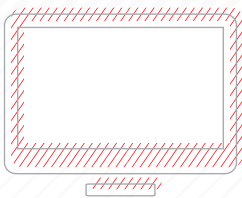
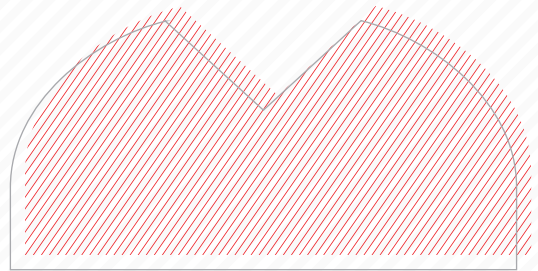
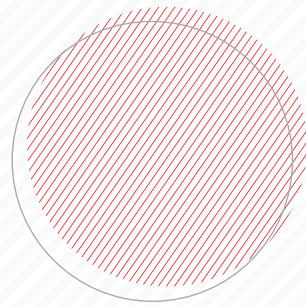
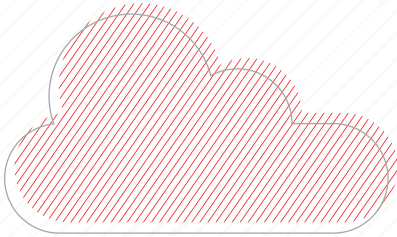
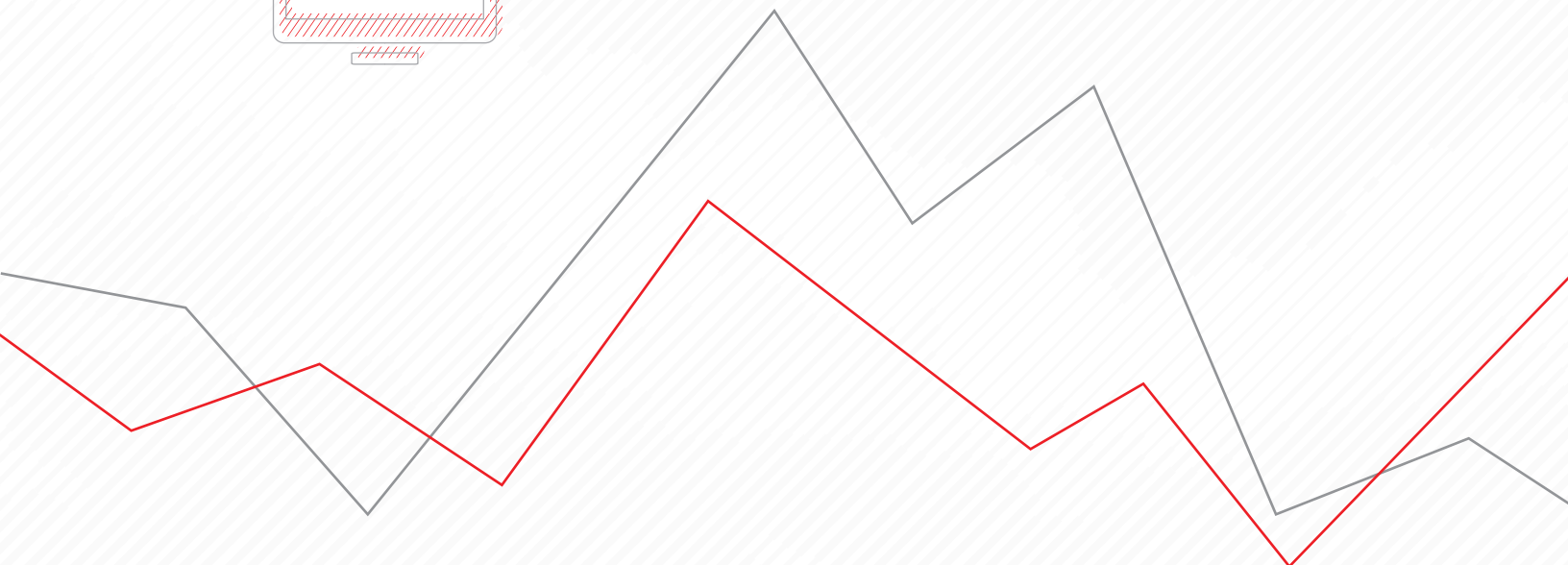


Discovering Actionable Investment Ideas in Research Portal

Exercise Guide



MORNINGSTAR Direct



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Discovering Actionable Investment Ideas in Research Portal

This workbook shows you how to take advantage of Research Portal for Morningstar DirectSM. Research Portal contains links to content from the Analyst Research team at Morningstar, including analysis of managed investments, equities, fixed income, macroeconomic trends, and more.

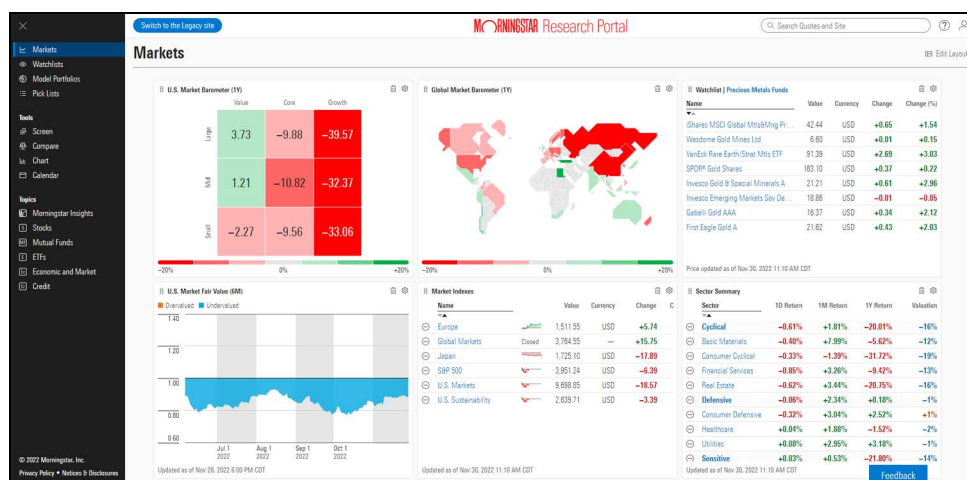
The exercises in this manual can guide you as you explore the functionality available in Research Portal. The following topics and exercises are covered here:

- ▶ [Navigating through Research Portal \(page 5\)](#)
- ▶ [Working with the Topic Pages and Watchlists \(page 8\)](#)
- ▶ [Investigating Investment Ideas \(page 23\)](#)
- ▶ [Utilizing Additional Tools \(page 31\)](#)

Overview

Research Portal is a web-based companion application designed to help you easily identify, communicate, monitor, and select investments based on the renowned independent research from Morningstar. Its interactive interface ensures users are equipped with the tools they need to make it easier for quick searches and access to Morningstar Research in an easy-to-discover process. Research Portal opens in a separate browser window, meaning users can simultaneously conduct research while also working side-by-side in Morningstar Direct.

What is Research Portal?



Built with speed, transparency, and independence in mind, Research Portal delivers unparalleled coverage to enable users to take the following actions:

- ▶ identify and select investments meeting criteria they define
- ▶ monitor investment performance in watchlists, and
- ▶ inform what you communicate to clients.

Navigating through Research Portal

Research Portal is designed to be easy to navigate. A variety of resources are available to users to assist in making the most of its features. This section shows you how to access Research Portal from Morningstar Direct, and describes the layout of the interface with the following exercises:

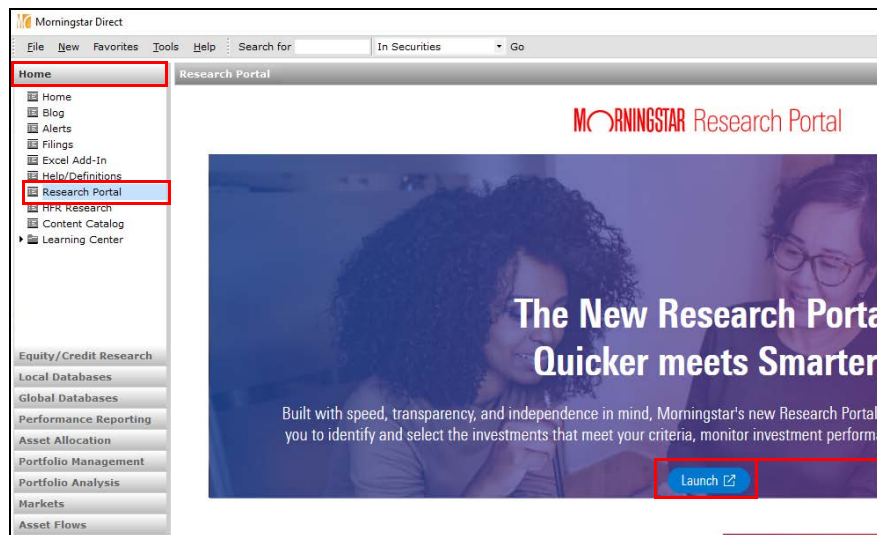
- ▶ [Exercise 1: Access Research Portal on page 5](#)
- ▶ [Exercise 2: Explore the Research Portal on page 6](#), and
- ▶ [Exercise 3: Compare workflows in the new vs legacy Research Portal on page 7](#).

Overview

Research Portal is found under the Home module in Morningstar Direct. From there, users can see both the legacy and new versions of the platform. To access Research Portal, do the following:

Exercise 1: Access Research Portal

1. From the Home module in Morningstar Direct, select the **Research Portal** page.
2. Review the types of content you can investigate on Research Portal landing page, then click **Launch web version**. Research Portal opens as a web page in a new window.



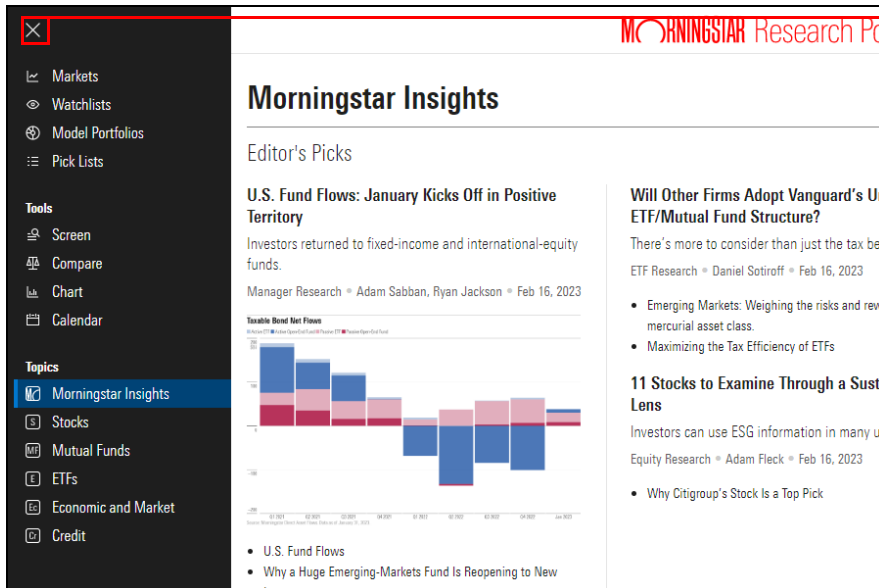
Click this button from the Research Portal page under the Home module to see the Research Portal.

Having Research Portal open in a separate window allows you to complete workflows in Morningstar Direct while investigating the markets and investment ideas side-by-side in Research Portal.

When the Research Portal opens from Morningstar Direct, you are brought to the Morningstar Insights page by default. The Research Portal menu (in the left-hand navigation pane) allows users to select any other page; several of these will be explored in the following exercises. Note, too, the header at the top of the page. From here, users can search for securities and content, find Help content, and more. To practice exploring the Research Portal, do the following:

Exercise 2: Explore the Research Portal

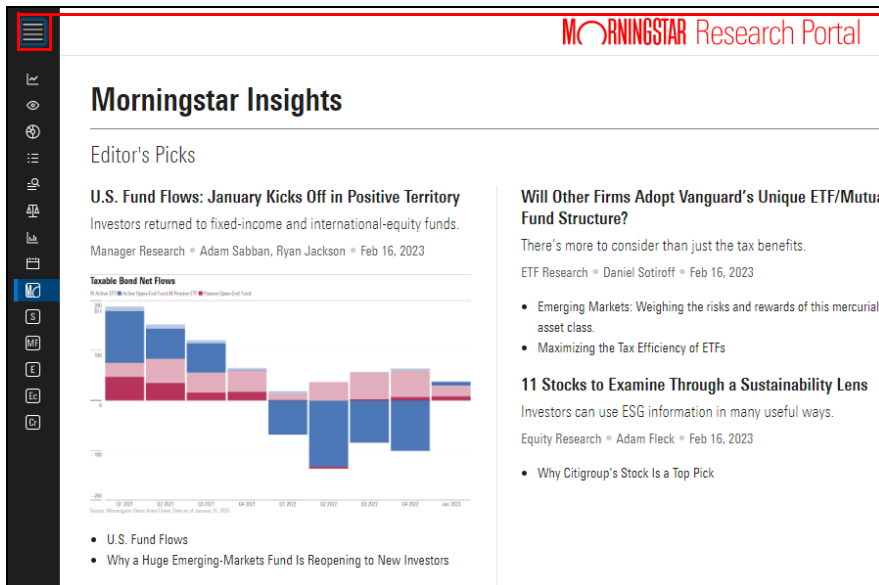
1. Click the **X** to collapse the Research Portal menu.



