import List		CAFCX	FOUSA02UTW	Large Growth		
	+	Create New List		CAFEX	FOUSA02UTX	Large Growth		
	+	Create New Screen		CAFFX	FOUSA02VNX	Large Growth		
				AMCPX	FOUSA00B49	Large Growth		
1	-			AMPCX	FOUSA02SPL	Large Growth		
		7 American Funds AMCAP F1		AMPEX	FOUSA02SQ2	Large Growth		
		8 American Funds AMCAP F2		AMCFX	FOUSA06VZ6	Large Growth		
		9 American Funds AMCAP F3		FMACX	F00000YDEB	Large Growth		
		10 American Funds AMCAP R1		RAFAX	FOUSA02V3N	Large Growth		
		11 American Funds AMCAP R2		RAFBX	FOUSA02UZA	Large Growth		
		12 American Funds AMCAP R2E		RAEBX	F00000U4B2	Large Growth		
		13 American Funds AMCAP R3		RAFCX	FOUSA02UX6	Large Growth		
		14 American Funds AMCAP R4	\odot	RAFEX	FOUSA02UZB	Large Growth		

Overview

Exercise 5: Customize data points for stocks

2. From the Data Set menu, in the Open Recently Viewed area, open the Morningstar Equity Data Points data set you saved earlier.

✓ 0 59 Image: Second										
_				Open Recently Viewed ⑦		ornings istainal				
	Name	Ticker	Secid	Manager Research	~	io-end)				
	1 Abercrombie & Fitch Co Class A	ANF	EOUSAOOT	Morningstar Equity Data Points						
	2 Adient PLC	ADNT	F00000XX;	Equition Summary						
	3 Aegon NV ADR	AEG	E0NLD002	Equilies Summary						
	4 AMC Networks Inc A	AMCX	F00000Mk	All Data Sets	>					
	5 American International Group Inc	AIG	E0USA002							
	6 Anheuser-Busch InBev SA/NV ADR	BUD	F000003V	Data Set Actions						
	7 Athene Holding Ltd Class A	ATH	F00000Y7(
	8 Aurora Cannabis Inc	ACB	F000000K2	& Edit						
	9 Berry Global Group Inc	BERY	F000000U	🖾 Save As						
	10 Big Lots Inc	BIG	E0USA005	+ Create New Data Set						
	11 British American Tobacco PLC ADR	BTI	E0GBR003	, Greate New Data Oct						
	12 Brookfield Property Partners LP	BPY	FOODOOPTL							
	13 Cameco Corp	CCJ	EOCANOOJ	x		_				
n	14 China Unicom (Hong Kong) Ltd ADR	CHU	E0CHN014	5U – – –		_				
	15 CoreCivic Inc	CXW	EOUSAOOXT	U – – –		_				

- 3. From the Data Set menu, click Edit. The Data Set Management window opens.
- 4. In the Search for data points field, type price.
- 5. Click **Price Ratio** twice. Two instances of the P/B Price Ratio (day-end) data point are added to the Your Current Data Point Columns area at the bottom of the window.

Data Set Management		
Select Data Point		
Q price	☑ Data Definition for Price Rati	
Market Price	his definition will be mad	Click this data point twice
Price Ratio		
Stock Price		

- 6. In the second instance of the P/B Price Ratio (day-end) data point, click **Edit**. The Price Ratio window opens.
- 7. From the Valuation per Share Type drop-down field, select P/S.

Price Ratio							
Time	End Date						
Most Recent	✓ Day End	I	~				
Decimal Places							
2	<u> </u>						
Valuation per Share Type	Display As						
Р/Е	∨ Value		×				
P/E 🗸	^						
Р/В	1						
P/S	Price Ratio (da	iy- Morningsta	Rating E	Economic Moat	(day- F	YE Ratio day-e	nd
Normalized P/E		(day-end)	e	end)			
P/FCF							

- 8. In the upper-right corner of the window, click **OK**.
- 9. **Drag-and-drop** the **P/E Price Ratio (day-end)** data point so it is just to the left of the P/B Price Ratio data point.

