Creating Investment Alerts in Morningstar Direct

Onboarding Guide

Morningstar Direct

Contents

Creating Investment Alerts in Morningstar Direct^{SM}

Overview

Morningstar Direct^{SM} allows users to create alerts to be notified of any significant changes – such as a manager change or a Morningstar Rating change – for an investment of your choice. The following types of alerts can be created:

- Price alerts
- Morningstar alerts, and
- Filings alerts.

This guide shows users how to create each alert type with the following exercises:

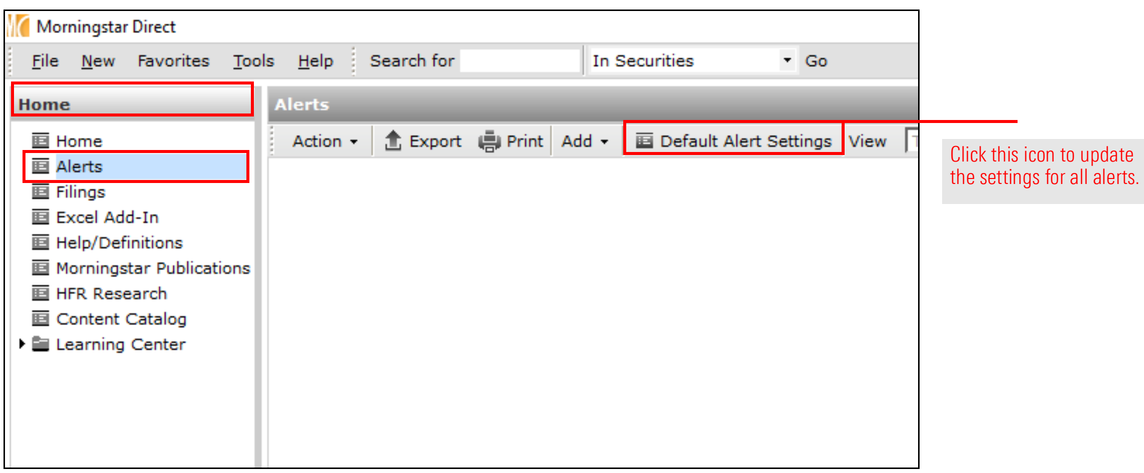
Exercise 1: Update the default settings for alerts

Prior to creating alerts, it is recommended to review the settings for alerts. Users can add up to 25 additional email addresses, separated with a comma. By doing so, all recipients will receive all alerts you set up under the Alerts section. The following table describes the settings users can alter for alerts:

This option…	Does the following…
Additional Email Address	Enter up to an additional 25 email addresses of others to receive an email when an alert is triggered. Separate each email address with a comma and no space.
Make Alert Inactive	Check this box to set an alert to be inactive once it is triggered. Leave the box unchecked to have the alert trigger if the value is met again in the future.
Send email	Check this box to receive an email yourself when an alert is triggered. (Otherwise, triggered alerts can be seen from the Home > Alerts page.)
Auto Delete Triggered Results after 30 days	Check this box to automatically remove triggered alerts from the Home > Alerts page after 30 days. Otherwise, users need to manually delete these items.

To review or change alert settings, do the following

1. Select the **Home** module, then select the **Alerts** page.
2. From the toolbar, click **Default Alert Settings**. The Alert Details dialog box opens.



3. Click **Save**.

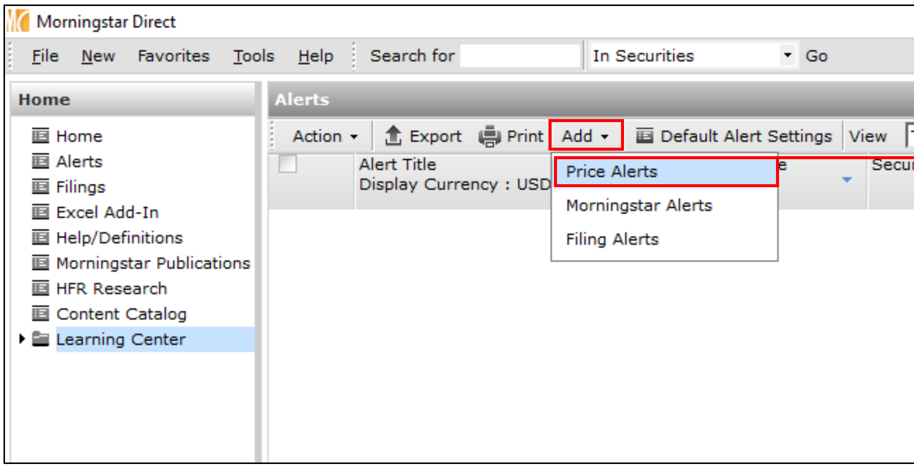
Exercise 2: Create a price alert for a stock

Users can set an alert for securities to know if the price of the investments went up or down by a certain percentage amount. Investments must be manually added for a price alert; users cannot monitor a list, for example, to watch all items saved there.