The screenshot shows the Morningstar Research Portal interface. The left-hand navigation pane is collapsed, and the 'X' icon at the top is highlighted with a red box. The main content area displays 'Morningstar Insights' with 'Editor's Picks' articles, including 'U.S. Fund Flows: January Kicks Off in Positive Territory' and 'Will Other Firms Adopt Vanguard's Unique ETF/Mutual Fund Structure?'. A chart titled 'Taxable Bond Net Flows' is also visible.

Click this icon to collapse the left-hand navigation pane.

2. To re-expand the Research Portal menu, click the **icon** at the top of the pane.



The screenshot shows the Morningstar Research Portal interface with the left-hand navigation pane expanded. The 'hamburger' icon at the top of the pane is highlighted with a red box. The main content area displays 'Morningstar Insights' with 'Editor's Picks' articles, including 'U.S. Fund Flows: January Kicks Off in Positive Territory' and 'Will Other Firms Adopt Vanguard's Unique ETF/Mutual Fund Structure?'. A chart titled 'Taxable Bond Net Flows' is also visible.

Click this icon to expand the left-hand navigation pane.

3. Click through several of the pages to see the types of information available on each one.

The new Research Portal provides familiar workflows as well as new functionality from the legacy Research Portal. To understand how legacy workflows can be completed in the new Research Portal, review the following table:

Exercise 3: Compare workflows in the new vs legacy Research Portal

On this legacy page...	You would...	In the new Research Portal, you can...
Featured	Review content curated daily by a Morningstar editor, such as Editor's Picks	Navigate to the Morningstar Insights page to review Editor's picks. Find additional items in the related pages as outlined in this table.
Latest	Find articles and reports from the Morningstar Research team	Find the latest analyst reports across the top of security-related Topics pages. Additionally, each subsection is arranged with their most recent content at the top.
Publications	Find content from Morningstar based on your interests	Find this content through subsections in the Topics pages (such as Fund Spy on the Mutual Funds Topics page). To find a specific publication (such as the US Active/Passive Barometer), use the Search bar.
Topics	Find content related to a topic shortcut	Use the Search bar to find related content. You may also be able to find articles through certain subsections in the Topics pages.
Videos	Watch videos about investing methodologies and securities	Navigate to the Videos section on one of the security-based Topics pages. To find a specific video, use the Search bar.
Alerts	Set up and receive notifications for specific securities or topics	Stay tuned for updates to this feature! This functionality is coming soon.
Bookmarks	Find articles or videos you saved	Stay tuned for updates to this feature! This functionality is coming soon.
Following	Access topics or authors that you follow	Stay tuned for updates to this feature! This functionality is coming soon.
Lists	Analyze a list of securities in the Workspace module that was saved from an article or video in Research Portal	Create a Watchlist to track and analyze selected investments or indexes. Watchlists in Research Portal and lists in the Workspace module of Morningstar Direct are synchronized to one another. See Exercise 6: Build a watchlist on page 10 and Exercise 7: Search for Equity Precious Metals funds on page 13 for more information.

Working with the Topic Pages and Watchlists

The Topics pages in Research Portal allows users to explore the latest research on stocks, mutual funds, and ETFs. Here you can find investment ideas with picks from our analysts, search sustainability ratings, read industry reports, watch analyst videos, and more. Some topics are arranged by security types or insights, as well as outlook on markets or economic research.

Users can find investment ideas with picks from Morningstar analysts, read industry reports, watch Morningstar analyst videos, and more. You can click either a specific article, or use the More button next to a collection to see additional content included in that collection. Securities mentioned in articles and videos can be saved to a watchlist, and you can bring in lists from Morningstar Direct, too.

This section offers the following exercises to help you practice these skills:

- ▶ [Exercise 4: Explore the ETFs Topics page on page 8](#)
- ▶ [Exercise 5: Find a specific article on page 9](#)
- ▶ [Exercise 6: Build a watchlist on page 10](#)
- ▶ [Exercise 7: Search for Equity Precious Metals funds on page 13](#)
- ▶ [Exercise 8: Add the search results to a watchlist on page 15](#)
- ▶ [Exercise 9: Change the data set and sort order for a watchlist on page 17](#), and
- ▶ [Exercise 10: Import a list from Morningstar Direct on page 18](#).

Overview

To begin your research, you can explore a variety of content from the Topics pages. To find articles related to ETFs, do the following:

Exercise 4: Explore the ETFs Topics page

1. From the Research Portal menu, select **ETFs**.
2. Across the top of the page, click **More** to review content such as Recent Analyst Ratings, Recent Sustainability Ratings, and Latest Analyst Reports. Scroll through the available investment ideas to find pre-created screens from Morningstar analysts.

The screenshot shows the Morningstar Research Portal interface. On the left, a sidebar menu lists various topics, with 'ETFs' highlighted. The main content area is titled 'ETFs' and features three columns of content. Each column has a 'More' button highlighted with a red box. A red line points from the 'More' button in the 'Latest Analyst Reports' column to a text box on the right.

Recent Analyst Ratings

Name	Exchange	Rating
Vanguard FT...	XTSE	Gold
iShares Core...	XTSE	Gold
iShares Core...	XTSE	Gold
Vanguard A...	XASX	Gold
Perpetual ES...	XASX	Silver
Vanguard A...	XASX	Gold
Vanguard Ex...	ARCX	Gold
Vanguard Ex...	XMEX	Gold
BetaShares...	XASX	Bronze
iShares € Ag...	XETR	Silver

Recent Sustainability Ratings

Name	Exchange	Rating
American...	ARCX	Gold
BMO MSCI...	XTSE	Gold
BetaShare...	XASX	Gold
Deka EURO...	XETR	Gold
iShares S&P...	BATS	Gold
KODEX US...	XKRX	Gold
Listed Inde...	XTKS	Gold
Materials...	ARCX	Gold
Nikko Exch...	XTKS	Gold
Ossiam US...	XETR	Gold

Latest Analyst Reports

- The alpha is in the details. Dimensional International Cr Eq Mkt ETF - Zachary Evans - Nov 29, 2022
- A cheap snapshot of the global real estate market. SPDR® Dow Jones Global Real Estate ETF - Ryan Jackson - Nov 28, 2022
- International developed-markets exposure for a low fee. Schwab International Equity ETF - Zachary Evans - Nov 23, 2022
- A cheap and diversified foreign stock fund. SPDR® Portfolio Developed Wld ex-US ETF - Zachary Evans - Nov 23, 2022
- A sensible index fund limited by its foreign mandate. SPDR® Dow Jones International RelEst ETF - Ryan Jackson - Nov 23, 2022

Select this page, then click **More** to see what other content is available.

3. To return to the ETFs page, from the Research Portal menu, select **ETFs**.

The universal toolbar in Research Portal offers a Search function. The results are grouped by All results, U.S. Securities, Global Securities, and Articles & Videos. To find a specific article, do the following:

Exercise 5: Find a specific article

1. In Research Portal, click in the **Search** field at the upper-right corner of the window.
2. Type **Equity Precious Metals**, then click **<ENTER>** to search.

Switch to the Legacy site

MORNINGSTAR Research Portal

Search: Equity Precious Metals

See All Results

ARTICLES & VIDEOS >

- Gabelli Gold**
Eric Schultz Jun 30, 2022
- Tocqueville Gold Equity**
Tony Thomas Jan 24, 2022
- Franklin Gold**
Eric Schultz Aug 25, 2022

ETFs

Recent Analyst Ratings

Recent Sustainability Ratings

Tools: Screen, Compare, Chart, Calendar

Topics: Morningstar Insights, Stocks, Mutual Funds, **ETFs**, Economic and Market

3. Once the results load, click **More Results** (to the right of Articles & Videos) to see all content.

Switch to the Legacy site

MORNINGSTAR Research Portal

Search Quotes and Site

Equity Precious Metals

All U.S. Securities Global Securities Articles & Videos

U.S. Securities [More Results >](#)

Global Securities [More Results >](#)

Articles & Videos [More Results >](#)

Gabelli Gold
Eric Schultz • Jun 30, 2022

Tocqueville Gold Equity
Tony Thomas • Jan 24, 2022

Tools: Screen, Compare, Chart, Calendar

Topics: Morningstar Insights, Stocks, Mutual Funds, **ETFs**, Economic and Market, Credit

4. Click to open the **Equity Precious-Metals Funds Shine in a Dark February** article. Keep this article open to use in the next exercise.

Switch to the Legacy site

MORNINGSTAR Research Portal

Search Quotes and Site

Equity Precious Metals

All U.S. Securities Global Securities **Articles & Videos**

Equity Precious-Metals Funds Shine in a Dark February

... Like January, February was a rough month for most Morningstar Categories. Only 13 of the 108 fund categories were in the black. **Equity Precious-Metals Funds** Soar Categories linked to commodities were...

Benjamin Slupecki • Mar 10, 2022

PIMCO Sales Move Is Business--Not Investor--Driven
Morningstar Fund Analysts • Sep 8, 2011

Tools: Screen, Compare, Chart, Calendar

Topics: Morningstar Insights, Stocks, **Mutual Funds**

The funds mentioned in the article can easily be added to a watchlist. A watchlist is simply a collection of securities chosen by a user. Creating a watchlist requires two steps. First, the watchlist itself needs to be created and named. Think of this as the container for what you will put into it. Next, each specific mentioned security must be manually added to the watchlist. This allows you to curate exactly which items you want in the watchlist, rather than simply including all items by default.

Exercise 6: Build a watchlist

To create a watchlist, do the following:

1. In Research Portal, read the **Equity Precious-Metals Funds Shine in a Dark February** article.
2. Under the Mentioned section, next to the first mentioned fund, click **Add To > New List**.

Switch to the Legacy site | **MORNINGSTAR** Research Portal | Search Quotes and Site

FUND TIMES

Equity Precious-Metals Funds Shine in a Dark February

Few Morningstar Categories came out ahead in a volatile month.

Benjamin Slupecki
Mar 10, 2022
United States

Mentioned: SPDR® Gold Shares (GLD), Wesdome Gold Mines Ltd (WDOFF), Gabelli Gold Fund (GAB)

Watchlist

Like January, only 13 of the equity precious-metals funds were in the black.

Equity Precious-Metals Funds

Categories: Equity Precious-Metals Funds

Compare

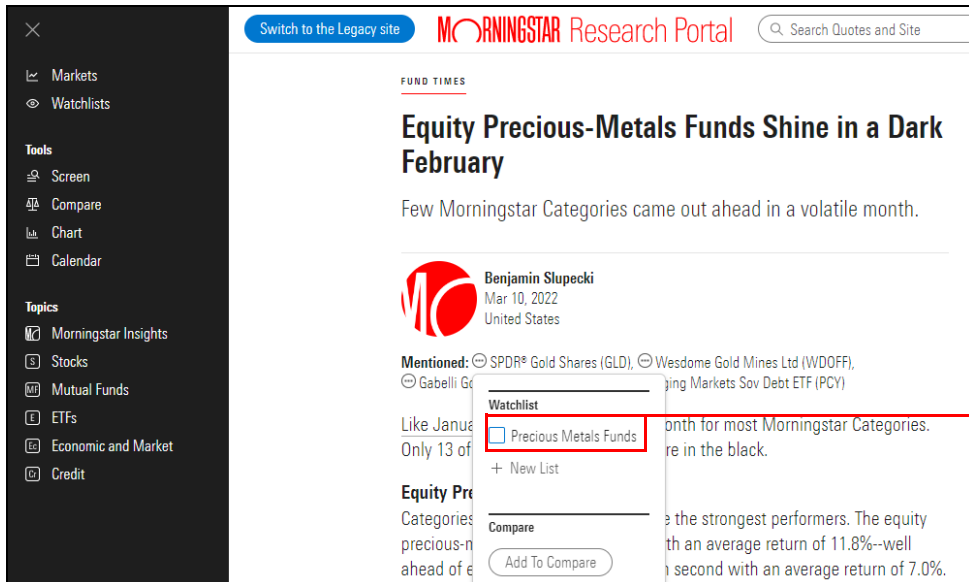
Add To Compare

+ New List

Use the Add To icon to select New List.

