

DIGITAL RESOURCE GUIDE BUSINESS & INVESTING

MORNINGSTAR®

U.S. Market Barometer (1Y)

	Value	Gain	Drawn
Large	18.27	76.43	27.53
Mid	21.86	18.86	21.30
Small	16.13	18.58	18.82

Global Market Barometer (1Y)

Latest in Economic and Market

- How Much Will the Fed Cut Interest Rates?**
Our latest economic forecast for interest rates, inflation, and GDP growth.
Preston Gubwell • Sep 16, 2024
- What if the Fed Cuts Interest Rates by Half a Percent?**
Market odds now favor a more aggressive move.
Sarah Hansen • Sep 13, 2024
- CPI Report Clears the Way for a Fed Quarter-Point Rate Cut**
Despite slightly higher monthly reading on core inflation in August, the trend is looking better.
Tom Lauricella • Sep 11, 2024



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What is Morningstar Investing Center?

Morningstar can be used to analyze stocks, mutual funds, and exchange-traded funds (ETFs). You can use its data and reports to guide your investments; see how specific stocks and funds might work together in a portfolio; or learn about investing through articles, videos, and tutorials.

How to Access Morningstar

1. Go to the library's website, lincolnwoodlibrary.org
2. Hover over **Resources** and select **Quick Links**.
3. Select **Morningstar Investment Research Center**.
4. Enter your Lincolnwood library card number **21242000XXXXXX** and then select **Log In**.


Sign In to Investing Center

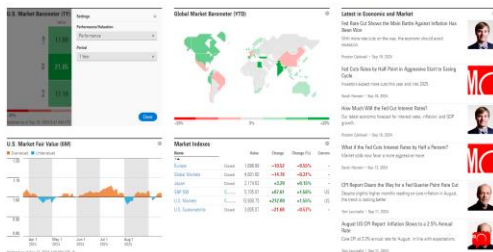
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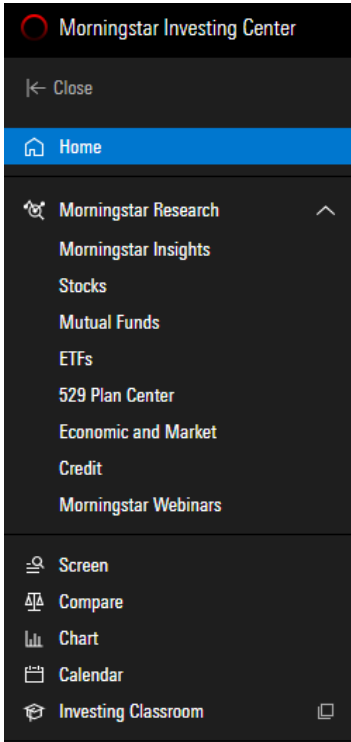
Sign In

Home

Once you log in, you will be taken to **Home** where you can view different market overviews and read articles written by Morningstar's writers. To filter what is shown in a particular section, select  in the upper right hand corner of the section.



Navigating the Side Menu



- To open or close the side menu, select → | or |←.
- To return the homepage, select **Morning Star Investing Center** at the top or **Home**.
- **Morningstar Research** provides resources and reports about specific types of investments.
- **Screen** allows you to screen securities based on criteria.
- **Compare** lets you compare securities.
- **Chart** allows you to chart the performance of investments.

- **Calendar** lets you track events like select earnings or stock splits.
- **Investing Classroom** provides resources like quizzes and self-study courses to help you grow your investing knowledge.

Searching

Use the search bar at the top to look up keywords or a specific security.

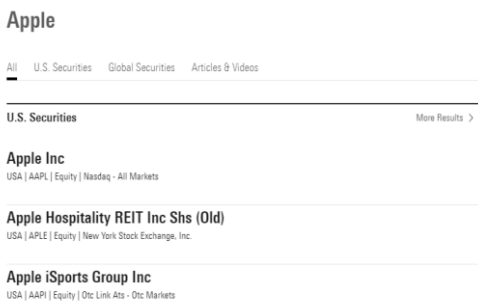


For more detailed instruction, book a one-on-one session with a librarian. Registration requires a Lincolnwood Library Card. For scheduling, contact Adult Services at (224) 233-1859.

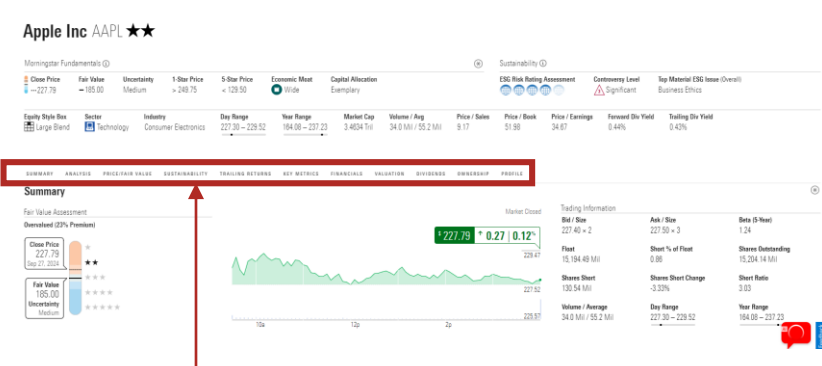


Once you have entered your search, you can either select one of the options from the drop down menu or select See All Results.