☞ Note: Other options for price alerts are also available.

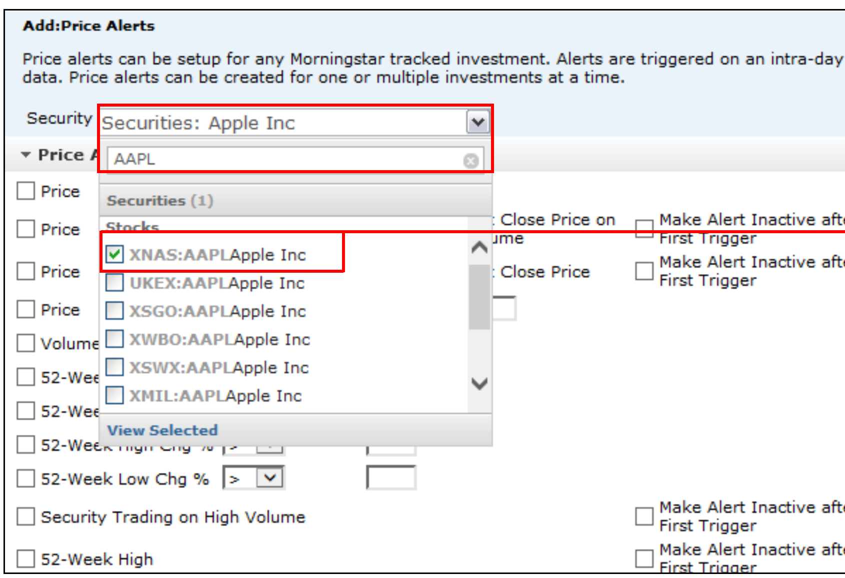
To create an alert for a price change for a collection of stocks, do the following:

1. The **Alerts** page in the Home module should be selected.
2. From the toolbar, click **Add** > **Price Alerts**. The Add: Price Alerts dialog box opens.



Select this option to create a price alert for investments.

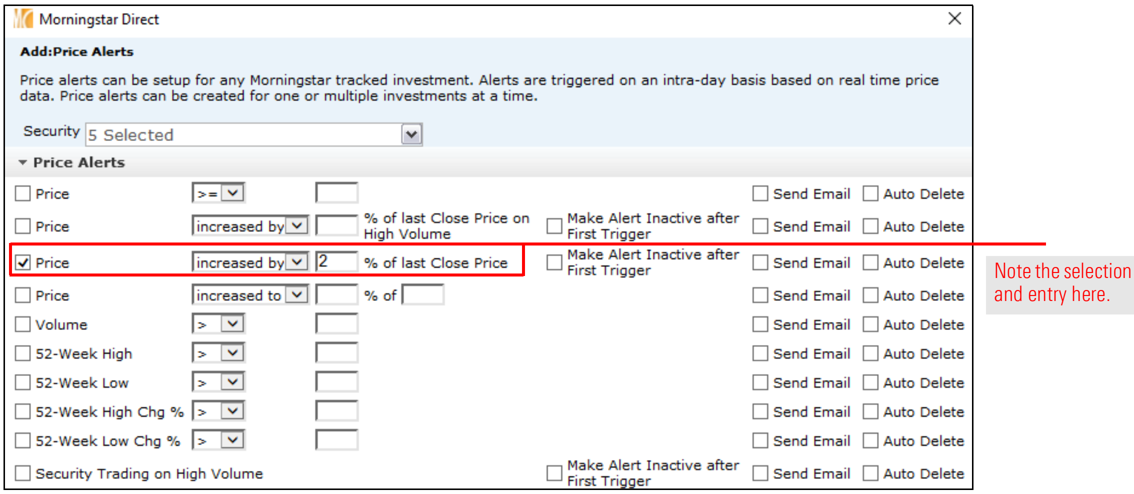
3. From the **Security** drop-down field, search for **AAPL**.
4. Select the **checkbox** to the left of the stock trading on the Nasdaq.