3. Name the new list **Precious Metals Funds** then click **Create Watchlist** to save the new watchlist.

- Once the new watchlist is created, click the **checkbox** to add the first-mentioned security to your new watchlist.



Switch to the Legacy site

MORNINGSTAR Research Portal

Search Quotes and Site

FUND TIMES

Equity Precious-Metals Funds Shine in a Dark February

Few Morningstar Categories came out ahead in a volatile month.

Benjamin Slupecki
Mar 10, 2022
United States

Mentioned: SPDR® Gold Shares (GLD), Wesdome Gold Mines Ltd (WDOFF), Gabelli Gold AAA (GOLDX), Invesco DWA Global Gold (GSDY), iShares MSCI Emerging Markets Sov Debt ETF (PCY)

Like January, February was a rough month for most Morningstar Categories. Only 13 of the 108 fund categories were in the black.

Equity Precious-Metals Funds S...
Categories linked to commodities...
precious-metals category stood ou...
ahead of equity energy, which can...

Watchlist

☐ Precious Metals Funds

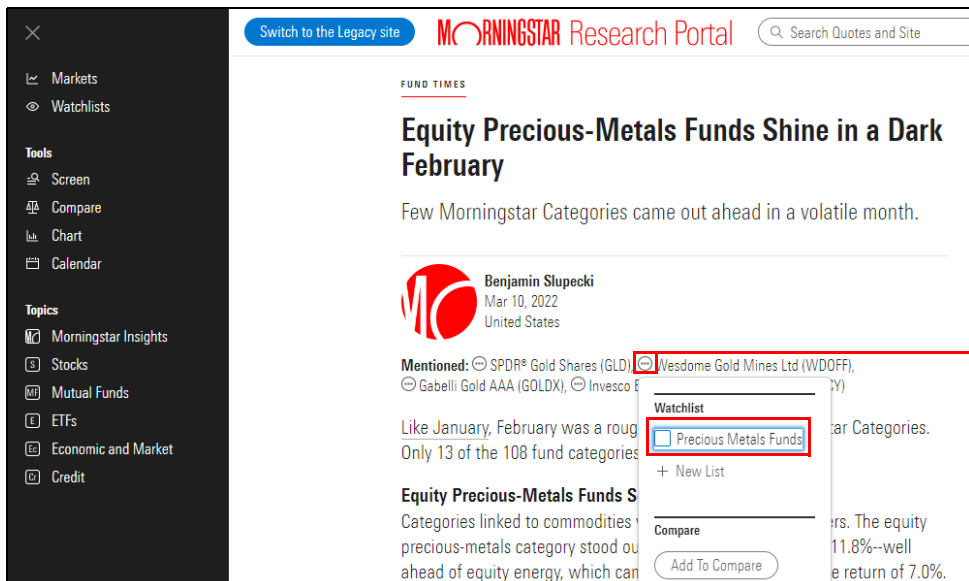
+ New List

Compare

Add To Compare

Checking the box automatically adds the item to the watchlist.

- For each remaining security mentioned in the article, click **Add To** to add each one to the new watchlist.



Switch to the Legacy site

MORNINGSTAR Research Portal

Search Quotes and Site

FUND TIMES

Equity Precious-Metals Funds Shine in a Dark February

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Like January, February was a rough month for most Morningstar Categories. Only 13 of the 108 fund categories were in the black.

Equity Precious-Metals Funds S...
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precious-metals category stood ou...
ahead of equity energy, which can...

Watchlist

☐ Precious Metals Funds

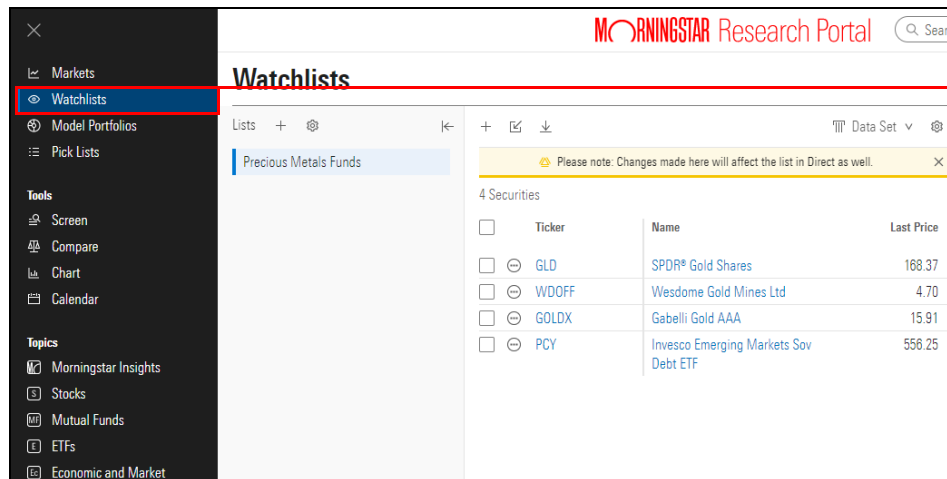
+ New List

Compare

Add To Compare

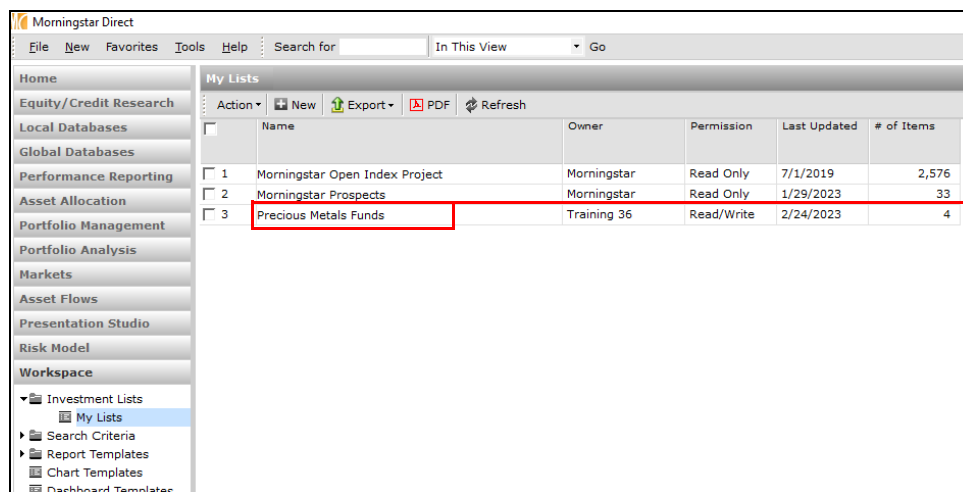
Use the Add To icon and check the box for every other mentioned fund in the article.

6. To see the full watchlist in Research Portal, select the **Watchlists** page from the Research Portal menu.



Select this page from the menu to see the watchlists you have created and the items on a watchlist.

7. Switch to **Morningstar Direct**.
8. Select the **Workspace** module, then be sure the **My Lists** page is selected. Note that the watchlist you created and saved is available here. Watchlists created in Research Portal automatically become available in the Workspace module.

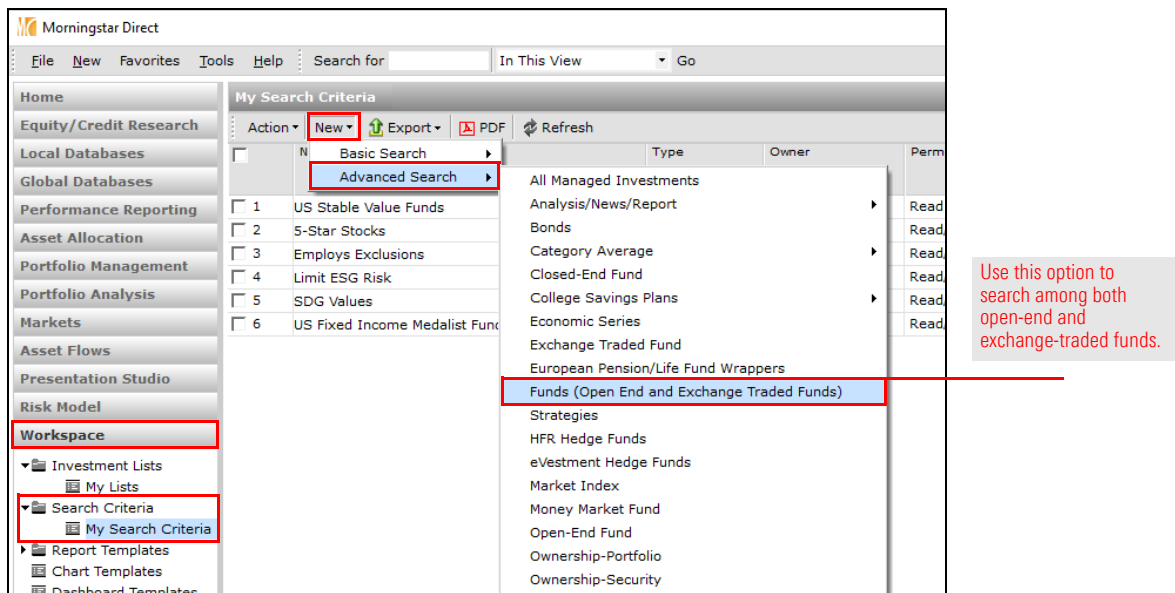


The same watchlist created in Research Portal is also available as a list in Morningstar Direct.

What other precious metals funds exist that could be added to the watchlist from Research Portal? This exercise shows you how to create an advanced search for these investments. To find additional funds to add to the watchlist, do the following:

Exercise 7: Search for Equity Precious Metals funds

1. If Morningstar Direct is not already selected, switch to it now and select the **Workspace** module.
2. Select **Search Criteria** > **My Search Criteria**.
3. From the toolbar, click **New** > **Advanced Search** > **Funds (Open End and Exchange Traded Funds)**.



4. Add the following criteria to find equity precious metal funds as mentioned in the article that share your domicile and have proven their strong performance:

Rel	Field Name	Operator	Value
---	Morningstar Category	=	U.S. > Equity Precious Metals
And	Oldest Share Class	=	Yes
And	Morningstar Rating Overall	>=	4

Be sure the criteria are entered just as they are shown here.

Morningstar Direct -- Funds (Open End and Exchange Traded Funds)

Open Insert Delete Clear All Export PDF Save As Feedback

	Rel	Field Name	Operator	Value
1	---	Morningstar Category	=	Equity Precious Metals
2	And	Oldest Share Class	=	Yes
3	And	Morningstar Rating Overall	>=	4
4				
5				
6				
7				
8				
9				
10				

View Field Name: ☒ By Category ☐ Alphabetically

Include: ☒ Only Surviving Investments ☐ User Defined Primary Class Only

Items Searched: 0 Items Found: -

Run Search

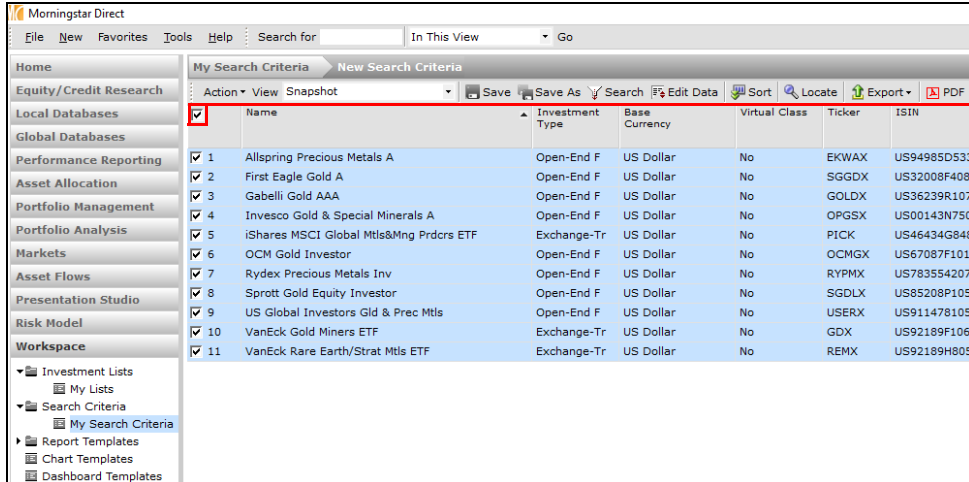
Help OK Cancel

5. To run the search, click **OK**. The next exercise addresses adding these items to the watchlist in Research Portal.

Investments from an advanced search can be added to a watchlist in Research Portal, simply by adding them to the corresponding list in Morningstar Direct. To practice this, do the following:

Exercise 8: Add the search results to a watchlist

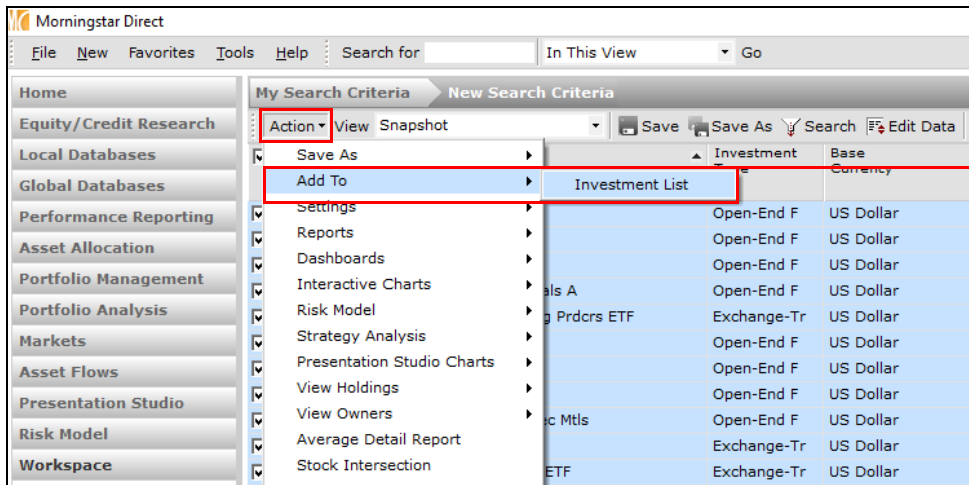
1. While looking at the search results in Morningstar Direct, click the **Select All** box above the grid view.