Data Set I	Management									Cancel	Done	
Q price		Y										
Market Pri	ice											
Price Ratio)											
Stock Price	e											
Your Curre	ent Data Point Column	s 111										
Your Curre end)	ent Data Point Column Fair Value	s ⁽ III) P/E Price Ratio) (day-	P/B Ratio c	lay-end	Morningsta	r Rating	Economic	Aoat (day-	P/E Ratio day	y-end	Drag this
Your Curre	ent Data Point Column Fair Value Uncertainty Best (mo-end)	s IIII P/E Price Ratio end)) (day-	P/B Ratio d	day-end	Morningsta (day-end)	r Rating	Economic N end)	Noat (day-	P/E Ratio day	y-end	Drag this data point to

- 10. In the upper-right corner of the window, click **Done**.
- 11. Click the **Data Set** menu, then select **Save As Data Set**. The Save Data Set As dialog box opens.

	5-Star Stock \vee				Q Search	for Cl
~	o 59 ⊟ 🖩 🛇 + 🕰 🖸	7 🖷 7	Data Set: N	Aorningstar Equity	Data Points — Ed	ited
			(Open Recently Viewe	d (?)	
	Name	Ticker	Exchange	Morningstar Equity	Data Points	
	1 Abercrombie & Fitch Co Class A	ANF	NEW YORK STOCK	Managar Basearch	Data i olinta	Ť
	2 Adient PLC	ADNT	NEW YORK STOCK	F V 0		
	3 Aegon NV ADR	AEG	NEW YORK STOCK	Equities Summary		
	4 AMC Networks Inc A	AMCX	NASDAQ	All Data Sets		>
	5 American International Group Inc	AIG	NEW YORK STOCK			
	6 Anheuser-Busch InBev SA/NV ADR	BUD	NEW YORK STOCK	Data Set Actions		
	7 Athene Holding Ltd Class A	ATH	NEW YORK STOCK			
	8 Aurora Cannabis Inc	ACB	NEW YORK STOCK	🖉 Edit		
	9 Berry Global Group Inc	BERY	NEW YORK STOCK	凹 Save		
	10 Big Lots Inc	BIG	NEW YORK STOCK	Save As		
	11 British American Tobacco PLC ADR	BTI	NEW YORK STOCK	- Create Nam Dat	. 0	
	12 Brookfield Property Partners LP	BPY	NASDAQ	- create New Dat	18 Set	
	13 Cameco Corp	CCJ	NEW YORK STOCK			
	14 China Unicom (Hong Kong) Ltd ADR	CHU	NEW YORK STOCK	EXCHANGE, INC. CH	IN 26,465,178,77	B US

- 12. In the name field, type Morningstar Data Plus Price Ratios, then click Save.
 - Note: You can edit data points for funds in the same manner as you edit data points for equities.

Nest Data Points Together

While building data sets in these exercises, you may have noticed that many common, related data points repeat the same information in their column header. This takes up unnecessary space on the screen. Fortunately, you can address this issue by using a feature called "nesting."

Nesting combines information from common data points under a single, shared header. This allows you to see more data points at once on the screen.

	Mixed Investments \lor					Q Se	arch for Clie	nts, Securities,	Reports, a) 🚑 🖌	0 2
\bigcirc	\checkmark 7 \square \square \bigcirc $+$ \bigcirc \square \square \square \square Data Set: Untitled – Edited \checkmark										Analytics 🔇
	Name	Ticker	Morningstar Category	Total Ret % Rank Cat 3Y mo-end (mo- end)	Morningstar Sustainability Rating (mo- end)	Morningstar Analyst Rating (day- end)	Total Return (3Y - mo- end)	Morningstar Rating Overall (mo-end)	Morningstar Rating 3Y (mo- end)	Morningstar Rating 5Y (mo- end)	Morningstar Rating 10Y (mo-end)
	1 1290 GAMCO Small/Mid Cap Value T	TNVCX	Small Blend	62	000	-	4.85	***	***	***	-
	2 1290 Global Talents A	TNYAX	World La	69	00	-	8.45	**	**	-	-
	3 1290 High Yield Bond A	TNHAX	High Yiel	44	-	-	5.18	***	***	***	-
	4 iShares Russell 2000 ETF	IWM	Small Blend	23	00	Bronze	7.25	***	****	***	***
	5 iShares Russell 2000 Growth ETF	IW0	Small Gr	59	000	Neutral	11.48	***	***	**	***
	6 iShares Russell 2000 Value ETF	IWN	Small Value	33	00	Neutral	2.97	***	***	****	***
	7 Schwab US Broad Market ETF™	SCHB	Large Blend	35	00	Gold	13.78	****	***	****	****