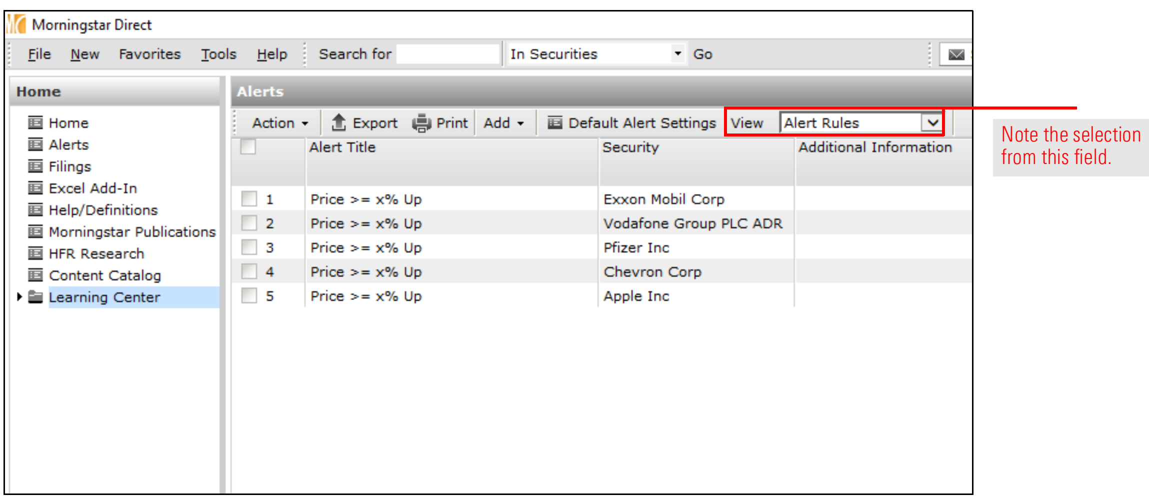
Be sure to select the correct security when setting alerts.

5. Remove **AAPL** from the Search field.

6. Repeat steps 3-5 to search for and select the following stocks:
   - CVX (trades on the New York Stock Exchange)
   - PFE (trades on the New York Stock Exchange)
   - VOD (select the ADR trading on the Nasdaq), and
   - XOM (trades on the New York Stock Exchange).
7. Click away from the Security field to close it.
8. Select **Price >= 2% of last Close Price**.



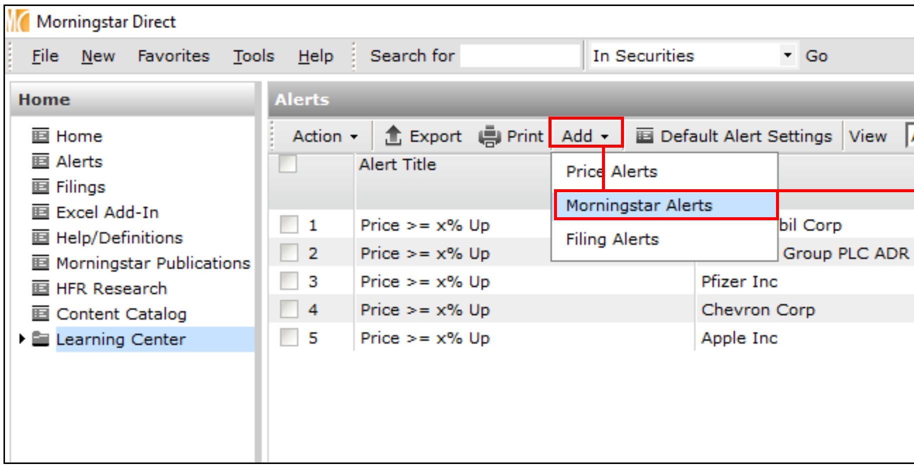
9. Click **Save**. You are returned to the Alerts page.
10. From the toolbar, use the **View** drop-down field to select **Alerts Rules**. The newly created alerts display on screen.



