

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

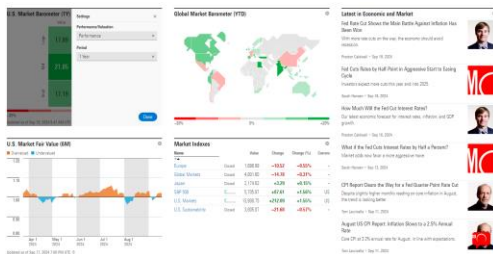
Library Name
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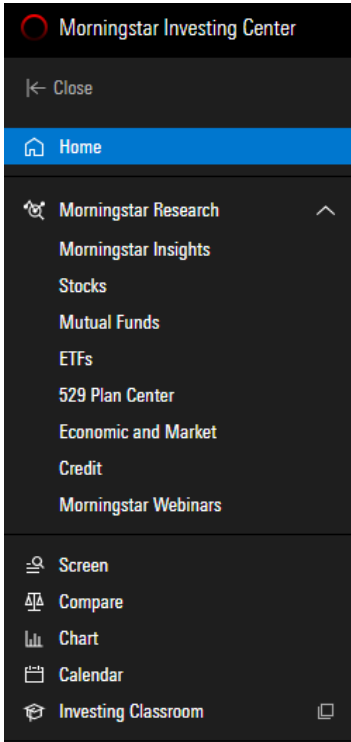
Sign In

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

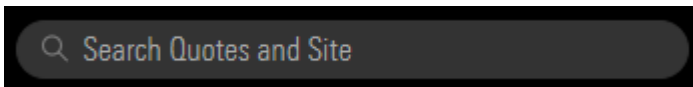


- To open or close the side menu, select → | or |←.
- To return the homepage, select **Morning Star Investing Center** at the top or **Home**.
- **Morningstar Research** provides resources and reports about specific types of investments.
- **Screen** allows you to screen securities based on criteria.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

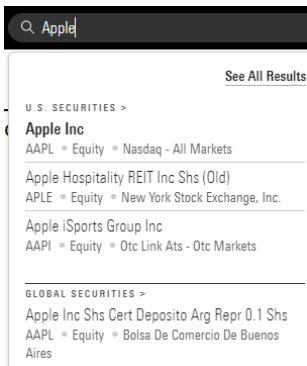
- **Calendar** lets you track events like select earnings or stock splits.
- **Investing Classroom** provides resources like quizzes and self-study courses to help you grow your investing knowledge.

Searching

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

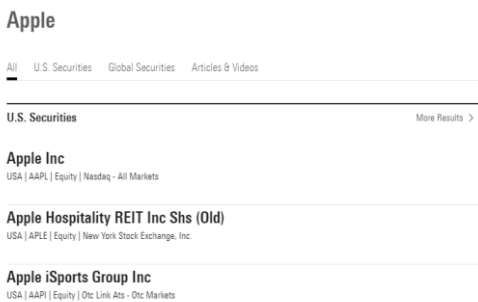


For more detailed instruction, book a one-on-one session with a librarian. Registration requires a Lincolnwood Library Card. For scheduling, contact Adult Services at (224) 233-1859.

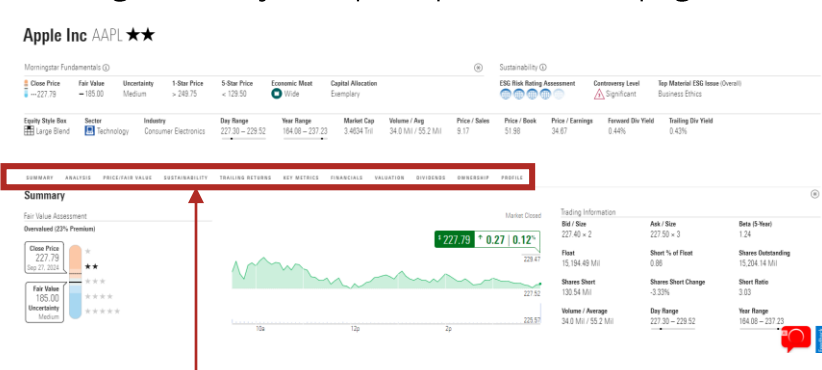


Once you have entered your search, you can either select one of the options from the drop down menu or select See All Results.

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

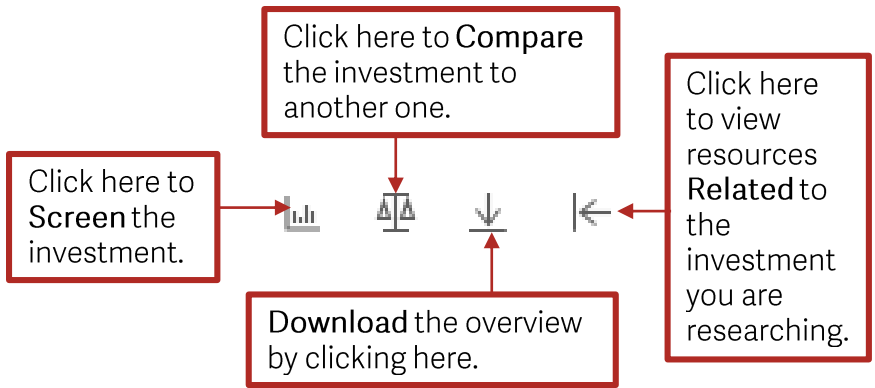


Selecting a security will open up an overview page.



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**.

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

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.

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 '+' icon and a downward arrow icon. A red box with an arrow points to the '+' icon, containing the text 'Click here to download results.' To the right, another red box with an arrow points to a close 'X' icon on a card, containing the text 'Click here to delete a specific investment.' Below these are three investment cards. The first card is for AAPL, the second for AMZN, and the third for Alphabet Inc Class C (GOOG). Each card shows the ticker, base currency (USD), and a price change. The GOOG card shows a price of 165.04 and a change of -3.45.

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**.

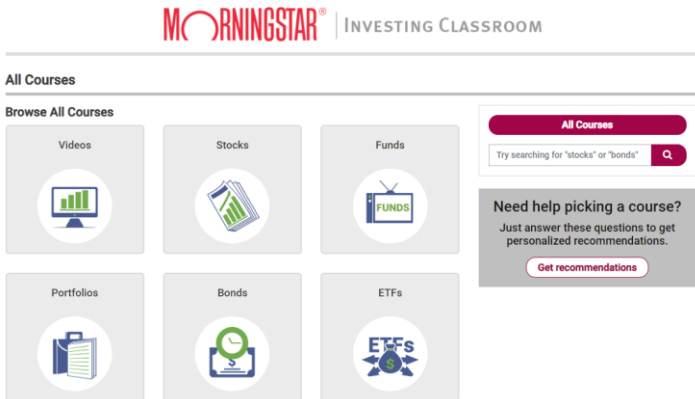
Note: Mo can provide misleading or incorrect advice. It is not designed to give investing advice.

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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