The screenshot shows the Morningstar Direct interface. On the left is a navigation pane with categories like Home, Equity/Credit Research, Local Databases, Global Databases, Performance Reporting, Asset Allocation, Portfolio Management, Portfolio Analysis, Markets, Asset Flows, Presentation Studio, Risk Model, and Workspace. The main area displays a table of search results under the 'My Search Criteria' tab. The table has columns: Name, Investment Type, Base Currency, Virtual Class, Ticker, and ISIN. There are 11 rows of results, all of which are selected, indicated by a red checkmark in the 'Action' column header. A red box highlights the 'Action' column header. A red arrow points from the 'Action' column header to a text box on the right that says 'Start by selecting all investments from the search.'

Action	Name	Investment Type	Base Currency	Virtual Class	Ticker	ISIN
<input checked="" type="checkbox"/>	1 Allspring Precious Metals A	Open-End F	US Dollar	No	EKWAX	US94985D533
<input checked="" type="checkbox"/>	2 First Eagle Gold A	Open-End F	US Dollar	No	SGGD	US32008F408
<input checked="" type="checkbox"/>	3 Gabelli Gold AAA	Open-End F	US Dollar	No	GOLDX	US36239R107
<input checked="" type="checkbox"/>	4 Invesco Gold & Special Minerals A	Open-End F	US Dollar	No	OPGSX	US00143N750
<input checked="" type="checkbox"/>	5 iShares MSCI Global Mtls&Mng Prdcrs ETF	Exchange-Tr	US Dollar	No	PICK	US46434G848
<input checked="" type="checkbox"/>	6 OCM Gold Investor	Open-End F	US Dollar	No	OCMGX	US67087F101
<input checked="" type="checkbox"/>	7 Rydex Precious Metals Inv	Open-End F	US Dollar	No	RYPMX	US783554207
<input checked="" type="checkbox"/>	8 Sprott Gold Equity Investor	Open-End F	US Dollar	No	SGDLX	US85208P105
<input checked="" type="checkbox"/>	9 US Global Investors Gld & Prec Mtls	Open-End F	US Dollar	No	USERX	US911478105
<input checked="" type="checkbox"/>	10 VanEck Gold Miners ETF	Exchange-Tr	US Dollar	No	GDX	US92189F106
<input checked="" type="checkbox"/>	11 VanEck Rare Earth/Strat Mtls ETF	Exchange-Tr	US Dollar	No	REMX	US92189H805

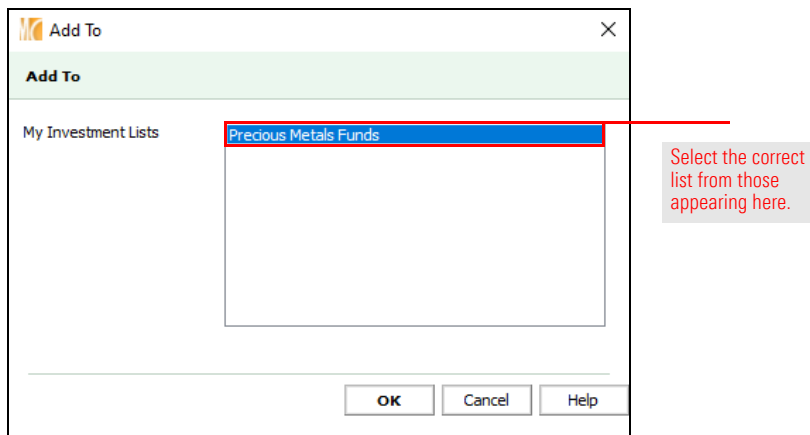
2. From the **Action** menu, select **Add to > Investment List**. The Add To dialog box opens.



The screenshot shows the Morningstar Direct interface with the 'Action' menu open. The 'Add To' option is highlighted in blue. A red box highlights the 'Add To' option. A red arrow points from the 'Add To' option to a text box on the right that says 'Select this option to add the funds to an existing list.'

Action	Name	Investment Type	Base Currency
Save As			
Add To			
Settings			
Reports			
Dashboards			
Interactive Charts			
Risk Model			
Strategy Analysis			
Presentation Studio Charts			
View Holdings			
View Owners			
Average Detail Report			
Stock Intersection			
X-Ray			

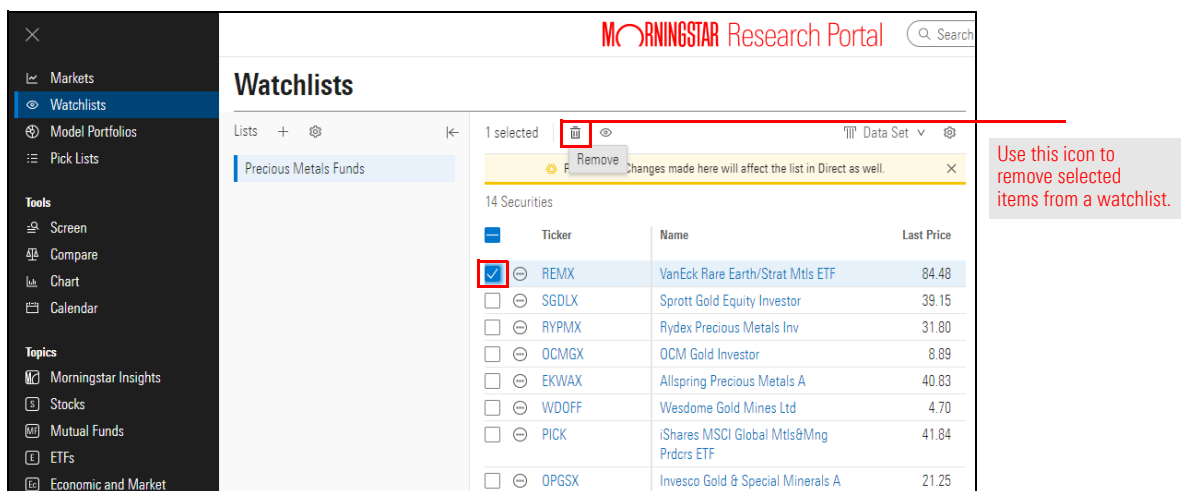
3. Select **Precious Metals Funds**, then click **OK**.



4. To see the updated list, select the **My Lists** page.

Note: When prompted to save your changes, click **No**. This refers to saving the advanced search, which is not needed.

5. **Double-click** the **Precious Metals Funds** list to open it. Note the new items now available from the list.
6. Return to the **Research Portal** window. If needed, select the **Watchlists** page from the Research Portal menu. Note that the new funds now appear here automatically.
7. Check the **box** to the left of the first fund in the watchlist.
8. From the toolbar, click the **Remove** icon. The item is no longer part of the watchlist.



9. Switch back to **Morningstar Direct**. The Precious Metals Funds list should still be open. Note that the fund removed from the watchlist still appears here.

10. From the toolbar, click the **Refresh** icon. The fund removed from the watchlist also no longer appears here.

Morningstar Direct

File New Favorites Tools Help Search for In This View Go

Home

Equity/Credit Research

Local Databases

Global Databases

Performance Reporting

Asset Allocation

Portfolio Management

Portfolio Analysis

Markets

Asset Flows

Presentation Studio

Risk Model

Workspace

Investment Lists

My Lists

Search Criteria

My Search Criteria

Report Templates

Chart Templates

Dashboard Templates

My Lists Precious Metals Funds

Action View Snapshot

Save Add Edit Data Sort Locate Export PDF Refresh

	Name	Base Currency	Ticker	ISIN	Global Broad Category Group	Global Category	Refresh
1	SPDR® Gold Shares	US Dollar	GLD	US78463V1070	Commodities	Commodities Specified	
2	Wesdome Gold Mines Ltd	US Dollar	WDOFF	CA95083R1001	Equity	Precious Metals Sector	
3	Gabelli Gold AAA	US Dollar	GOLDX	US36239R1077	Equity	Precious Metals Sector	
4	Invesco Emerging Markets Sov Debt ETF	Mexican Peso	PCY	US46138E7849	Fixed Income	Precious Metals Sector	
5	Allspring Precious Metals A	US Dollar	EKWAX	US94985D5335	Equity	Precious Metals Sector	
6	First Eagle Gold A	US Dollar	SGGD	US32008F4081	Equity	Precious Metals Sector	
7	Invesco Gold & Special Minerals A	US Dollar	OPGSX	US00143N7509	Equity	Precious Metals Sector	
8	iShares MSCI Global Mtls&Mng Prdcs ETF	US Dollar	PICK	US46434G8481	Equity	Precious Metals Sector	
9	OCM Gold Investor	US Dollar	OCMGX	US67087F1012	Equity	Precious Metals Sector	
10	Rydex Precious Metals Inv	US Dollar	RYPMX	US7835542074	Equity	Precious Metals Sector	
11	Sprott Gold Equity Investor	US Dollar	SGDLX	US85208P1057	Equity	Precious Metals Sector	
12	US Global Investors Gld & Prec Mtls	US Dollar	USERX	US9114781050	Equity	Precious Metals Sector	
13	VanEck Gold Miners ETF	US Dollar	GDX	US92189F1066	Equity	Precious Metals Sector	
14	VanEck Rare Earth/Strat Mtls ETF	US Dollar	REMX	US92189H8051	Equity	Precious Metals Sector	

Click this icon to update the members of the list.

Once items are selected for a watchlist, you can change the data points being displayed and select a different sort order for the data. To practice making these changes, take the following steps:

Exercise 9: Change the data set and sort order for a watchlist

1. Be sure a watchlist is selected. From the toolbar above the watchlist, click **Data Set**, then select the **Fund Ratings** data set to review different data points for these items.

Note: You can also create custom column data sets to be used across all your watchlists.

Switch to the Legacy site

MORNINGSTAR Research Portal

Search Quotes and Site

Watchlists

Lists

Precious Metals Funds

+ Create List

8 Securities

	Ticker	Name			
	GLD	SPDR® Gold Shares			
	WDOFF	Wesdome Gold Mines Ltd			
	GOLDX	Gabelli Gold AAA			
	PCY	Invesco Emerging Markets Sov Debt ETF	18.87	USD	
	SGGD	First Eagle Gold A	21.62	USD	
	OPGSX	Invesco Gold & Special Minerals A	21.21	USD	
	PICK	iShares MSCI Global Mtls&Mng Prdcs ETF	41.79	USD	
	REMX	VanEck Rare Earth/Strat Mtls ETF	88.70	USD	

Performance
Equity Summary
Fund Ratings
My Data Set
+ Create Column Set

Use this menu to change the data points shown in the grid.

- To sort the watchlist of securities by ETF vs open-end fund, click the **Settings** icon to select **Investment Type**.

Use the Settings icon to sort on a particular column.