On the search results page, you can filter results by All, U.S. Senate, Global Securities, and Articles & Videos.

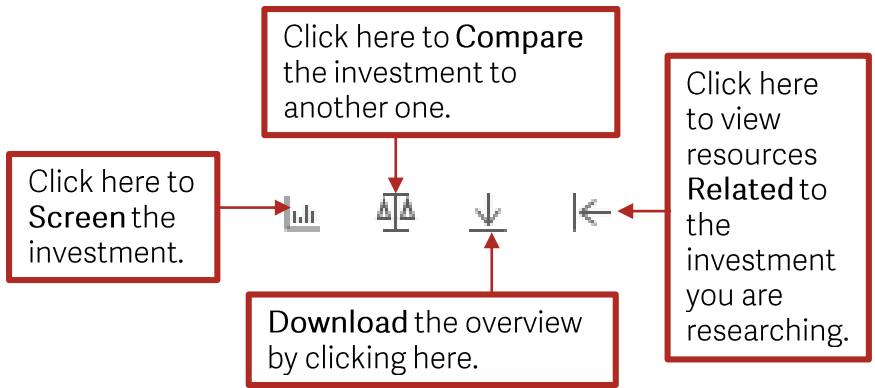


Selecting a security will open up an overview page.



You can jump to specific part of the page using the navigation bar.

In the upper right hand corner of the page, you will find the options menu to further your research.



Screening an Investment

A **screeener** is the financial industry term for advanced search. You can use the Morningstar screeners to find stocks, funds, and ETFs based on multiple specified criteria. For screens, you can use the basic options or many available filter tools.

You can find the filters to the left of the results page. Click on > to see a filter’s drop down menu. Once you have made your selections, click **Apply**.

Click here to download the results.

Click here to select what you would like included in the data set.

Click here to access related resources.

Screen	145,987 Securities	17 Data Set																																																																																
Filters Screen By Investment Type Investment Type Stocks Search Securities Classification Ratings Reference Valuation Profitability	<input type="checkbox"/> Ticker <input type="checkbox"/> 3457 8Do Holdings Co Ltd Shs <input type="checkbox"/> ONCD (Y Z) Quenco Ltd <input type="checkbox"/> ONE 01 Communique Laboratory Inc Common Stock <input type="checkbox"/> OONEF 01 Communique Laboratory Inc Common Stock <input type="checkbox"/> OFK 01 Communique Laboratory Inc Common Stock <input type="checkbox"/> OFK 01 Communique Laboratory Inc Common Stock <input type="checkbox"/> UNGF 010729 BC Ltd <input type="checkbox"/> Z29 029 Group SE <input type="checkbox"/> Z29 029 Group SE	<table border="1"> <thead> <tr> <th>Name</th> <th>Morningstar Rating for Stocks</th> <th>Sector</th> <th>Industry</th> <th>Stock Style Box</th> <th>Market Cap</th> <th>Base Currency</th> <th>ESG</th> </tr> </thead> <tbody> <tr> <td>8Do Holdings Co Ltd Shs</td> <td>★★★★</td> <td>Real Estate</td> <td>Real Estate Services</td> <td>Small Core</td> <td>146.1 Mi</td> <td>JPY</td> <td>Nons</td> </tr> <tr> <td>(Y Z) Quenco Ltd</td> <td>★★★★</td> <td>Consumer Cyclical</td> <td>Resorts & Casinos</td> <td>Small Value</td> <td>33.1 Mi</td> <td>ILS</td> <td>Nons</td> </tr> <tr> <td>01 Communique Laboratory Inc Common Stock</td> <td>★★★★</td> <td>Technology</td> <td>Software - Application</td> <td>Small Value</td> <td>2.9 Mi</td> <td>CAD</td> <td>Nons</td> </tr> <tr> <td>01 Communique Laboratory Inc Common Stock</td> <td>★★★★</td> <td>Technology</td> <td>Software - Application</td> <td>Small Value</td> <td>2.9 Mi</td> <td>USD</td> <td>Nons</td> </tr> <tr> <td>01 Communique Laboratory Inc Common Stock</td> <td>★★★★</td> <td>Technology</td> <td>Software - Application</td> <td>Small Value</td> <td>2.9 Mi</td> <td>EUR</td> <td>Nons</td> </tr> <tr> <td>01 Communique Laboratory Inc Common Stock</td> <td>★★★★</td> <td>Technology</td> <td>Software - Application</td> <td>Small Value</td> <td>2.9 Mi</td> <td>EUR</td> <td>Nons</td> </tr> <tr> <td>010729 BC Ltd</td> <td>★★★★</td> <td>Financial Services</td> <td>Shell Companies</td> <td>Small Value</td> <td>198.55B</td> <td>USD</td> <td>Nons</td> </tr> <tr> <td>029 Group SE</td> <td>★★★★</td> <td>Financial Services</td> <td>Asset Management</td> <td>Small Growth</td> <td>81.4 Mi</td> <td>EUR</td> <td>Nons</td> </tr> <tr> <td>029 Group SE</td> <td>★★★★</td> <td>Financial Services</td> <td>Asset Management</td> <td>Small Growth</td> <td>81.4 Mi</td> <td>EUR</td> <td>Nons</td> </tr> </tbody> </table>	Name	Morningstar Rating for Stocks	Sector	Industry	Stock Style Box	Market Cap	Base Currency	ESG	8Do Holdings Co Ltd Shs	★★★★	Real Estate	Real Estate Services	Small Core	146.1 Mi	JPY	Nons	(Y Z) Quenco Ltd	★★★★	Consumer Cyclical	Resorts & Casinos	Small Value	33.1 Mi	ILS	Nons	01 Communique Laboratory Inc Common Stock	★★★★	Technology	Software - Application	Small Value	2.9 Mi	CAD	Nons	01 Communique Laboratory Inc Common Stock	★★★★	Technology	Software - Application	Small Value	2.9 Mi	USD	Nons	01 Communique Laboratory Inc Common Stock	★★★★	Technology	Software - Application	Small Value	2.9 Mi	EUR	Nons	01 Communique Laboratory Inc Common Stock	★★★★	Technology	Software - Application	Small Value	2.9 Mi	EUR	Nons	010729 BC Ltd	★★★★	Financial Services	Shell Companies	Small Value	198.55B	USD	Nons	029 Group SE	★★★★	Financial Services	Asset Management	Small Growth	81.4 Mi	EUR	Nons	029 Group SE	★★★★	Financial Services	Asset Management	Small Growth	81.4 Mi	EUR	Nons
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Comparing Investments