	Mixed Investments \lor					Q Se	arch for Clie	nts, Securiti	ies, Reports, a	Ĺ	<mark>9</mark> 🖉 🤅	
~	7 🖂 🛍 🛇 +	<u>.</u> Q	7 🛾 1	Data	Set: Untitle	d — Edited	\vee			Sho	w Peer Analyt	ics (
	Name	Ticker	Morningstar Category	Total Ret % Rank Cat 3Y mo-end (mo- end)	Morningstar Sustainability Rating (mo- end)	Morningstar Analyst Rating (day- end)	Total Return (3Y - mo end	Morningstar Overall	Rating (mo-end) 3Y	5Y	10Y	
	1 1290 GAMCO Small/Mid Cap Value T	TNVCX	Small Blend	62	000	-	4.85	***	***	***	-	
	2 1290 Global Talents A	TNYAX	World Lar	69	00	-	8.49	**	**	-	-	
	3 1290 High Yield Bond A	TNHAX	High Yield	44	-	-	5.18	***	***	***	-	
	4 iShares Russell 2000 ETF	IWM	Small Blend	23	00	Bronze	7.29	***	****	***	***	
	5 iShares Russell 2000 Growth ETF	IW0	Small Growth	59	000	Neutral	11.48	***	***	**	***	
	6 iShares Russell 2000 Value ETF	IWN	Small Value	33	00	Neutral	2.97	***	***	****	***	
_	7 Schwah US Broad Market ETETM	COUD	Large Pland	25	4949	Cold	12.70	****	***	****	****	

Notice how much less space is taken up in the bottom image by the same data points when nesting is turned on When creating the Gold-Rated Large Cap Funds data set, you added the Morningstar Rating Collection. In this exercise, practice nesting these data points together. To nest columns by data point, do the following:

Exercise 6: Nest columns by data point

- 1. The Grid should still be open. From the List Actions menu, open the Gold-Rated Large Cap Funds list. T
- 1. From the **Data Set** menu, click **Edit**.
- 2. In the Search for data points field, type Rating. Then select Morningstar Star Ratings Collection.

Data <mark>S</mark> et Manag	gement						
Select Data Point							
Q Rating		▽ Data De	finition for Mornir	igstar Star	Ratings Collection (Overall	//3Y/5Y/10Y)	
Morningstar Star Collection (Overal	Ratings I/3Y/5Y/10Y)	This is	a collection of th Morningstar Bat	e followin	g data points		Select this optio
Annual Report Ad Ope rating Expens	justed e Ratio	:	Morningstar Rat Morningstar Rat	ing 3Y (m ing 5Y (m	o-end) o-end)		
Credit Quality Bre	akdown >	•	Morningstar Kat	ing 10Y (r	no-end)		
Credit Rating Brea (Calculated)	akdown >						
Flagship Fund Ana	alyst Rating						
Morningstar Anal	yst Rating $>$						
Your Current Data	Point Columns	ſ					
Name	Ticker		Morningstar Category		Total Ret % Rank Cat 3Y mo-end (mo-end)	Morningstar Sustainabilit (mo-end)	
	EDIT	×	EDIT	×	FDIT	EDIT	

3. At the bottom of the Data Set Management window, click the **Nest** icon, then select **Nest By Data Point**.

Data Set Mana	agement			
Select Data Po	int			
Q Search for d	data points			
# of Holdings				
12b-1 Fee				
AOP				
Accounting Fee				
Acquired Fund	Expense			
Active Share Sc	core			
Actively Manag	ed			
Your Current D	ata Point Columns 🏢			Use this ontion
Name	Actions	cld	Morningstar	to nest data points together under
	Nest by Time Period		outogory	a common header
	Nest By Data Point	T	EDIT	×
4				

4. Click Done.

5. Scroll to the right to see how the Morningstar Rating For Funds collection data points have been consolidated under a common header.

