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Contents

Overview
Where are the latest Morningstar Analyst reports? 5
Where is the Morningstar Market Commentary?
Where are the Morningstar Analyst insights?
Where are the Investing Ideas?
Where are the Target-Date Fund Series reports?
Where is content related to Sustainability?
Where are the recorded webinars?
Where are the market statistics?
How can I screen to find investments?

Finding Content from the Analyst Research Center (ARC) in Morningstar Office Cloud

The Analyst Research Center (ARC) is being retired from the desktop edition of Morningstar OfficeSM on October 31, 2019. All content from this module can be found in Morningstar OfficeSM Cloud.

Overview

This document explains how to find each type of content from ARC in Morningstar Office Cloud via the following topics:

- ► Where are the latest Morningstar Analyst reports? (page 5)
- ► Where is the Morningstar Market Commentary? (page 6)
- ► Where are the Morningstar Analyst insights? (page 7)
- Where are the Investing Ideas? (page 8)
- ► Where are the Target-Date Fund Series reports? (page 9)
- ► Where is content related to Sustainability? (page 10)
- Where are the recorded webinars? (page 11)
- Where are the market statistics? (page 12)
- ► How can I screen to find investments? (page 12)

The most recent Morningstar Analyst reports for either equities or managed products 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 or manged products.

Where are the latest Morningstar Analyst reports?

To see this content, do the following:

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

Menu Home		
Home	>	
EXPLORE	M PNINCETAD Office C	Select this option from the menu.
Morningstar Research		
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Prospects		
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Redtail CRM		

- 3. From the navigation pane to the left, click **Latest**.
- 4. At the top of the page, click the **Reports** button.
- 5. In the Filter panel to the right, select an **option** to see only one type of report.

Menu Research			R. Search for Clients, Securities, Reports, a 👘 🚇 🕜 🤮	2
Featured	Latest Thematic Reports		Hide Filter	
Latest Publications Topics	Title PIMCO Short Asset Investment Insti PIMCO Short Asset Investment Insti PIMCO Extended Short Maxwin: Active ETE	Author Identifier Miri PAIDX, PAIP	Date Filter S hours Date Range Shares (1997)	Be sure to select the Latest page, and
Videos My Research	PINCO Investment Grade Corp Bd Insti	Miri PIGIX, PGCA	ago 6 hours ago Control Control Con	
Alerts Bookmarks	Moody's Wide Moat Affords Investors a Resilient Business Model	Coli MCO	2 days ago Focus	
► Lists & Screens	Delta Announces Partnership With LATAM Airlines, Eyeing Expansion Into South American Markets	Mat DAL	2 days Equity	Check a box to see
Active/Passive Barometer 4 Asset Flows Reports 4	Keurig Structural Headwinds Weigh on KDP Competitive Positioning: Merger Savings Support Valuation	Nic KDP	2 days Credit ago Manager	articles for only one type of investment.
Fund Flows	Structural Headwinds Detract From Keurig Dr Pepper's Positioning, but Synergies Support Valuation	Nic KDP	2 days ago Macro	

Stories under the Market Commentary section in ARC come from a third-party provider called Benzinga. This content can be found in Morningstar Office Cloud via the Markets workbook, on the News and Research tab. Additionally, note that the News component in Morningstar Office Cloud offers 10 additional sources for content compared to ARC.

Where is the Morningstar Market Commentary?

To access this content, do the following:

1. From the Menu, select Markets. The Markets - Overview workbook opens.

<u></u> ■ Menu	Home		
Home	>		
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- 2. Select the News and Research tab.
- 3. Click an article from the News component to read it.