Lists	8 Securities	Anal (Over)	Stars
Precious Metals Funds			
+ Create List			
	<input type="checkbox"/> Ticker	Name	
	<input type="checkbox"/> GLD	SPDR® Gold Shares	
	<input type="checkbox"/> WDOFF	Wesdome Gold Mines Ltd	
	<input type="checkbox"/> GOLDX	Gabelli Gold AAA	Neutral ★★★★★
	<input type="checkbox"/> PCY	Invesco Emerging Markets Sov Debt ETF	Negative ★★
	<input type="checkbox"/> SGGDX	First Eagle Gold A	Silver ★★★★★
	<input type="checkbox"/> OPGSX	Invesco Gold & Special Minerals A	Neutral ★★★★★
	<input type="checkbox"/> PICK	iShares MSCI Global Mts&Mng	Silver ★★★★★

In [Exercise 8: Add the search results to a watchlist on page 15](#), you saw how to add investments from a list (via an advanced search) in the Workspace module of Morningstar Direct to a watchlist in Research Portal. When that happened, the new investments on the list in Morningstar Direct automatically appeared in the watchlist in Research Portal. What happens, though, in the opposite case? How can a list originating in the Workspace module of Morningstar Direct appear as a watchlist in Research Portal? This exercise shows you how to take that action.

Exercise 10: Import a list from Morningstar Direct

Note, however, the following important caveats about bringing lists from Morningstar Direct into Research Portal:

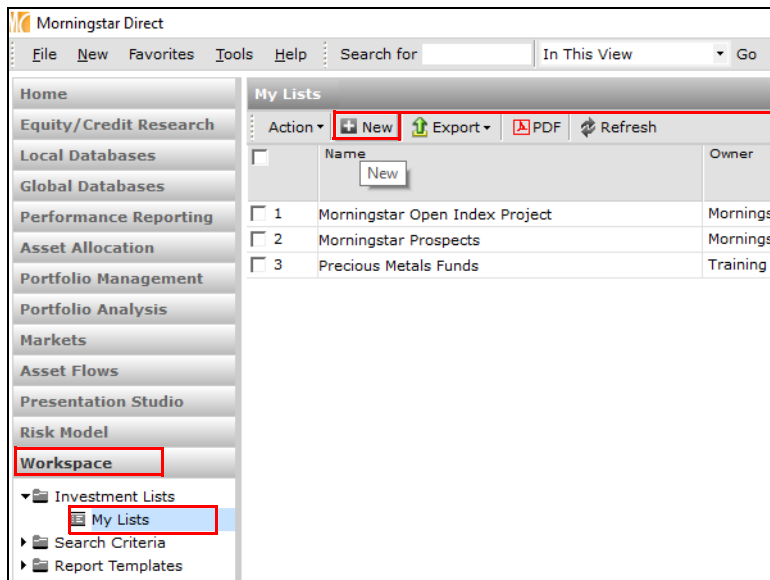
- ▶ Research Portal does not support as many investment types as Morningstar Direct. Therefore, if a list includes an investment type not supported by Research Portal, then data for that item in Research Portal will be dashed out and unavailable in the watchlist.
- ▶ Each watchlist in Research Portal can contain a maximum of 100 investments. If the list in Morningstar Direct contains more than 100 items, consider saving it to multiple lists in order for all items to appear in Research Portal watchlists.
- ▶ Research Portal users may create a total of 100 watchlists.
- ▶ If a list in the Workspace module in Morningstar Direct was shared from another user, they must grant you read-write access to the list for you to be able to bring it into Research Portal.
- ▶ Actions taken on lists and watchlists are bi-directional between Morningstar Direct and Research Portal. If a list or watchlist is deleted in one location, it will be deleted in the other, too.

To bring in a list from Morningstar Direct as a watchlist in Research Portal, do the following:

1. Switch to Morningstar Direct. Be sure the **My Lists** page under the Workspace module is selected.

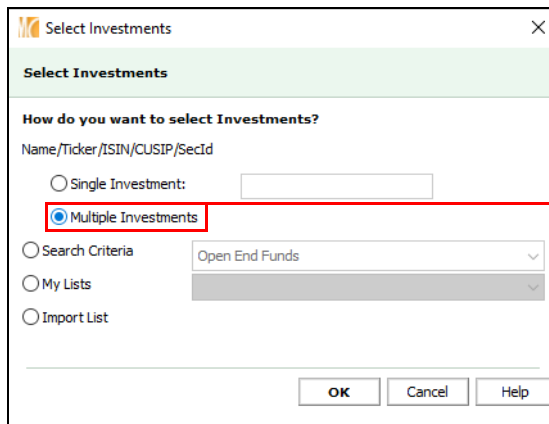
☞ Note: If you have an existing list you would like to bring into Research Portal, skip to step .

2. From the toolbar, click **New**. The Select Investments dialog box opens.



Use this icon to create a new list.

3. Select the option for **Multiple Investments**, then click **OK**. The Find Investments dialog box opens.



Be sure this option is selected.

4. From the **Universe** drop-down field, select **Stocks**.

Find Investments

Within: ☒ Universes ☐ My Lists ☐ My Searches

Find By: **Open End Funds** (dropdown)

Available Records: Total records: No record

Jump to record name:

Go

Add Add All

Select this universe.

5. Enter and select the following stocks:
- ▶ **Ecolab**
 - ▶ **Celanese Corp Class A**
 - ▶ **International Flavors and Fragrances Inc,** and
 - ▶ **Eastman Chemical Co.**

Find Investments

Within: ☒ Universes ☐ My Lists ☐ My Searches

Find By: **Stocks** (dropdown)

Find By: Name (dropdown) ☐ Begins with ☒ Contains

☒ Include Only Surviving Investments

Eastman

Go

Available Records: Total records: 19

Jump to record name:

Eastman Chemical Co (USD,XNYS,EMN,RepPerf) (highlighted)

Eastman Chemical Co (EUR,XBER,EAC)

Eastman Chemical Co (EUR,XDUS,EAC)

Eastman Chemical Co (EUR,XFRA,EAC)

Eastman Chemical Co (EUR,XSTU,EAC)

Add Add All

Selected Records: Total records: 4

Ecolab Inc (USD,XNYS,ECL,RepPerf)

Celanese Corp Class A (USD,XNYS,CE,RepPerf)

International Flavors & Fragrances Inc (USD,XNYS,IFF,RepPerf)

Eastman Chemical Co (USD,XNYS,EMN,RepPerf)

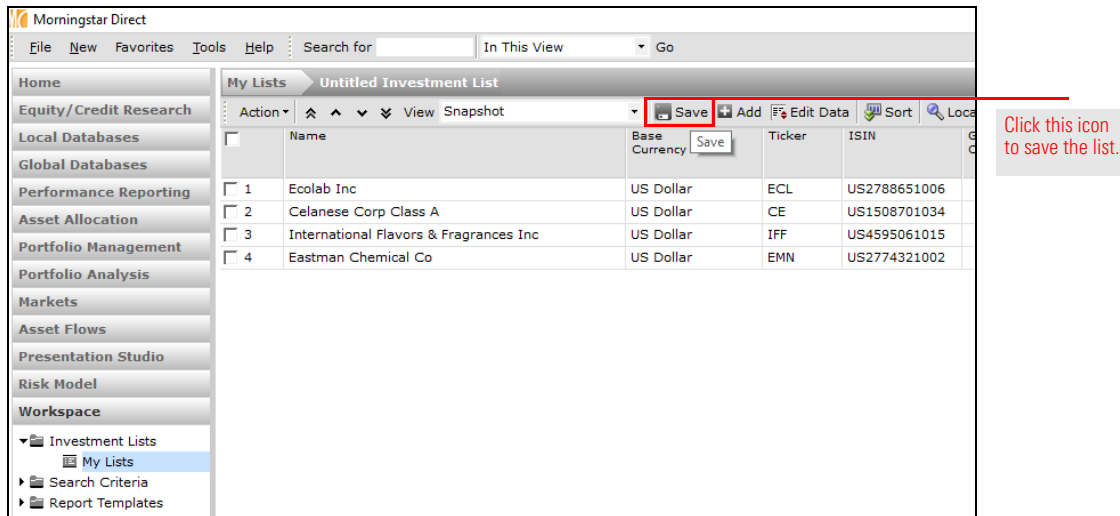
Remove Remove All

Help OK Cancel

As you search for items, you can either select one from a local exchange, or select the oldest version, as indicated by the "RepPerf" designation.

6. Click **OK** to close the Find Investments dialog box.

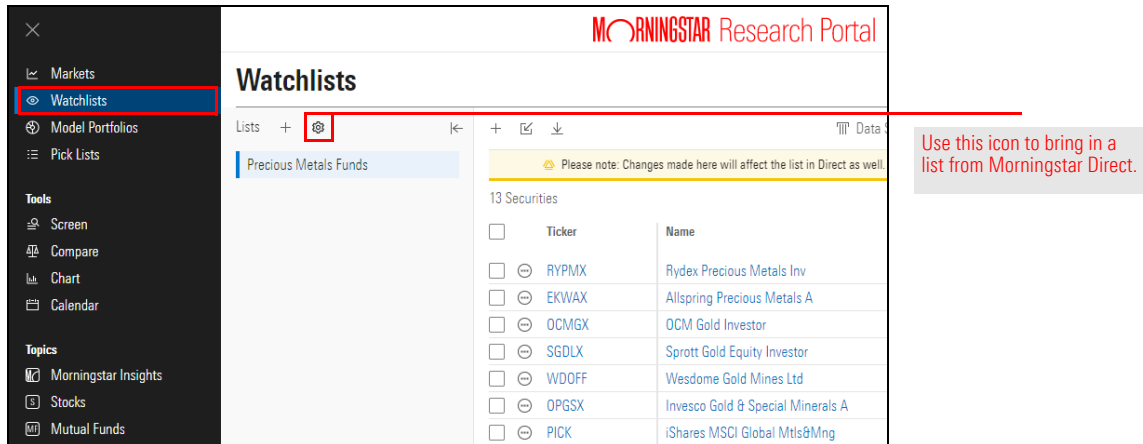
7. From the toolbar above the grid view, click **Save**.



Click this icon to save the list.

	Name	Base Currency	Ticker	ISIN
1	Ecolab Inc	US Dollar	ECL	US2788651006
2	Celanese Corp Class A	US Dollar	CE	US1508701034
3	International Flavors & Fragrances Inc	US Dollar	IFF	US4595061015
4	Eastman Chemical Co	US Dollar	EMN	US2774321002


8. Name the list **Specialty Chemicals Companies**, then click **OK**.
9. Switch to the **Research Portal** window.
10. If needed, select the **Watchlists** page. Note that the list from Workspace was not automatically added here. This is intentional, to ensure users have full control in deciding what appears here.
11. In the watchlist panel to the left of the watchlist content, click the **Manage Lists icon**. The Manage Lists dialog box opens.



Use this icon to bring in a list from Morningstar Direct.

MORNINGSTAR Research Portal

Watchlists

Lists +  Data

Precious Metals Funds

Please note: Changes made here will affect the list in Direct as well.

13 Securities

	Ticker	Name
<input type="checkbox"/>	RYPMX	Rydex Precious Metals Inv
<input type="checkbox"/>	EKWAX	Allspring Precious Metals A
<input type="checkbox"/>	OCMGX	OCM Gold Investor
<input type="checkbox"/>	SGDLX	Sprott Gold Equity Investor
<input type="checkbox"/>	WDOFF	Wesdome Gold Mines Ltd
<input type="checkbox"/>	OPGSX	Invesco Gold & Special Minerals A
<input type="checkbox"/>	PICK	iShares MSCI Global Mts&Mng

12. Check the **box** for Specialty Chemicals Companies, then click **Save**.

Manage Lists

Select the investment lists from Direct that you would like to use in Research Portal. Any updates you make to a list here will also be reflected in Direct. Please note: Research Portal supports lists that contain up to 100 stocks, open-end funds, ETFs, or closed-end funds.

Direct Investment Lists	Selected Lists
<input checked="" type="checkbox"/> Select All	Specialty Chemicals Companies
<input checked="" type="checkbox"/> Specialty Chemicals Companies	

Cancel Save

You can select more than one list at a time, if you like.

13. Click the name of the **Specialty Chemicals Companies watchlist** to show its members on the page. Remember that any changes made to the watchlist here will be reflected in Morningstar Direct when the list is refreshed. This includes items being added to or removed from the watchlist, renaming the watchlist, and deleting the watchlist.

MORNINGSTAR Research Portal

Watchlists

Lists + [icon] [icon] + [icon] [icon] [icon] Data Set [icon]

Precious Metals Funds

Specialty Chemicals Companies

4 Securities

	Ticker	Name	Last Price
<input type="checkbox"/>	IFF	International Flavors & Fragrances Inc	93.78
<input type="checkbox"/>	CE	Celanese Corp Class A	124.54
<input type="checkbox"/>	ECL	Ecolab Inc	163.40
<input type="checkbox"/>	EMN	Eastman Chemical Co	87.26

Selecting a watchlist shows its members in the main window.

