

MORNINGSTAR LIBRARY EDITION

Use **Morningstar Library Edition (MLE)** to research stocks and mutual funds and to analyze portfolios. **MLE** is accessible at all libraries in the Chester County Library System for in-library use only.

Morningstar Library Edition has three search options: **Screeners**, **Reports** and the **Portfolio X-Ray**.

Screeners:

Use the **Screeners** tool to search for over 18,000 stocks and funds that meet specific criteria, using **Morningstar Screens** or create your own.

- **Click** on **Screeners** on the main **MLE** screen.
- Choose between stocks and funds.
- Choose criteria to build a custom screen or **click** on **Morningstar Screens** to pick an existing screen.
- Keep adding criteria to your screen until you are satisfied with the search
- **Click** the button near the bottom right of the screen to see the results of the screen.

Reports:

Use the **Reports** option to look up a particular stock or mutual fund.

- Enter the name of the company or mutual fund or search by ticker symbol.
- If the company or fund is in the database, a quote page will display.
- Look to the left side of the page for other options including **Analyst Report** (if available), **Morningstar Rating**, **Data Interpreter**, **Valuation Ratios**, **Financial Statements**, **Key Ratios** and **SEC Filings**.

Portfolio X-Ray:

Use the **Portfolio X-Ray** to see how your portfolio shapes up.

- **Click** on **Portfolio X-Ray** from the main **MLE** screen.
- Enter the ticker symbols of your stocks and funds and the allocation of each in your portfolio (there is an equal allocation option).
- **Click** the **View your Portfolio X-Ray** button to see the results.
- An **X-Ray overview** will display. There are additional views including diagnostics, stock intersection, asset class and stock stats.
- Portfolio X-Rays may not be saved but can be printed.

Morningstar Library Edition also includes a **Help & Education Center**. This resource includes training seminars on using **Morningstar Library Edition**, the investing classroom and a glossary of investment terms used by the database.