Select this tab.		Click an article to read it.
🗮 Menu 🛛 Investment Analysis Markets 🛛 Overview 🗸		🔍 Search for Clients, Securities, Reports, a 🍡 💭 🎉 ⊘ ,
Market Overview Market Detail News and Research 🗸 Global Market Barometer Econo	mic Indicator	prs Earnings Calendar + Ed
Top Stories	$\mathbb{P}_{\!$	News = U.S. Markets
Mid-Morning Market Update: Markets Open Higher; Cal-Maine Foods Misses Of Expectations By Benzinga News Desk 30 Sep 2019 9:19AM Following the market opening Monday, the Dow traded up 0.38% to 26917.37 while the NASDA rose 0.51% to 7960.04. The SBP also rose, gaining 0.45% to 2975.14. Leading and Lagging Sectors Health care shares climbed 0.9% on Monday, Meanwhile, top gainers in the sector included Do Pharmaceuticals, Inc. (NASDA2: D0VA), up 38%, and Stealth BioTherapeutics Corp (NASDA2: MITO), up 17%. In trading on Monday, energy shares fell 0.4%. Top Headline Cal-Maine Foods Inc (NASDA2: CALM) reported weaker-than-expected results for its first quarter loss of 94 cents per share, which missed the analyst	1 Q va Q: ter.	Explore the Impact Economy, Finance and Trade Insights have on Business Strategy - Rese 11:09 AM ISD Stratically Cuts Review Cost and Time with LeanReview™ 11:07 AM ISD Stratically Cuts Review Cost and Time with LeanReview™ 11:07 AM ATLATL Named Leader in First G2 Visual Configuration Grid Report Into FAM Global \$170+ Billion Arf Freight [Domestic 6 International] Market Forecast, 2019-2023 - R 11:06 AM Mediawam. Strong Organic Growth of +29% in 11 2019 11:05 AM Resilience of Saudi Arabia's Credit Ratings Highlight The Kingdom's Intrinsic Strengths 11:05 AM Resilience of Saudi Arabia's Credit Ratings Highlight The Kingdom's Intrinsic Strengths 11:05 AM Resilience of Saudi Arabia's Credit Ratings Highlight The Kingdom's Intrinsic Strengths 11:05 AM Morgan Stanley Culimited Data for Satellite Internet Morgan Stanley Reletrates Underweight, \$41 Target On NetAPP As Firm Notes 'Channel ch 11:01 AM Global Strate Subdeweight, \$41 Target On NetAPP As Firm Notes 'Channel ch 11:01 AM Global Franklin Institute of Technology Announces Move to New Campus Location in D 11:01 AM Global Createrial Safety St 11:00 AM Global Createrial Safety St 11:00 AM
Latest Morningstar Research * Thematic	\$ \$	Latest Morningstar Notes • Equities and Funds

Users can find stories for stocks covered by a Morningstar Analyst on the Latest page.

To see this content, do the following:

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

Where are the Morningstar Analyst insights?

Menu Home		
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EXPLORE	M RNINGSTAR Office C	Select this option from the menu
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Clients & Accounts	- urte	2
Prospects		
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- 3. From the navigation pane to the left, click Latest.
- 4. At the top of the page, be sure the Thematic button is selected.
- 5. In the Filter panel to the right, select the **Equity** option to see only stock articles.

Menu Research				Q. Search	for Clients, Securities, Reports, a 👘 💭 🖆 🕐 👌	9
Featured		Latest Thematic Reports			Hide Filter	
Latest	\rightarrow	Title	Author	Date		
Publications		Corporate Bond Market Inured to	Dave Sekera, CFA	3 hours ago	Filter	Be sure to sele
Topics		Political Drama in Washington			Date Range	the Latest nam
Videos		The Market's Mispricing This Miner	Kristoffer Inton	5 hours ago	MM/DD/YYYY 🌼 MM/DD/YYYY (Apply)	with the Deper
		Third Quarter in U.S. Stock FundsA Mixed Bag	Tom Nations, CFP®	5 hours ago	▼ Securities	button selected
My Research Alerts		How to Create a Retirement Policy Statement	Christine Benz	6 hours ago	Q. Search securities	
Bookmarks		Inflation and Your Retirement	Mark Miller	6 hours ago	Focus	
► Lists & Screens		Weekly Wrap: Top Growth Ideas, Big	Jess Liu	2 days ago	C Equity	
▼ Following		Tobacco, Bonds vs. Cash				Check this box
Active/Passive Barometer		A Primer on Prepaid 529 Plans	Morningstar.com	2 days ago	Credit	only stock artic
Asset Flows Reports	90	The Week Ahead: Earnings From Pepsi and Costco, Unemployment Rate Reports	Jess Liu	2 days ago	Manager	, , , , , , , , , , , , , , , , , , , ,
Fund Flows Kevin McDavitt, CFA	90 (1)	A Weekly Summary of Our Best Ideas and Developments in the Companies We	Morningstar	2 days ago	Macro	