Investigating Investment Ideas

Besides reading articles or watching videos from Morningstar, Research Portal also allows users to investigate their own ideas from scratch. You can build screens, explore the Investment Ideas section on each Topics page, and rearrange the content on a page to better manage the way you process the available data.

This section offers the following exercises to help you practice these skills:

- ▶ [Exercise 11: Save investments from an Investment Idea page to a watchlist on page 23](#)
- ▶ [Exercise 12: Build a screen on page 25](#), and
- ▶ [Exercise 13: Edit the layout of the Markets page on page 28](#).

The Investment Ideas section under each Topics page includes pre-created screens with selected criteria from Morningstar analysts. For each idea, additional criteria can be added to help screen results. To explore an investment idea, do the following:

1. From the Research Portal menu, select **ETFs**.
2. If needed, **scroll down** on the ETFs page to the Investment Ideas section, then click the **scroll right** icon to select the **Top-Performing Sector ETFs** item. This opens a pre-created screen on the Screen page.

Overview

Exercise 11: Save investments from an Investment Idea page to a watchlist

The screenshot displays the Morningstar Research Portal interface. The main content area is titled 'Investment Ideas' and is divided into four columns, each representing a different investment strategy or theme. The columns are: 'Core Medalist ETFs', 'High-Quality Core Equity Portfolios', 'High-Quality Medalist Bond ETFs', and 'Moats and'. Each column contains a list of ETFs with their names and ratings. A red box highlights a right-pointing arrow icon in the 'Moats and' column, with a callout box stating 'Click this icon to scroll right and see additional content.' The page also includes a sidebar with navigation options like Markets, Watchlists, Tools, and Topics, and a footer with copyright information and a search bar.

3. To sort the results by category, click the **Morningstar Category** column header.

Click a column's header to sort by that data point. Click it again to sort in the opposite order.

The screenshot shows the Morningstar Research Portal interface. On the left is a sidebar with navigation options like Markets, Watchlists, Tools, and Topics. The main area displays a list of 87 Securities (ETFs) under the filter 'Top-Performing Sector ETFs'. The columns include Ticker, Name, Analyst Rating, Morningstar Rating for Funds, Morningstar Sustainability Rating, Morningstar Category, and Size. The 'Morningstar Category' column header is highlighted with a red box, and a red arrow points to it from the instruction text above.

4. **Scroll down** until the Health category is seen, then **check the box** to the left of each fund in the Health Morningstar category.
5. From the toolbar, click **Add to Watchlist**, then select **+ New List**.

Click this icon to create a new watchlist.

The screenshot shows the Morningstar Research Portal interface. The list of 87 Securities is now filtered to show only Health category ETFs. The 'Add to Watchlist' icon (a plus sign in a circle) is highlighted with a red box, and a red arrow points to it from the instruction text above. A dropdown menu is open, showing 'Previous Metals Funds' and '+ New List'.

6. Name the new watchlist **Health Funds**, then click **Create Watchlist**.

7. Select the checkbox for the **Health Funds** watchlist. This adds the Health funds to that watchlist. Keep the screen open for the next exercise.

Select the correct watchlist; the items are added to it automatically.

Switch to the Legacy site

Screen

Filters Reset Apply 7 Selected

Investment Type
ETFs

Top-Performing Sector ETFs

Search Securities

Criteria

Operations

Ratings

Fees and Expenses

87 Securities

Precious Metals Funds

Health Funds

Ticker + New List

Ticker	ETF Name	Analyst Rating (Overall)
IYG	iShares US Financial Services ETF	Bronze
KCE	SPDR® S&P Capital Markets ETF	Silver
FHLG	Fidelity® MSCI Health Care ETF	Gold
IHI	iShares US Medical Devices ETF	Bronze
IHF	iShares US Healthcare Providers ETF	Silver
VHT	Vanguard Health Care ETF	Gold
XLV	Health Care Select Sector SPDR® ETF	Silver
RYH	Invesco S&P 500® Equal Wt Hlth Care ETF	Neutral

In addition to using the existing screens from the Investment Ideas sections, Research Portal users can also craft their own screens. For example, the screen seen when using the ETFs page showed top-performing ETFs, but what about other ETFs in the Health category that might not have had as strong of a performance, but are still projected to deliver Alpha relative to their category peers? To create an independent screen to find these top-rated ETFs, do the following:

Exercise 12: Build a screen

1. In the panel to the left of the grid for the pre-existing screen, click **X** to remove the Top Performing Sector ETFs filter. Note how the number of securities now reflects all available ETFs globally.

Switch to the Legacy site

Screen

Filters Reset Apply 87 Securities

Investment Type
ETFs

Top-Performing Sector ETFs X

Search Securities

Criteria

Operations

Click here to remove the default screen.

2. **Expand** the **Criteria** menu
3. From the **Morningstar Category** drop-down field, select **Health**.

☞ Note: To quickly jump to an option in a drop-down field, start typing its name.

Switch to the Legacy site

Screen

Filters Reset Apply

Investment Type
ETFs

24,614 Securities

Search Securities

Criteria

Asset Class

Morningstar Category

Greater China High Yield Bond

Greece Equity

HKD Bond

Health

High Yield Bond

Ticker	Name
LICNETFGSC	LIC MF Nifty 8-1
SETF10GILT	SBI Nifty 10 yr B
NETFLTGILT	Nippon India ET
ERCV	Evermore Retire
ERDO	Evermore Retire
ERDV	Evermore Retire
EREV	Evermore Retire

Expand a section to see the available criteria.

- Click anywhere to close the drop-down field. **Expand** the **Ratings** menu, then select **Gold**.
- At the top of the Filters panel, click **Apply** to run the screen.

Switch to the Legacy site

Screen

Filters Reset Apply

Search Securities

Criteria

Asset Class

Morningstar Category

Health

Strategic Beta Group

Net Assets

< 100 Mil

100 Mil – 500 Mil

500 Mil – 1 Bil

1 Bil – 25 Bil

25 Bil – 50 Bil

50 Bil – 100 Bil

> 100 Bil

Operations

Ratings

Morningstar Analyst Rating

Include Quantitative Ratings

Gold

Silver

Bronze

Neutral

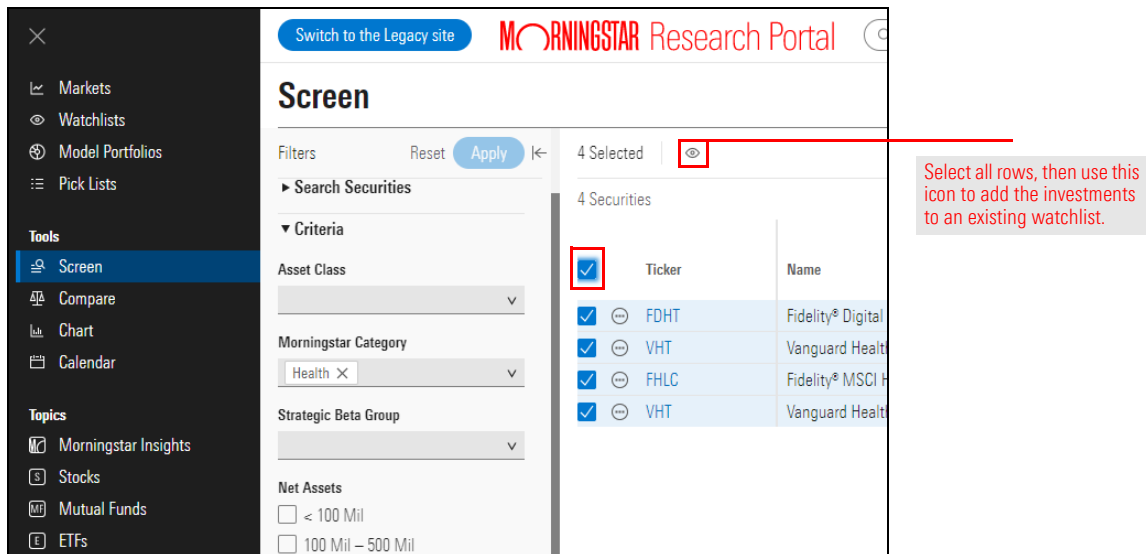
24,614 Securities

Ticker	Name
LICNETFGSC	LIC MF Nifty 8-1
SETF10GILT	SBI Nifty 10 yr B
NETFLTGILT	Nippon India ET
13yrGSecL/TGilt	
ERCV	Evermore Retire
ERDO	Evermore Retire
ERDV	Evermore Retire
EREV	Evermore Retire
ERFO	Evermore Retire
ERGO	Evermore Retire
ERFV	Evermore Retire
EREO	Evermore Retire
M62	Principal FTSE A
2810	Premia Dow Jor

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Be sure to expand
the correct section
to select this option.

6. Check the **Select all** box (above the first row in the grid).
 7. Click **Add to Watchlist** and add these items to the **Health Funds** watchlist.
- Note: The Add to Watchlist icon does not appear until a box is selected in the grid.



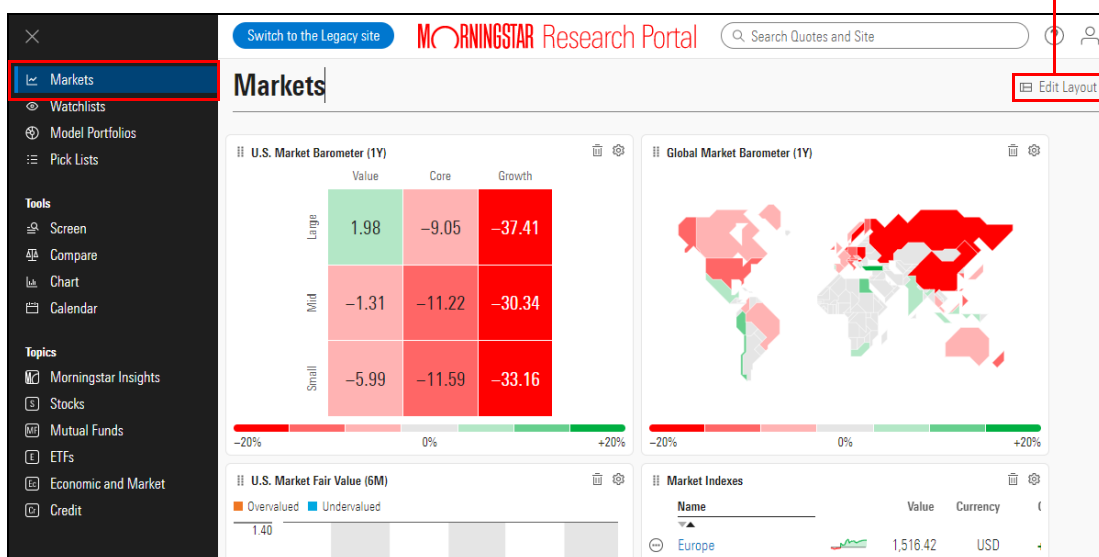
Select all rows, then use this icon to add the investments to an existing watchlist.

The Markets page can be customized to monitor the market, investments, and news content. Note that not every available widget shows by default here. For example, you can add a widget for quick and easy access to your watchlists. To personalize the dashboard to fit the needs of you and your clients, do the following:

Exercise 13: Edit the layout of the Markets page

1. From the Research Portal menu, select the **Markets** page.
2. To add a widget to the page, in the top-right corner click **Edit Layout**.

To change the layout of options on the Markets page, click this option.



Edit Layout

3. **Drag-and-drop** the **Watchlist** widget to the top left of the Markets page.

Note: The Add Tile panel closes as soon as a widget is added. Only three widgets can be included in a row on the Markets page. When more than three widgets are added to a row, the one to the right wraps to the left side of the next row.

The screenshot shows the Morningstar Research Portal Markets page. The 'Add Tile' panel is open on the right, and the 'Watchlist' widget is being dragged from the bottom of the panel to the top left of the main content area. The main content area currently displays the 'U.S. Market Barometer (1Y)' and 'Global Market Barometer (1Y)' widgets. The 'Watchlist' widget, titled 'Watchlist | Precious Metals Funds', is shown in a red box, indicating it is the widget being added.

Name	Value	Currency	Change	Change (%)
iShares MSCI Global ...	41.79	USD	+1.19	+2.93
Wesdome Gold Mines...	6.59	USD	+0.07	+1.07
VanEck Rare Earth/Str...	88.70	USD	+1.47	+1.69
SPDR® Gold Shares	162.73	USD	+0.80	+0.49
Invesco Gold & Specia...	21.21	USD	+0.61	+2.96
Invesco Emerging Ma...	18.87	USD	+0.19	+1.02
Gabelli Gold AAA	16.37	USD	+0.34	+2.12
First Eagle Gold A	21.62	USD	+0.43	+2.03

Drag-and-drop this widget into the position shown in the upper-left part of the page.