Exercise 3: Create a Morningstar Alert

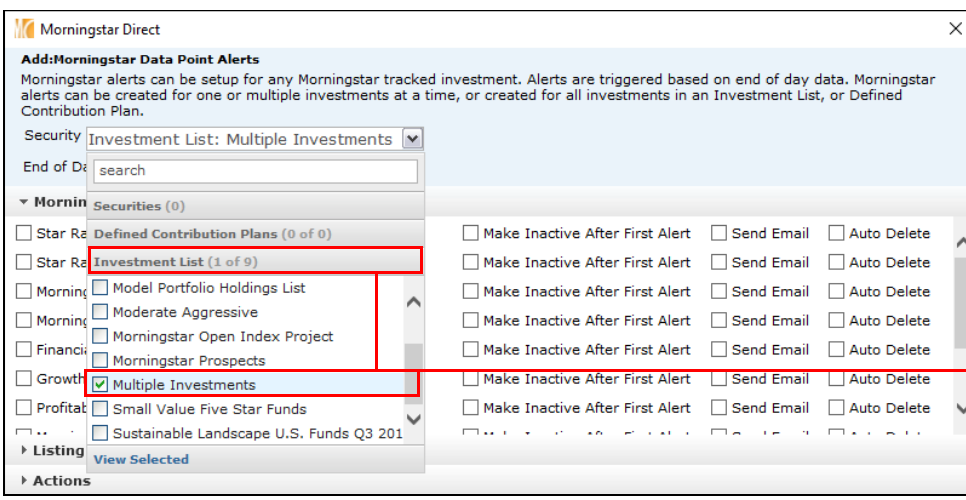
Morningstar Alerts flag any changes to Morningstar ratings, peer group classifications, Equity and Fixed Income Style boxes, and much more. This exercise shows users how to select an Investment List saved in Workspace, and apply multiple alerts for the selected securities. To create a Morningstar Alert, do the following:

1. The **Alerts** page in the Home module should be selected.
2. From the toolbar, click **Add** > **Morningstar Alerts**. The Add: Price Alerts dialog box opens.



Select this option to create Morningstar Alerts for a list.

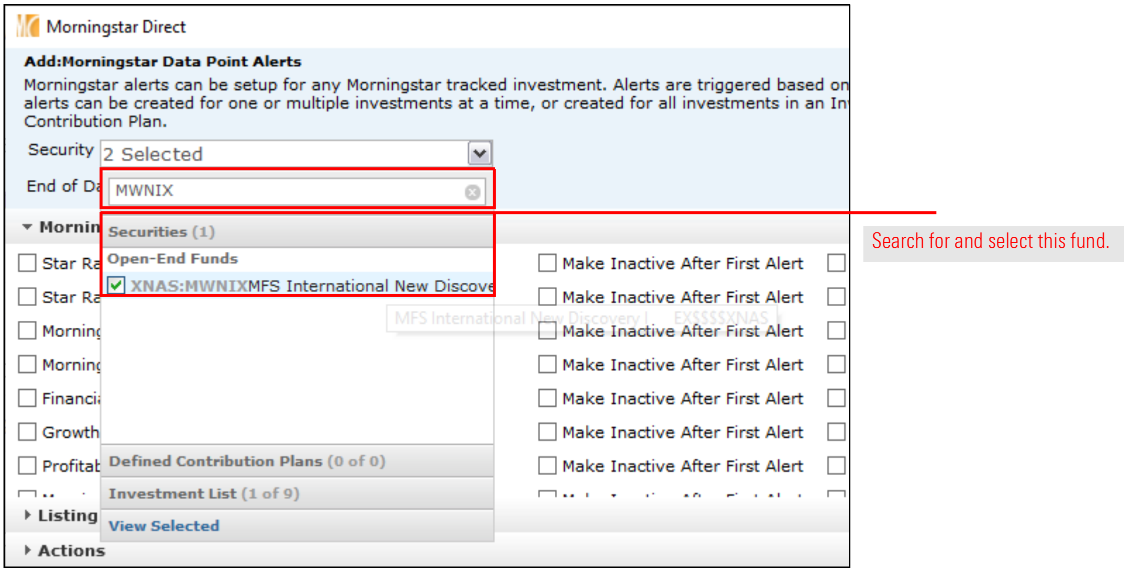
3. From the **Security** drop-down field, click **Investment List**.
4. Select the **Multiple Investments** list, which was created during the Working with Lists onboarding exercise guide.



