Finding Content from Morningstar Select in the Web-Based Versions of Morningstar Direct
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Finding Content from Morningstar Select in the Web-Based Versions of Morningstar Direct SM

The Select Equity content is being retired from the desktop edition of Morningstar Direct SM on October 31, 2019. All content from this module can be found in the web-based versions of Morningstar Direct. This document explains how to find each type of content in the following topics:

- Where is the latest Morningstar Analyst research feed for all equity articles? (page 4)
- Where are the Morningstar Analyst equity publications? (page 5)
- Where are the Morningstar Analyst company reports and notes? (page 7)
- Where are the Morningstar Videos for equities? (page 9)
- Where is the Morningstar valuation model for a stock? (page 10)

All of the most recent articles pertaining to equities can be found on the Latest page of the Morningstar Research portal. Further, users can filter the content here to see only stories related to equities. Do the following:

1. Login to https://direct.morningstar.com using the same email and password used to login to the desktop version of Morningstar Direct.
2. Hover the cursor over the Menu, then select Morningstar Research.

Where is the latest Morningstar Analyst research feed for all equity articles?
3. From the navigation pane to the left, click Latest.
4. In the Filter panel to the right, click Equity. Only videos pertaining to stocks now show.

The Publications page of the Morningstar Research portal offers access to the various sector and stockpicking newsletters, as well as Analyst presentations and more. Note that content on the Publications page is arranged in a series of tiles, which by default are arranged in alphabetical order. Click a tile to open it and see related articles.

The following content from the Select Equity tool is found via the Publications page:

- Market Outlook
- Research Highlights
- Analyst Presentations
- Sector Updates
- Equity Picklists and Best Ideas lists, and
- Observer Series

To find these publications, do the following:

1. Login to https://direct.morningstar.com using the same email and password used to login to the desktop version of Morningstar Direct.
2. Hover the cursor over the Menu, then select Morningstar Research.
3. From the navigation pane to the left, click **Publications**.
4. Click the appropriate **tile** to find the content you seek.

To find the specific publication you are looking for, reference the following table:

<table>
<thead>
<tr>
<th>For this publication…</th>
<th>Select this…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Outlook</td>
<td>Stock Market Outlook</td>
</tr>
<tr>
<td>Research Highlights</td>
<td>Equity Weekly Highlights</td>
</tr>
<tr>
<td>Analyst Presentations</td>
<td>Equity Analyst Presentations</td>
</tr>
<tr>
<td>Sector Updates</td>
<td>Sector Observer</td>
</tr>
<tr>
<td>Presentations</td>
<td>Equity Analyst Presentations</td>
</tr>
<tr>
<td>Observer Series</td>
<td>Markets Observer</td>
</tr>
</tbody>
</table>

5. To receive a notification whenever new content is added to that publication, click the **Follow** button.
Finding Content from Morningstar Select in the Web-Based Versions
of Morningstar Direct℠ Where are the Morningstar Analyst company reports and notes?

For stocks covered by a Morningstar Analyst, users can find both the Morningstar Analyst report for that company as well as any Analyst notes on the Analyst Research tab of either the Managed Investments or Equity Fund workbook. Stocks must belong to a list in order to be seen in a workbook. Do the following:

Note: If the stock whose valuation model you want to see belongs to a list in the desktop version of Morningstar Direct, then you can click the name of the list in the Lists & Screens widget on the Home page. Then skip to step 7 on page 11.

1. Login to https://direct.morningstar.com using the same email and password used to login to the desktop version of Morningstar Direct.

2. In the Lists & Screens widget on the Home page, click Create > List. The Create List dialog box opens.

3. In the Search by name or identifier field, enter the name, ticker, or other identifier for the stock.

4. Click the security’s name when it appears.

5. Repeat steps 3-4 to add more stocks to the list, if needed.
6. When finished, click Done. The Create List dialog box closes, and the Managed Investments workbook opens with the Grid showing.

7. Click the name of the stock whose valuation model you want to see. The Analytical View opens from the right with a series of tabs.

8. Click the Analyst Research tab.

9. To read the Morningstar Report, click Company Report. To read the latest notes from the Morningstar Analyst, click Analyst Notes. The content opens in the component.

   Note: To return to the previous view, click the Remove icon in the upper-left corner of the component.
To find Morningstar videos for equities, do the following:

1. Login to https://direct.morningstar.com using the same email and password used to login to the desktop version of Morningstar Direct.
2. Hover the cursor over the Menu, then select Morningstar Research.
3. From the navigation pane to the left, click Videos.
4. In the upper-right corner, click Show Filter.
5. In the Filter panel to the right, click Equity. Only videos pertaining to stocks now show.
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Where is the Morningstar valuation model for a stock?

For stocks covered by a Morningstar Analyst, users can find the Morningstar Analyst valuation model for that company by adding it to a list. Do the following:

1. Login to https://direct.morningstar.com using the same email and password used to login to the desktop version of Morningstar Direct.

2. In the Lists & Screens widget on the Home page, click Create > List. The Create List dialog box opens.

3. In the Search by name or identifier field, enter the name, ticker, or other identifier for the stock.

4. Click the security’s name when it appears.

5. Repeat steps 3-4 to add more stocks to the list, if needed.
6. When finished, click Done. The Create List dialog box closes, and the Managed Investments workbook opens with the Grid showing.

7. Click the name of the stock whose valuation model you want to see. The Analytical View opens from the right with a series of tabs.

8. Click the Analyst Research tab.

9. In the Qualitative Research component at the bottom of the Analytical View, click Cash Flow Model. Depending on which browser you are using, the Cash Flow Model file either automatically downloads, or you will be prompted to either open it or save it.