4. To change which watchlist is displayed in the Watchlist widget, click the **Settings** icon.

The screenshot shows the Morningstar Research Portal Markets page with the 'Watchlist' widget added to the top left. The 'Settings' icon (a gear icon) is highlighted with a red box, indicating it is the icon to be clicked to change the watchlist. The main content area displays the 'U.S. Market Barometer (1Y)' and 'Global Market Barometer (1Y)' widgets.

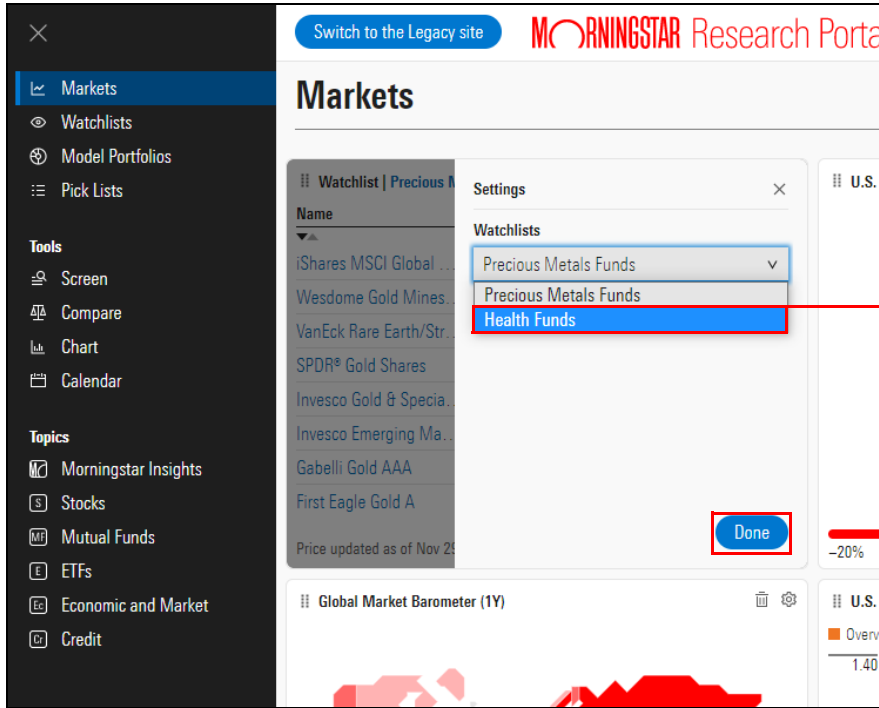
Name	Value	Currency	Change	Change (%)
iShares MSCI Global ...	41.79	USD	+1.19	+2.93
Wesdome Gold Mines...	6.59	USD	+0.07	+1.07
VanEck Rare Earth/Str...	88.70	USD	+1.47	+1.69
SPDR® Gold Shares	162.73	USD	+0.80	+0.49
Invesco Gold & Specia...	21.21	USD	+0.61	+2.96
Invesco Emerging Ma...	18.87	USD	+0.19	+1.02
Gabelli Gold AAA	16.37	USD	+0.34	+2.12
First Eagle Gold A	21.62	USD	+0.43	+2.03

Use the Settings icon to change which watchlist is shown in the widget.

5. From the **Watchlists** drop-down field, select **Health Funds**.

☞ Note: The settings options available vary for each tile.

6. To save your changes, click **Done**.



Switch to the Legacy site

MORNINGSTAR Research Portal

Markets

Watchlist | Precious Metals Funds

Settings

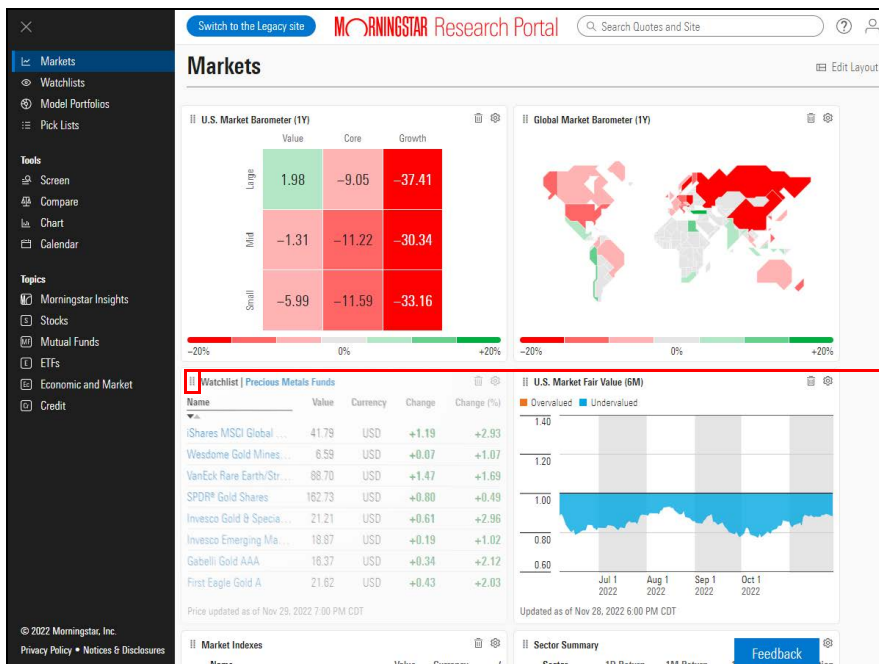
Watchlists

- Precious Metals Funds
- Precious Metals Funds
- Health Funds**

Done

Select this watchlist, then click Done.

7. To change the position of a widget on the page, use the **Handles** icon in the top-left corner of a widget to **drag-and-drop** it to a new location. Move the Watchlist widget from the top row to the second row.



Switch to the Legacy site

MORNINGSTAR Research Portal

Search Quotes and Site

Markets

Edit Layout

U.S. Market Barometer (1Y)

	Value	Core	Growth
Large	1.98	-9.05	-37.41
Mid	-1.31	-11.22	-30.34
Small	-5.99	-11.59	-33.16

Global Market Barometer (1Y)

U.S. Market Fair Value (6M)

Overvalued Undervalued

Watchlist | Precious Metals Funds

Name	Value	Currency	Change	Change (%)
iShares MSCI Global ...	41.79	USD	+1.19	+2.93
Wesdome Gold Mines ...	6.59	USD	+0.07	+1.07
VanEck Rare Earth/Str ...	88.70	USD	+1.47	+1.69
SPDR® Gold Shares	162.73	USD	+0.80	+0.49
Invesco Gold & Specia ...	21.21	USD	+0.61	+2.96
Invesco Emerging Ma ...	19.87	USD	+0.19	+1.02
Gabelli Gold AAA	16.37	USD	+0.34	+2.12
First Eagle Gold A	21.62	USD	+0.43	+2.03

Market Indexes

Sector Summary

Feedback

Use the handles to drag a widget to a new position on the page.

To remove a tile, click the Trash icon in the top right corner of the widget.

Utilizing Additional Tools

Research Portal also allows users to compare multiple securities, view sophisticated technical charts, and monitor upcoming market events such as earnings releases or economic reports.

Overview

This section offers the following exercises to help you practice these skills:

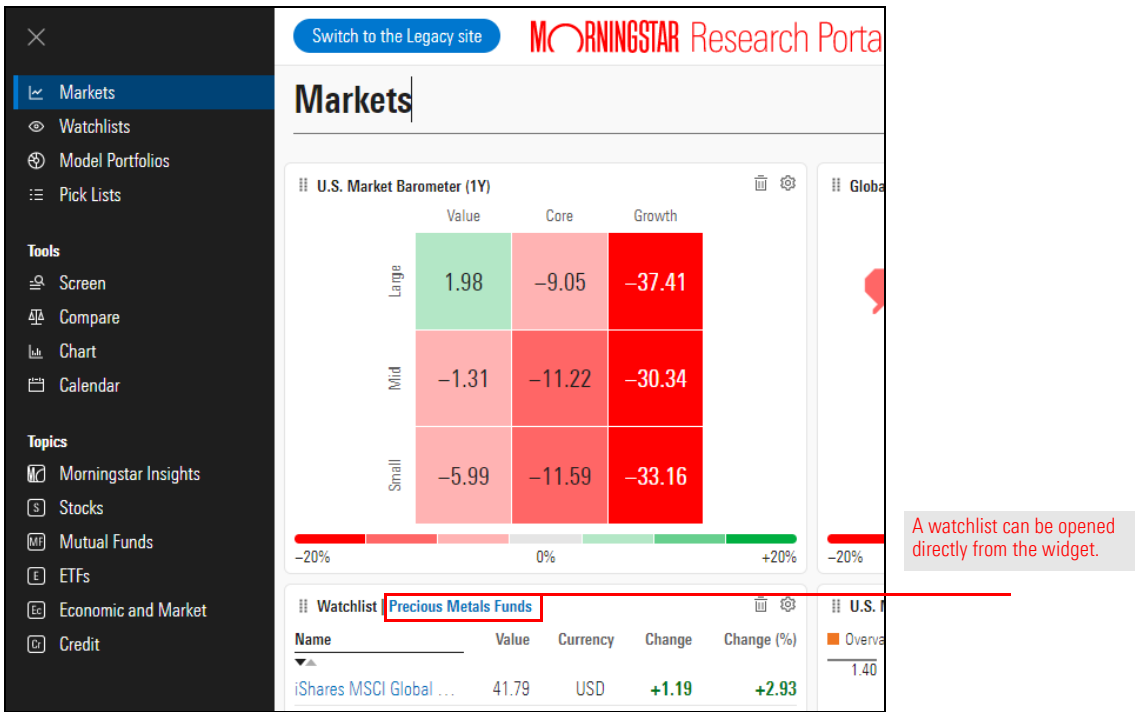
- ▶ [Exercise 14: Compare multiple securities on page 31](#)
- ▶ [Exercise 15: Compare price and return data on the Chart page on page 34](#)
- ▶ [Exercise 16: View upcoming events on the Calendar page on page 37](#), and
- ▶ [Exercise 17: Find Morningstar Methodology papers on page 38.](#)

As you search for investments, numerous criteria are available for you to compare them and see if they fit your clients’ strategy and needs.

Exercise 14: Compare multiple securities

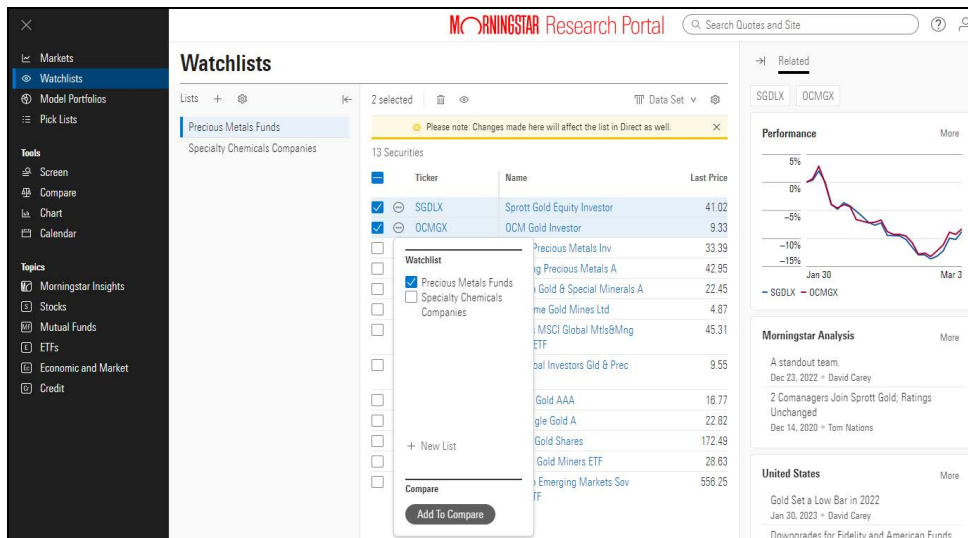
To compare two investments, do the following:

1. The Markets page should be selected. In the Watchlist widget, click the name of the **watchlist** to open it.

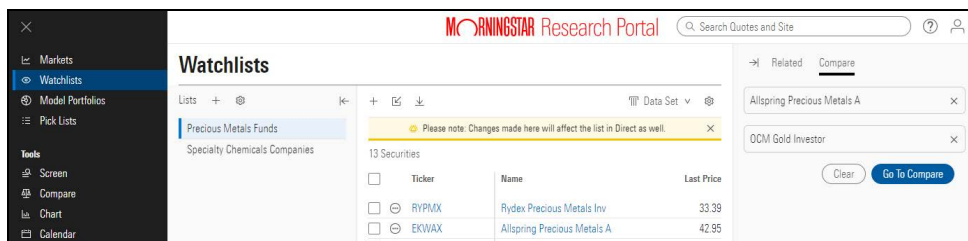


2. Check the **box** for two members of the list.

3. Click the **Add To** icon next to one of the selected items, then select **Add to Compare**. A panel opens to the right.