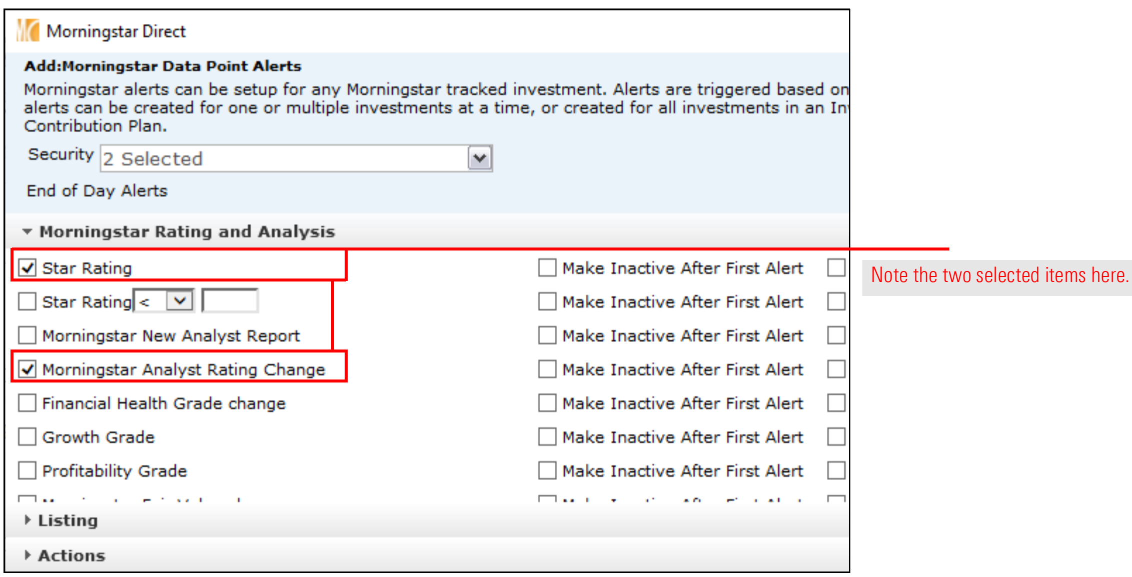
If this list is not available, select any other investment list containing funds.

5. Click the **Securities** section.

6. Search for **MWNIX** and select it.

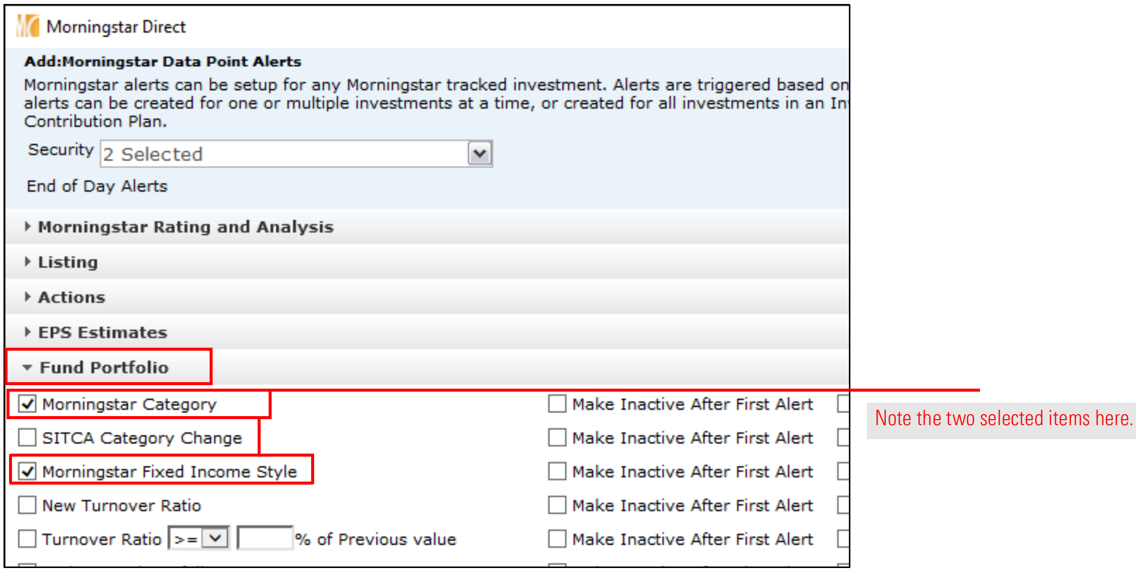


7. Click away from the Security field to close it.
8. The Morningstar Ratings and Analysis section should be expanded. Select the boxes for both **Star Rating** and **Morningstar Analyst Rating Change**.