The Investing Ideas section in ARC shows users the two cheapest stocks in each sector (as of the previous market day's closing price). Similar (but broader) content can be seen in Morningstar Office Cloud by reading one of the two following publications:

Where are the Investing Ideas?

Publication Name	Description
Equity Weekly Highlights	This content surfaces the current favorite stocks of Morningstar Analysts, addresses big-picture trends, and highlights significant ratings changes.
U.S. Equity Pick Lists	Every month, this publication reviews and updates Morningstar stock analysts' best investment choices among U.S. equities. These recaps offer commentary on changes within the Pick List portfolio, valuations and recommended sector weightings.

To see this content, do the following:

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

Menu Home		
Home >		
EXPLORE		Select this option from the menu.
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- 3. From the navigation pane to the left, click **Publications**.
- 4. Click either the Equity Weekly Highlights or U.S. Equity Pick Lists tile.

Menu Research			9	Search for Clients, Securities, Report	s.e 🔰 🖉 🖉 🖉	
Featured	Publications				C Show Filter	
Latest Publications Topics Videos	Asia Equity	Australian	Canada Equity	DividendInvestor	Equity Weekly	Select this tile, or scroll down to select the U.S. Equity Pick Lists.
My Research Alerts	FICK LISIS	Survey	FICK LISTS		rigingina	
Bookmarks ► Lists & Screens	22 days ago	2 years ago	a month ago	10 days ago	3 days ago	
* Following	MANAGER	MANAGER	COUITY	MANAGER	MANAGER	
Active/Passive Barometer 52 Asset Flows 65 Fund Flows 65 Keein MrDevitt. CFA 63	ETF Specialist	ETFInvestor	Europe Equity Pick Lists	Fund Analyst Rating Roundups	Fund Spy	

5. Click an **article** to read it.

The Target-Date Fund Series reports are found on the Publications page.

To see this content, do the following:

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

Where are the Target-Date Fund Series reports?

Menu Home		
Home >		
EXPLORE		Select this option from the menu.
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- 3. From the navigation pane to the left, click **Publications**.
- 4. Click the Target-Date Fund Series Reports tile.

Menu Research		🔍 Search for Clients, Securities, Reports, a 👘 🖉 🙆					
Featured	Publications				C Show Filter		
Latest	c mana aga	0 110 11 0 20		10 0011 020	r minus alla		
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Topics Videos	Rekenthaler Report	Stock Analyst Updates	Stock Market Outlook	Stock Strategist	StockInvestor		
My Research Alerts				Ŭ			
Bookmarks						Select this tile to see the	
► Lists & Screens	3 days ago	12 days ago	2 months ago	6 hours ago	19 days ago	Target-Date Fund Series rep	
* Following							
Active/Passive Barometer	MANAGER	MANAGER	CREDIT	EQUITY	MANAGER		
Asset Flows Reports	Target-Date	U.S.	U.S. Credit	U.S. Equity	U.S. Fund		
Varia McDuritt CEA	Fund Series	Active/Passive	Insights	Pick Lists	Flows Monthly		
Sheryl Rawling	2 Reports	Barometer			Reports		
	a month ago	4 days ago	3 hours ago	a month ago	14 days ago		

5. Click an **article** to read it.

Content related to the topic of Sustainability is found on the Topics page. To see this content, do the following:

Where is content related to Sustainability?

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

Menu Home		
Home >		
EXPLORE		Select this option from the menu.
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- 3. From the navigation pane to the left, click **Topics**.
- 4. Click the Sustainable Investing tile.