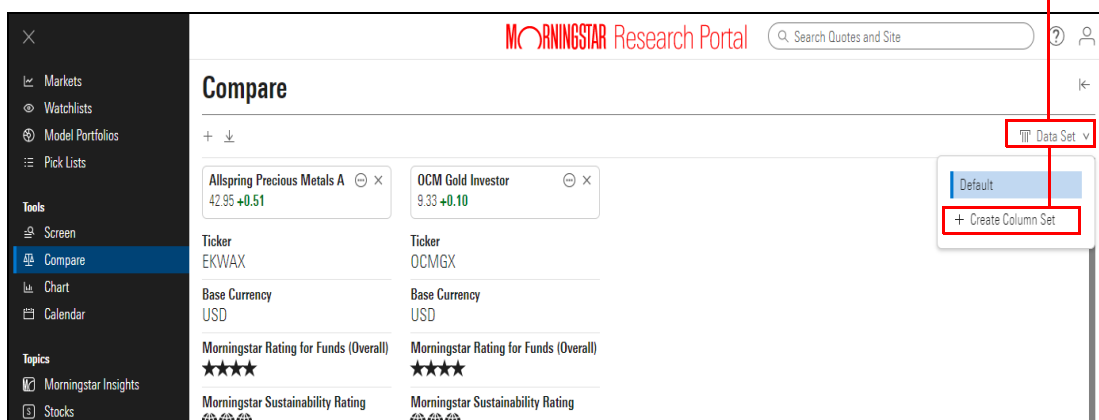
4. Click **Go To Compare**. The Compare page opens, with the two items selected.



5. To create another column set of data points, in the upper-right corner, click **Data Set > +Create Column Set**.

Note: The column set created here may also be used elsewhere in Research Portal.

Use the highlighted command to create a custom set of columns.



6. Click the **pencil** icon to **name** the column set **My Custom Columns**. Click away to save the name.
7. Note that Ticker and Name are included by default. Click **+ Add Data Point** to manually add the items you want to include. Only one data point can be added at a time.

The screenshot shows a dialog box titled "My Custom Columns" with a pencil icon next to the title. A red box highlights the "+ Add Data Point" button. Below this button is a list of data points: "Ticker", "Name", "Adjusted Expense Ratio", and "Alpha". The "Alpha" data point has a "Period" dropdown menu set to "3 Year". A "Done" button is at the bottom right of the list. At the bottom of the dialog are "Cancel" and "Save" buttons. Two red lines with callout boxes point to the pencil icon and the "+ Add Data Point" button.

Use this icon to give the column set a name.

Use this icon to add data points to the column set.

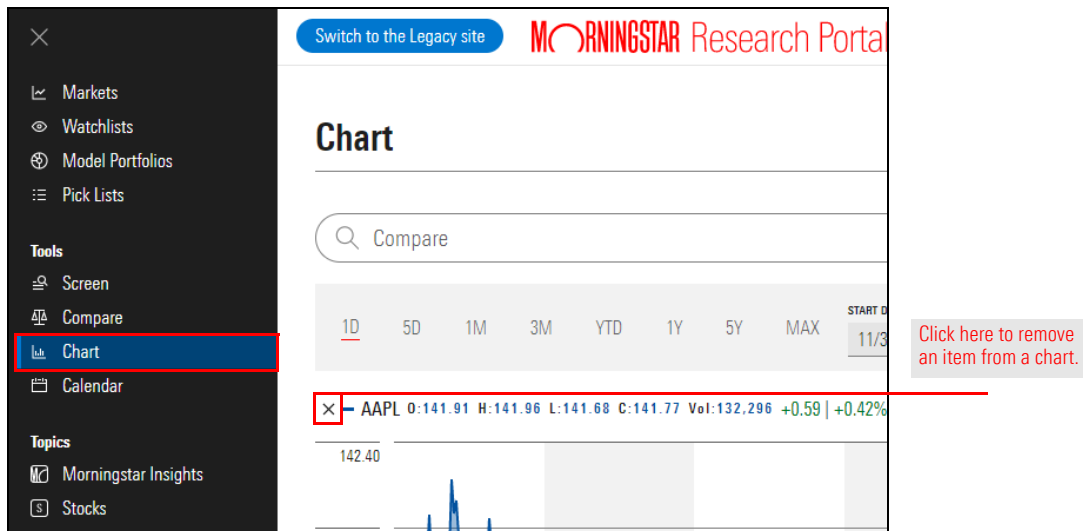
8. When finished, click **Save**.

The Chart page also allows users to compare price and return data across multiple securities. You can customize how the chart looks, and download it as well. To build a chart, do the following:

1. From the Research Portal menu, select **Chart**.
2. The chart includes AAPL by default. Click **X** to remove AAPL from the chart.

Note: If the Chart page is visited from another activity in Research Portal, such as a security page, then that security appears in the chart by default instead of AAPL.

Exercise 15: Compare price and return data on the Chart page



3. In the **Compare search** field, search for the **first security** you noted in step 2 of the previous exercise. Select its **name** when it appears.

The screenshot shows the Morningstar Research Portal interface. On the left is a dark sidebar with navigation options: Markets, Watchlists, Model Portfolios, Pick Lists, Tools (Screen, Compare, Chart, Calendar), and Topics (Morningstar Insights, Stocks, Mutual Funds, ETFs, Economic and Market, Credit). The 'Chart' option is highlighted. The main content area is titled 'Chart' and features a search bar with 'gld' entered. Below the search bar, there are two sections: 'Equities' and 'ETFs'. The 'Equities' section lists several companies with their respective tickers and exchanges. The 'ETFs' section lists several ETFs, with the first one, 'SPDR® Gold Shares', highlighted by a red box. A red line points from this box to a callout note on the right.

Equities	Ticker	Exchange
GoldON Resources Ltd	GLD	Venture
Great Lakes Dredge & Dock Corp	GLDD	NASDAQ
GoldMining Inc	GLDG	NYSE American
Idaho Champion Gold Mines Canada Inc	GLDRF	FINR
GlobalData PLC	GLDAF	FINR
Cassiar Gold Corp	GLDC	Venture
Gold Line Resources Ltd Ordinary Shares	GLDL	Venture
Golden Ridge Resources Ltd	GLDN	Venture
Golden Spike Resources Corp Ordinary Shares	GLDS	CNSX
Paramount Global BRDR	C1BS34	Brazil

ETFs	Ticker	Exchange
SPDR® Gold Shares	GLD	NYSE Arca
SPDR® Gold Shares	GLD	BMV
NewGold Issuer Limited	GLD	Johannesburg
KTAM Gold ETF Tracker	GLD	Thailand
SPDR® Gold MiniShares	GLDM	NYSE Arca

Be sure to select the investment carefully; the same name and ticker may appear on multiple exchanges.

- In the **Compare search** field, search for the **second security** you noted in step 2 of the previous exercise. Select its **name** when it appears.
- Use the **Chart Selections** and the **Chart Menu** icons to review editable data points, such as time period, data type, and fundamentals. Answer the following questions:

To see this value...	Use this selection...
Dividend Yield	
Crosshair Cursor	
% Change of Growth	
Candlestick Chart	
Dashed lines background	

Note: To reset the chart settings, click the **Clear Chart** icon.

This is the Chart Selections icon.

This is the Chart Menu icon.

- To export an image of the chart to continue reviewing data outside of Research Portal, from the **Chart Menu** icon, select **Generate Image**.

Upcoming market events, including IPOs, earning calls, and stock splits can be tracked from the Calendar page. To research upcoming market events, do the following:

Exercise 16: View upcoming events on the Calendar page

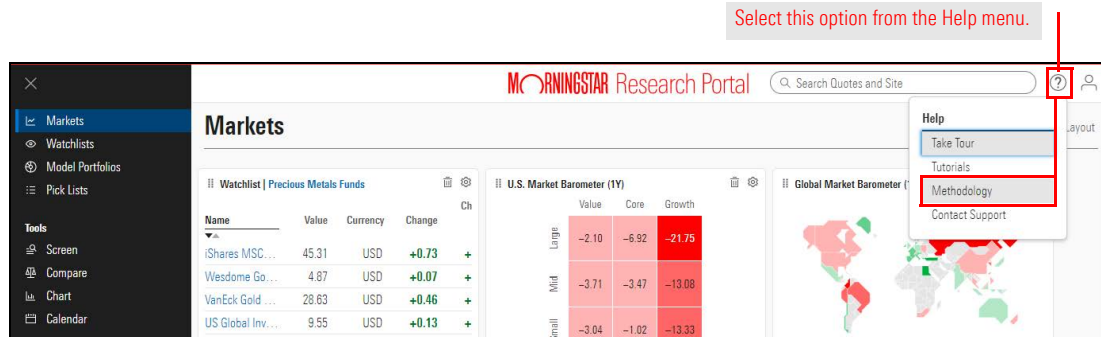
1. From the Research Portal menu, select **Calendar**.
2. From the Date calendar, select **the next business day's date**.
3. Under Events, select **Earnings**.
 ☞ Note: If no earnings are scheduled for that day, select one of the other options that has available items.
4. Click a **tile** for one of the Expected Earnings companies to review the Morningstar report for that company.

The screenshot shows the Morningstar Research Portal interface. On the left sidebar, the 'Calendar' option is highlighted under the 'Tools' section. The main content area is titled 'Calendar' and shows a date range from November 27 to December 3. The 'Events' section is expanded, and 'Earnings' is selected, showing 88 items. A red box highlights the 'Earnings' option in the Events list. Another red box highlights the 'Expected Earnings' section for 'Agricultural Bank of China Ltd ADR ACGBY', which shows an expected date of Dec 1, 2022. A third red box highlights the 'Expected Earnings' section for 'The Toronto-Dominion Bank TD', which shows an expected date of Dec 1, 2022, and a consensus estimate of \$1.50. A red line connects the 'Earnings' option in the Events list to the 'Expected Earnings' sections. A text box on the right says: 'Select this option from a trading day where earnings are available, then select a tile to learn more about a company.'

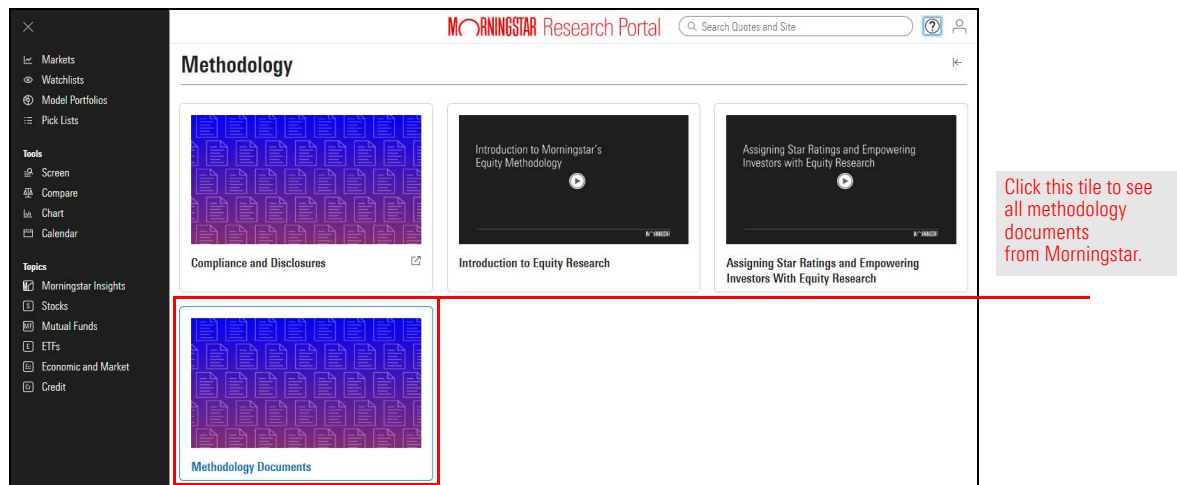
In addition to tools and data, the Morningstar Research Portal also allows users to find and read various Morningstar Methodology papers. The Methodology page offers a tile to find any individual methodology paper. To find this content, do the following:

Exercise 17: Find Morningstar Methodology papers

1. From the header, click the **Help** icon, then select **Methodology**. The Methodology page opens.



2. Click the **Methodology Documents** tile. The Morningstar Methodology page opens.



All methodology papers from Morningstar are shown; click the headline for any one to read it. Note that these are sorted in chronological order, with the most recently published paper appearing at the top.