	Mixed Investments \lor					Q Set	arch for Clie	nts, Securiti	es, Reports,	a Č	<u>9</u> 602
\checkmark	0 7 ⊟ 🖩 🛇 +	<u></u> Q	7 🛾 1	Data S	Set: Untitle	d — Edited	\sim			Sha	w Peer Analytics 🔇
	Total Ret % Morningstar Morningstar Rank Cat 37 Sustainability Analyst Total Return Morningstar Rating (mo-end) Morningstar mo-end (mo. Rating (day. (37 mat										
	Name	Ticker	Category	end)	end)	end)	end	Overall	3Y	5Y	10Y
	1 1290 GAMCO Small/Mid Cap Value T	TNVCX	Small Blend	62	000	-	4.86	***	***	***	-
	2 1290 Global Talents A	TNYAX	World Lar	69	00	-	8.4	**	**	-	-
	3 1290 High Yield Bond A	TNHAX	High Yield	44	-	-	5.18	***	***	***	-
	4 iShares Russell 2000 ETF	IWM	Small Blend	23	00	Bronze	7.25	***	****	***	***
	5 iShares Russell 2000 Growth ETF	IW0	Small Growth	59	000	Neutral	11.48	***	***	**	***
	6 iShares Russell 2000 Value ETF	IWN	Small Value	33	00	Neutral	2.9	***	***	****	***
	7 Schwab US Broad Market ETF™	SCHB	Large Blend	35	00	Gold	13.78	****	***	****	****
										Note the	



6. To save nested data points, from the **Data Set** menu, select **Save**.

Another option for nesting data points is to group them under a common header for the time period they represent. To nest data points by time period, do the following:

Exercise 7: Nest columns by time period

1. Be sure that the My Custom Fund Data Points data set is open. From the **Data Set** menu, select **Edit.**

	Gold-Rated Large Cap Funds \vee			○ Search for	r Clients, Sec	
\checkmark	0 676 ⊟ 🖩 🛇 + 🕰 🖄		Data	Set: My Custom Fund Data Points ∨		
	Nama	Tinkor	Sould	Open Recently Viewed ⑦	ngstar j 3Y (mo-	
		LICKCI	acciu	My Custom Fund Data Points	/	
	1 American Funds AMICAP 529A	CAFAX	FOUSA02	Manager Research		
	2 American Funds AMCAP 529C	CAFCX	FOUSA02			
	3 American Funds AMCAP 529E	CAFEX	FOUSA02	Morningstar Analyst Rating Data Points		
	4 American Funds AMCAP 529F1	CAFFX	FOUSA02	All Dat <mark>a</mark> Sets >	,	
	5 American Funds AMCAP A	AMCPX	FOUSAD			
	6 American Funds AMCAP C	AMPCX	FOUSA02	Data Set Actions		Po guro to opop
	7 American Funds AMCAP F1	AMPEX	FOUSA02		-	this data set
	8 American Funds AMCAP F2	AMCFX	FOUSAD	🖉 Edit		
	9 American Funds AMCAP F3	FMACX	F00000Y	Save As		
	10 American Funds AMCAP R1	RAFAX	FOUSA02	+ Create New Data Set		
	11 American Funds AMCAP R2	RAFBX	FOUSA02	,		
	12 American Funds AMCAP R2E	RAEBX	F00000U-	-		
	13 American Funds AMCAP R3	RAFCX	FOUSA02	JX6 Large Growth 90 🗲	rk	
	14 American Funds AMCAP R4	RAFEX	FOUSA02	JZB Large Growth 89 🗲	rk	
	15 American Funds AMCAP R5	RAFFX	FOUSA02	JZC Large Growth 86 🗲	r x	
	16 American Funds AMCAP R5E	RAEFX	F00000W	HL5 Large Growth 87 🗲	r x	
	17 American Funds AMCAP R6	RAFGX	F000002N	IDA Large Growth 86 🗲	r x	
	18 American Funds American Mutual 529A	CMLAX	FOUSA02	JVA Large Value 17 🛪	***	
	19 American Funds American Mutual 529C	CMLCX	FOUSA02	JVC Large Value 28 🗲	***	
	20 American Funds American Mutual 529E	CMLEX	FOUSA02	JVD Large Value 21 🛪	***	
	21 American Funds American Mutual 529F	CMLFX	FOUSA02	/00 Large Value 14 🗲	****	
	22 American Funds American Mutual A	AMRMX	FOUSADO	38C Large Value 16 🗲	***	
	23 American Funds American Mutual C	AMFCX	FOUSA02	SPJ Large Value 27 🛪	***	
	24 American Funds American Mutual F1	AMFEX	FOUSA02	SQC Large Value 17 🕨	***	