Menu Research			Q Search for Clients, Securities, Report	
Featured	Topics			
Latest		— betalR1×		
Publications	3221 Documents	503 Documents 2 Days Ago	1726 Documents 7 Hours Ago	
Topics >				
Videos	Private Investment	Rating Ourselves	Retirement Readiness	
My Research Alerts Bookmarks ► Lists & Screens ▼ Following	PitchBook	23 Documents	912 Documents 7 Hours Ago	Select this tile to see content on Sustainable Investing.
Active/Passive Barometer 9+ Asset Flows Reports 9+	Strategic Beta	Sustainable Investing	Taxes	
Fund Flows 9+			1040	
Kevin McDevitt, CFA 9+				
Sheryl Rowling 2			401(k)	
	143 Documents 2 Days Ago	234 Documents 2 Days Ago	321 Documents 4 Days Ago	

5. Click an **article** to read it.

To watch a recorded webinar from the Morningstar Analyst team, do the following:

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

2. Hover the cursor over the Menu, then select Morningstar Research.

Where are the recorded webinars?

- E Menu Home Home Select this option from the menu. EXPLORE MORNINGSTAR Office Morningstar Research Markets ch for Clients, Securities, Reports, and Research... CLIENT MANAGEMENT & ANALYSIS Clients & Accounts orts Prospects Billing rting an excel report on: Redtail CRM
- 3. From the navigation pane to the left, click **Publications**.
- 4. Select the Webinar Replays tile.

Menu Research			
Featured	Publications		
Latest			
Publications >	3 days ago	12 days ago	
Videos	MANAGER	MANAGER	
My Research Alerts Bookmarks	Target-Date Fund Series Reports	U.S. Active/Passive Barometer	
► Lists & Screens			Select this tile to watch
▼ Following	a month ago	4 days ago	a recorded webinar.
Active/Passive Barometer9+Asset Flows Reports9+Fund Flows9+Kevin McDevitt, CFA9+Sheryl Rowling2	Webinar Replays		
	3 months ago		

5. Click a video to watch it. It will begin playing automatically.

The market statistics found in ARC can be found in the Markets workbook in Morningstar Office Cloud.

Where are the market statistics?

To see this content, do the following:

1. From the Menu, select Markets.

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Home	>	
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Morningstar Research		Select this option from the Menu.
Markets		
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Clients & Accounts	ractice Manag	
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► Reporting		

2. Select the tab containing the information you want to see. Use the Markets exercise guide to learn more about using this part of Morningstar Office Cloud.

The screening capability in Morningstar Office Cloud is far more robust than the version found in ARC. To learn how to create a screen to find investments in Morningstar Office Cloud, please use the Creating Screens exercise guide.

How can I screen to find investments?

Note: To find a Fund Provider in the Morningstar Office Cloud Screener window, use the data point Branding Name. Select one or multiple options.

Screener				Cancel	Done
0/12 +	 Create your Universe 			C Logic Mode	Ъí
American Funds American Mutual A	Investment Type: Open-End Fund,	Investment Type: Open-End Fund, Exchange-Traded Fund			
American Funds Fundamental Invs A American Funds Invmt Co of Amer A	Domicile: United States	Domicile: United States			×
American Funds Washington Mutual A Fidelity Advisor® Capital Development 0	Branding Name: American Funds	E Branding Name: American Funds , Fidelity			×
Fidelity Advisor* Growth & Income I	I Morningstar Analyst Rating (da	I Morningstar Analyst Rating (day-end): Bronze, Gold, Silver			×
Fidelity Advisor* Large Cap I Fidelity* Equity-Income	Oldest Share Class		Value: Yes		×
Fidelity ^e Growth & Income Fidelity ^e Large Cap Stock	Inception Date: Before		Value: 01/01/2009		×
Fidelity* Low-Priced Stock	ii Morningstar Category: Large Bler	ii Morningstar Category: Large Blend, Large Growth, Large Value, Mid-Cap Blend, Mid-Cap Growth, Mid-Cap Value, Small Blend, Sm) ×
Fidelity* value Discovery	I Fund Yield (mo-end)			¢ 🗖	к
	Operator	Value			
	Greater than or Equal to	Allow Missing Values			
	O Greater than	Value			
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