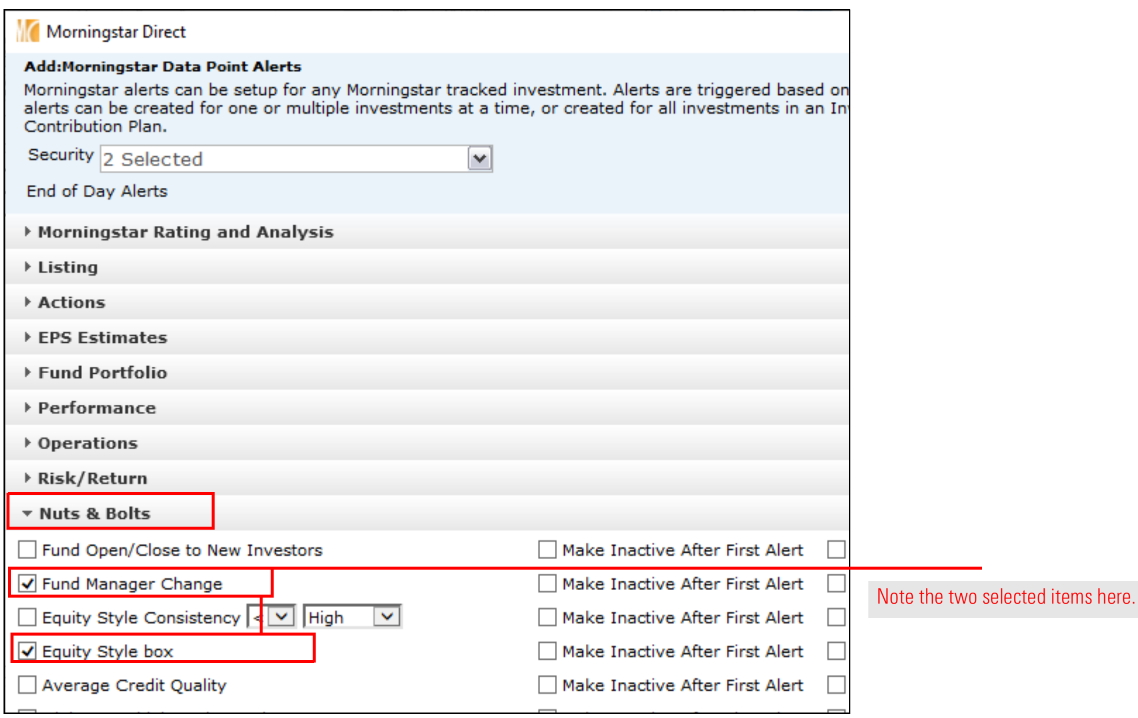


9. **Expand** the **Fund Portfolio** section.

10. Select the boxes for both **Morningstar Category** and **Morningstar Fixed Income Style**.



11. **Expand** the **Nuts & Bolts** section.
12. Select the boxes for both **Fund Manager Change** and **Equity Style box**.