2. Click the Nest icon, then select By Time Period.

Data Set Mana	agement			
Select Data Po	int			
Q Search for o	data points			
# of Holdings				
12b-1 Fee				
AOP				
Accounting Fee				
Acquired Fund	Expense			
Active Share Sc	core			
Actively Manag	jed			
Your Current D	ata Point Columns 🎹			Use this option to nest data poin
Name	Actions	cld	Morningstar Category	together under a common heade
	Nest by Time Period			
	Nest By Data Point	T >	EDIT	×

3. Click **Done**. Note the consolidated headers, and the various data points appearing under each one.

Gold-Rated Large Cap Funds \vee			्र Search	Ç 🏹 🕄					
676 🖂 🖩 🛇 + 🕰 🗗		Data Set:	My Custom	Fund Da	ata Points —	Edited	\vee	Show Peer Analytics	
		1Y (mo-end	l)	3Y (mo-en	d)	5Y (mo-er	ıd)		1
Name	Morningstar Rating Overall (mo-end)	Total Return	Beta Total (excess return) Cat Curr	Total Return	Beta Total (excess return) Cat Curr	Total Return	Beta Total (excess return) Cat Curr	Alpha Total (excess return) (1Y - qtr-end) Cat Curi	
1 American Funds AMCAP 529A	***	16.25	1.03	13.25	0.99	10.84	0.98	-5.01	
2 American Funds AMCAP 529C	**	15.44	1.03	12.41	0.99	10.00	0.98	-5.71	
3 American Funds AMCAP 529E	**	16.01	1.03	13.00	0.99	10.60	0.98	-5.26	Note th
4 American Funds AMCAP 529F1	***	16.50	1.03	13.50	0.99	11.08	0.98	-4.81	annear
5 American Funds AMCAP A	***	16.30	1.03	13.33	0.99	10.93	0.98	-5.00	those d
6 American Funds AMCAP C	**	15.45	1.03	12.44	0.99	10.06	0.98	-5.68	these u
7 American Funds AMCAP F1	***	16.27	1.03	13.26	0.99	10.86	0.98	-5.03	1
8 American Funds AMCAP F2	***	16.60	1.03	13.56	0.99	11.16	0.98	-4.76	
9 American Funds AMCAP F3	**	16.69	1.03	13.68	0.99	-	0.98	-4.66	1
10 American Funds AMCAP R1	**	15.44	1.03	12.44	0.99	10.06	0.98	-5.74	1
11 American Funds AMCAP R2	**	15.44	1.03	12.44	0.99	10.07	0.98	-5.71	1
12 American Funds AMCAP R2E	**	15.78	1.03	12.79	0.99	10.44	0.98	-5.43	1
13 American Funds AMCAP R3	**	15.95	1.03	12.94	0.99	10.56	0.98	-5.25	1

4. To save this change, from the Data Set menu, click Save.