

# Morningstar® Investment Research Center<sup>SM</sup>

## Coverage Includes:

- ▶ 175,000 mutual funds
- ▶ 37,500 stocks
- ▶ 11,000 exchange-traded product
- ▶ 1,420 stock Analyst Reports
- ▶ 4,380 manager research Analyst
- ▶ Real-time data
- ▶ Educational materials

## The service is for:

- ▶ Public Libraries
- ▶ Academic Libraries
- ▶ Corporate Libraries
- ▶ Military Libraries

## For more information or a free trial:

+1 866 215-2509  
libraryservices@morningstar.com

## Ideal Investing Tool for Your Library Community

Morningstar® Investment Research Center<sup>SM</sup> is a service designed specifically for libraries to help patrons reach their investment goals.

It's a comprehensive tool that features financial information, reliable portfolio analysis, information about investment options, and up-to-date financial news and commentary.

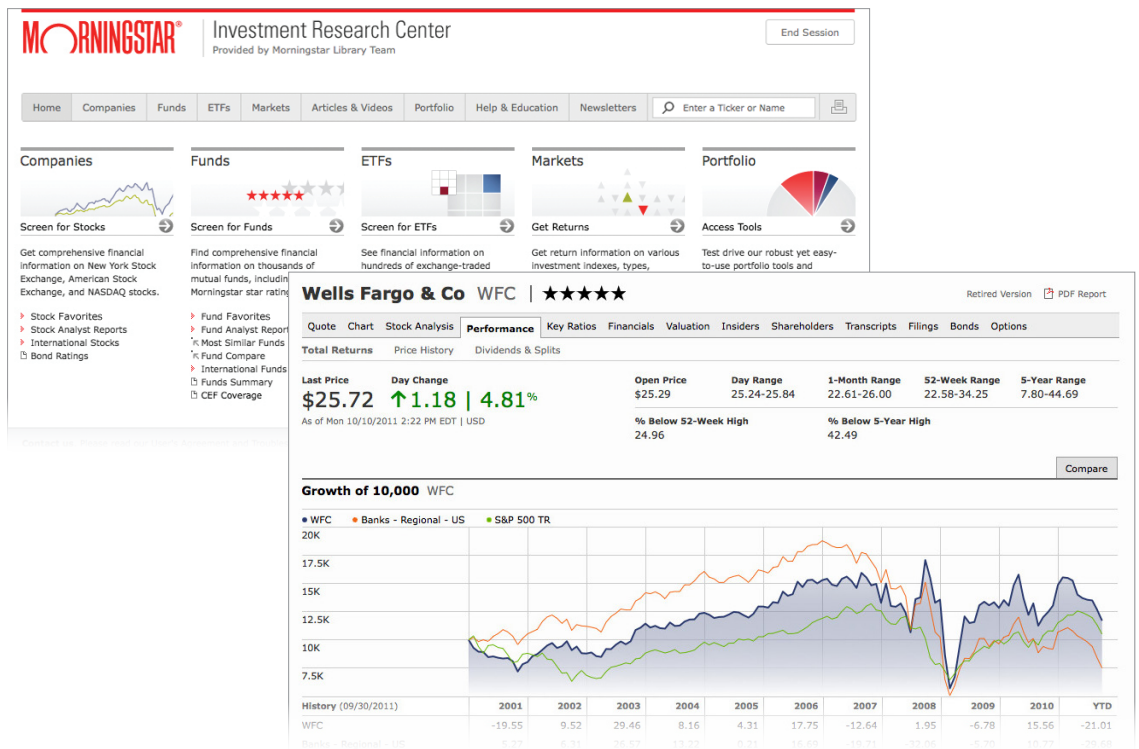
Morningstar Investment Research Center provides data on over 37,500 stocks, 175,000 open-end mutual funds, 11,000 exchange-traded funds, and 9,700 closed-end funds.

We also provide analyst reports on over 5,800 securities, offering in-depth background and analyst opinions on investments.

Libraries nationwide adopt Morningstar Investment Research Center for use in public and academic settings, for purposes such as personal investing, undergraduate and graduate programs, and corporate research. Take a free trial to see how Morningstar can enhance your library's financial resources.

## Morningstar Investment Research Center features include:

- ▶ Remote Access for users
- ▶ Video tutorials and webinar training programs
- ▶ Portfolio X-Ray Tool for analyzing holdings and exposure
- ▶ Morningstar® Portfolio X-Ray<sup>SM</sup> tool
- ▶ Client Site for tracking monthly usage statistics and accessing database training and promotional materials
- ▶ Articles and videos from Morningstar analysts



# Morningstar® Investment Research Center™ Overview

The screenshot shows the Morningstar Investment Research Center website. At the top, there is a navigation bar with tabs for Home, Companies, Funds, ETFs, Markets, Articles & Videos, Portfolio, Help & Education, and Newsletters. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area is divided into several sections: Companies, Funds, ETFs, Markets, and Portfolio. Each section has a 'Screen for' button and a brief description. The 'Articles & Videos' section is highlighted with a red box and a callout number 6. The 'Help & Education' section is highlighted with a red box and a callout number 7. The 'Newsletters' section is highlighted with a red box and a callout number 8. The search bar is highlighted with a red box and a callout number 9. The 'Companies' section is highlighted with a red box and a callout number 1. The 'Funds' section is highlighted with a red box and a callout number 2. The 'ETFs' section is highlighted with a red box and a callout number 3. The 'Markets' section is highlighted with a red box and a callout number 4. The 'Portfolio' section is highlighted with a red box and a callout number 5.

## Site Components

- Screeners** help users sort through thousands of stocks and funds. You can use your own criteria to create short lists of stocks, funds, and exchange-traded funds for further research.
- Stock and Fund Favorites** provide lists of Morningstar's top selections for companies and mutual funds.
- Stocks, Funds, and ETF Reports** include Morningstar's proprietary analysis on thousands of stocks, funds, and ETFs.
- Markets** highlights index, sector, industry, and fund category returns as well as monthly market outlook reports written by our team of analysts.
- Portfolio** provides access to a comprehensive suite of portfolio planning tools and guidance, including the Morningstar® Portfolio X-Ray<sup>SM</sup> tool, which interprets your asset allocation and compares your holdings to industry standards.
- Articles & Videos** features investing articles, videos, and daily market commentary from our analysts, editors, and outside sources.
- Help & Education** provides more information about database navigation, Morningstar methodology, and tools to improve your investing skills.
- Newsletters** contains an archive of Morningstar® FundInvestor<sup>SM</sup>, Morningstar® StockInvestor<sup>SM</sup>, Morningstar® ETFInvestor<sup>SM</sup>, and Morningstar® Dividend Investor<sup>SM</sup> newsletters.
- Ticker Lookup** allows you to enter a ticker symbol or company name and go directly to our detailed quote page.