On the Compare page, to compare securities, press + to add investments.

The screenshot shows the 'Compare' page interface. At the top left, there is a '+ ↓' button. Below it is a search bar labeled 'Add to Compare' with the placeholder text 'Search by Name or Ticker'. Below the search bar, there are three columns of investment data. The first column shows 'AAPL' with 'Base Currency' 'USD'. The second column shows 'AMZN' with 'Base Currency' 'USD'. The third column shows 'Alphabet Inc Class C' with a price of '165.04' and a change of '-3.45', and 'Base Currency' 'USD'. Two red boxes with arrows point to the '+ ↓' button and the 'Alphabet Inc Class C' entry, with text: 'Click here to download results.' and 'Click here to delete a specific investment.' respectively.

Charting Investments

On the Charts page, you can chart the performance of one or a few investments.

Use the search bar to add investments. Select X next to an investment's sticker to delete it from the chart.

Select **Data Type**, **Events**, **Indicators**, **Fundamentals** or **Display** to change what is shown on the graph.

Click to add your own points to the chart, to download the chart, to reset the chart, and to access settings.



Mo

Mo is Morningstar's AI chatbot designed to surface and summarize Morningstar's Independent Insights.



To start chatting with Mo, click on the red icon in the lower right hand corner of the screen. You will be first prompted to agree to the terms and conditions. Then type out your question or comment and click **Submit**.

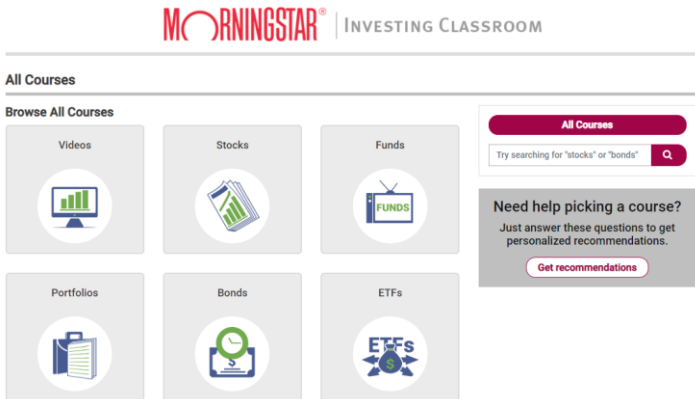
Note: Mo can provide misleading or incorrect advice. It is not designed to give investing advice.

Morningstar Investing Classroom

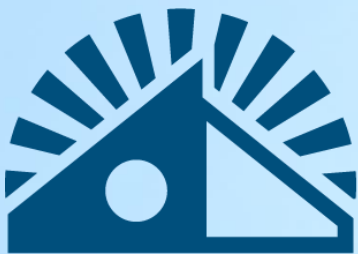
Morningstar Investing Classroom has many resources to help you grow your investing knowledge. You can find a course by browsing one of the modules or using the search option.

Don't know where to start? Morning Star also gives you an option to take a questionnaire to recommend you courses.

Investing Classroom



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