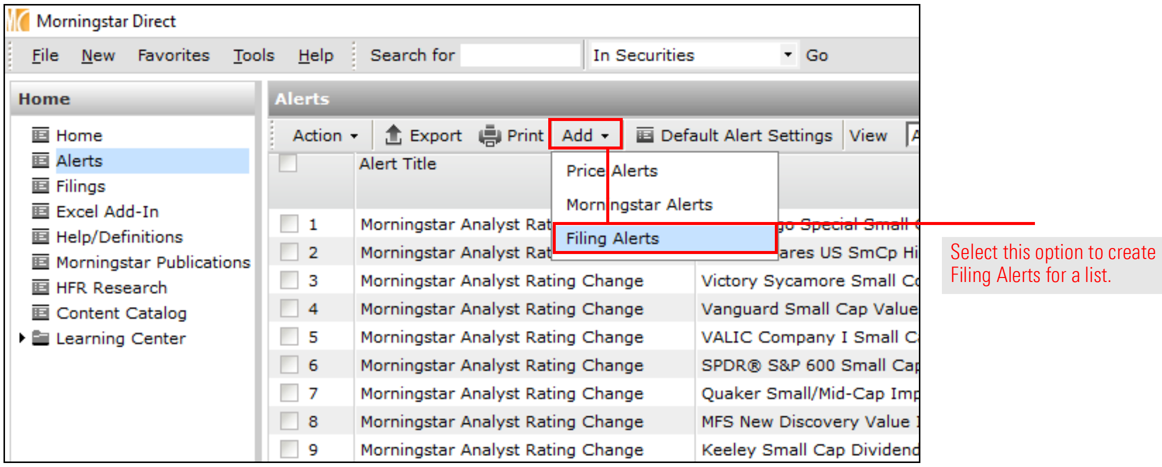


13. Click **Save**. The rules just added now show on the Alert Rules page.

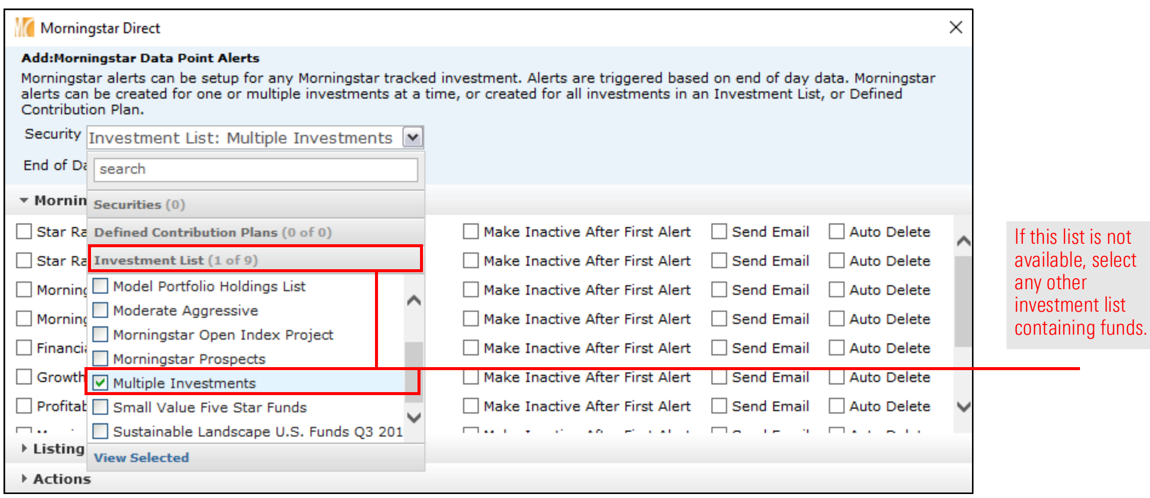
Exercise 4: Create a Filings Alert

Filing Alerts show users any new stock or fund government reports such as annual reports, prospectuses, and much more. This exercise shows users how to select an investment list (saved in the Workspace module) and how to set up multiple alerts for the selected securities. To create a Filing Alert, do the following:

1. The **Alerts** page in the Home module should be selected.
2. From the toolbar, click **Add** > **Filing Alerts**. The Add: Price Alerts dialog box opens.

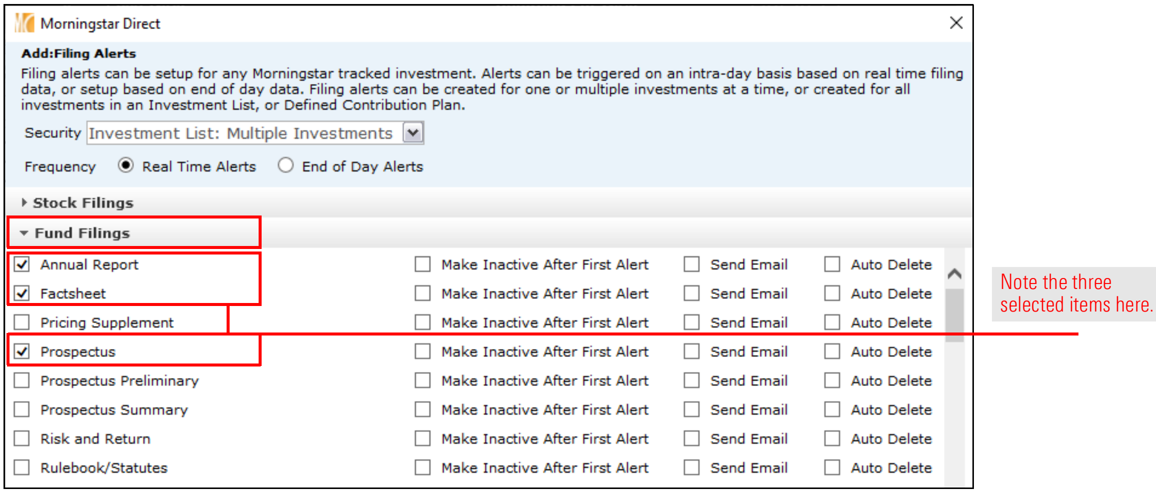


3. From the **Security** drop-down field, click **Investment List**.
4. Select the **Multiple Investments** list, which was created during the Working with Lists onboarding exercise guide.



