

# Morningstar

## Mutual Funds Online

Morningstar provides access to updated full-page reports in PDF format on all 1,600 funds covered in Morningstar Mutual Funds. You can download the latest issue of the Morningstar Mutual Funds guide, select an entire group of funds to review, or find a specific fund under Search. Morningstar also provides top picks by its analysts. It takes 10 issues (or about 5 months) to cover all 1,600 funds in turn.

Most information on the side is provided as a PDF file. Help on using PDF files and hints for those with slower connections are included at the end of this guide.

### How do I access Morningstar?

- Go to the library's homepage: <http://library.stkate.edu>
- Go to **Find Articles** and click on **Databases and Indexes**.
- Using the alphabetical list, **Browse databases by title** and go to **M**.
- Click on **Morningstar Mutual Fund Online** link.
- You will see a special username and password listed. Make note of this information. If you access this database from off-campus, follow the directions to get the login information.
- Click on **Connect Now** to connect to the database.
- Click on the gray **Log In** button in the top right of the screen to log in. Enter the special username and password for this database.

\*Off-campus users will need to enter their CSC network or KateWay login to access the databases. Contact the HelpDesk (651-690-6402) for more help.

When you are done on the site, remember to click **Log Out**.

### Most Recent Issue

You can view the most recent issue of the Morningstar Mutual Fund Report through the links in the left-hand column. Each section is downloaded separately (and special reports are one report per link.)

Content includes the Summary Section (an index for the entire 10 issue volume along with additional information like top and bottom performers), analysis of the 170 funds in that issue, and special reports.

### Searching the Database

Search for reports using the Search box in the top left of the left column. You can search either the ticker symbol or the name of the company.

If your search results in a single name, the fund's report and information will open. If your search matches multiple reports, you will see a list of funds that include that name. Click on your choice to select it and open the report. The reports are saved as PDF files.

**Search**

Search for a report by entering a ticker or name



ie: FMAGX or Fidelity Magellan

## Reading Reports:

Morningstar uses a specific format for their reports in order to provide the most information in the least space possible. There are two guides to the reports.

- The Resource Guide (right column) is the comprehensive guide to Morningstar's reports.
- The FAQ link (right column at bottom) opens a small window. Select your question from the list. Answers only address that specific topic. Those with slower connections may prefer this option.

➔ Resource Guide



## Category Information:

Morningstar provides information on their analysts top picks (in the middle column), and below that links to reports on specific categories. Select the drop-down box for the top picks in the category of your choice. The link at the top right of the box (**What are Analyst Picks?**) gives more information about their choices.

Category information for all funds in a category is available below the analyst picks.

Analyst Picks		What are Analyst Picks?
Domestic-Equity ----Select One-----	Taxable Bond ----Select One-----	
International Equity ----Select One-----	Municipal Bond ----Select One-----	
Balanced ----Select One-----		

## PDF Files and Download Time:

Morningstar relies heavily on PDF files to provide information.

*Reading files:* You will need a PDF reader (such as Adobe Acrobat) in order to read almost all of the content from this source. Morningstar provides a link to the Acrobat reader in the bottom of the right-hand column: select **Download Acrobat Reader**, and you will be taken to the software site. If you need additional help reading PDF files, please contact the HelpDesk (651-690-6402).

*Slower connections:* PDF files can be quite large: some files on the Morningstar site may take more than 10 minutes to download. You may wish to use a faster connection at another location (such as St. Kate's or your local library) to access this information if you have a dial-up connection at home.

*Please ask a Reference Librarian or call the Reference Desk at 651-690-6652 for assistance.*