5. Click away from the Security field to close it.
6. **Expand** the Fund Filings section.

7. Select the boxes for **Annual Report**, **Factsheet**, and **Prospectus**.

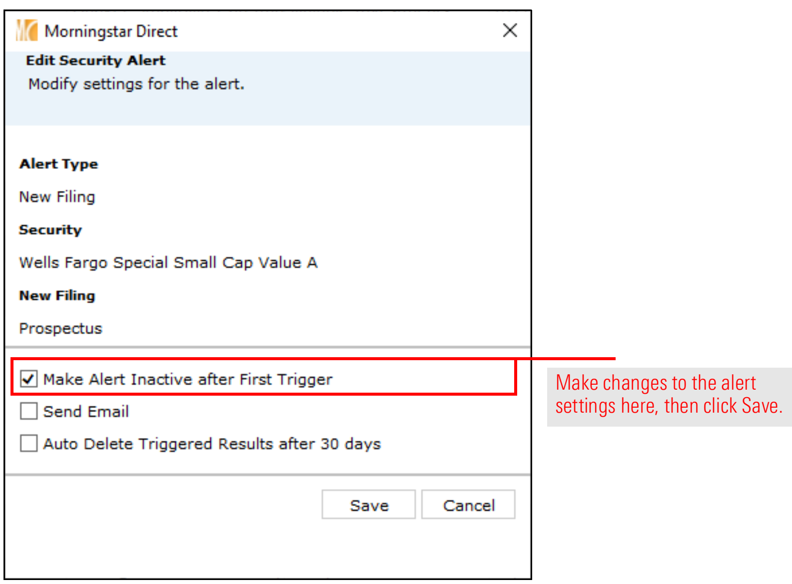


8. Click **Save**. The Filing Alerts just created are now available on the Alert Rules page.

Exercise 5: Edit an alert rule

Once an alert rule have been created, its notification settings can still be changed. To edit a rule, do the following:

1. On the **Alerts** page, ensure the **Alert Rules** view is selected.
2. **Double-click** one of the rules. The Edit Security Alert dialog box opens.
3. Select the box for **Make Alert Inactive after First Trigger**.

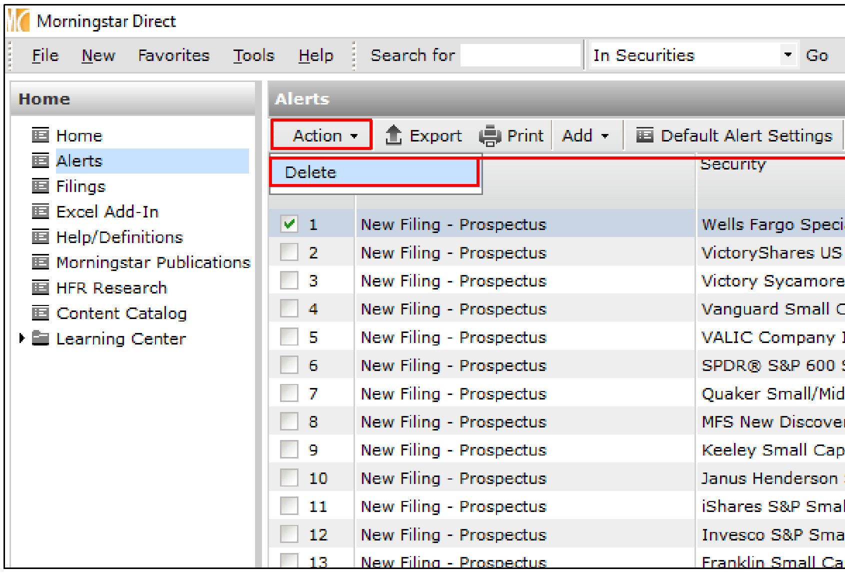


4. Click **Save**. The Edit Security Alert dialog box closes.

Exercise 6: Delete an alert rule

To delete a rule, do the following:

1. On the **Alerts** page, ensure the **Alert Rules** view is selected.
2. Select the **checkbox** to the left of the rule to be deleted.
3. From the toolbar, select **Action** > **Delete**.



Use the Action menu to delete selected alert rules.

4. When the confirmation message opens, click **OK**. The rule is deleted.