**Power of Service – NMHU – Dr. Kent Tucker**

**How to Log In to Morningstar – After Subscribing to the Basic Membership**

1. Type in **Morningstar.com** and hit enter.
2. **Morningstar | Empowering Investor Success** is displayed on your computer screen. Click on the icon. The Morningstar webpage is displayed.
3. **Sign Up** and **Sign In** are displayed on the top-right of the computer screen. Click **Sign In** at the top – right of the computer screen.
4. If **Sign Up** is not displayed at the top – right of the computer screen, but a circle and upside-down U character (stick figure) is displayed instead, click the **stick figure**. (This stick figure is sometimes displayed when the computer screen is sized at as an example 150%). Click the three dots and reduce the %, this can bring up **Sign Up** and **Sign In** being displayed. Click **Sign In** at the top – right of the computer screen.

1. Sign In to Morningstar is displayed at the top-center of the computer screen. Two grey strips are displayed – **Email** and **Password**. Type in your **Email** in the grey strip – top – middle of the computer screen.
2. Type in **Password** in the grey strip – top – middle of the computer screen.
3. Click the blue **Sign In** icon, bottom right of the computer screen. You are taken back to the Morningstar webpage.
4. Click **Research** in grey – top – middle of computer screen, below the Morningstar logo in red. A Drop - Down menu appears. Five items are listed. **Mutual Funds, Stocks, ETFs, Bonds, Best Investments.**
5. Click **Mutual Funds** from the Drop – Down menu.

10.Scroll down the page. Click under **Tools** in black – middle of

 computer screen - **Fund Quickrank**.

1. Two strips occur at the top – left and center of the computer

 screen. **All Morningstar Categories** and **Enter name or ticker**.

12. Type in **Enter name or ticker** strip – **Vanguard** or any other

 investment company that offers mutual funds such as T.Rowe

 Price, Fidelity and Black Rock. Or Type in the **Ticker Symbol** of

 the mutual fund. Attendees of the Power of Service

 presentation on 10-28-21 will use the ticker symbol of the

 Vanguard Standard and Poor’s 500 index mutual fund of **VFIAX**.

 Type in **VFIAX** and click **Search**, top middle of computer screen.

 Acquiring a mutual funds ticker symbol through Google or other

 search engines prior to logging into Morningstar, speeds up the

 process of researching mutual funds. The mutual fund is

 displayed – **Vanguard 500 Index Fund Admiral Shares Large**

 **Blend**. Click – **Vanguard 500 Index Fund Admiral Shares Large**

 **Blend**.

 13. Vanguard has several different types of mutual fund shares, with

 the two most popular - **Admiral Shares** and **Investor**

 **Shares**. **Investor Shares** usually (but not always) require a

 $3,000 minimum investment, while **Admiral Shares** usually (but

 not always) require a $10,000 minimum investment. The

 **Investor Shares** charge a higher **Expense Ratio** such as .14%.

 The **Admiral Shares** charge a lower **Expense Ratio** such as .04%.

 Other investment company’s also have different classifications of

 shares with differing minimum investments and differing

 **Expense Ratios**. Usually the higher the minimum investment,

 the lower the **Expense Ratio**. Some minimum investments can

 be very high such as $10,000,000 minimum investment.

 14. Once you click - **Vanguard 500 Index Fund Admiral Shares Large**

 **Blend**, you are into the Morningstar website with information

 about this individual mutual fund. There are nine icons displayed

 – **Quote**, **Fund Analysis**, **Performance**, **Risk**, **Price**, **Portfolio**,

 **People**, **Parent** and **Crowd Sense**. Researches will use – **Quote**,

 **Performance**, **Risk**, **Price**, **Portfolio**, **People**, and **Parent**. **Fund**

 **Analysis** and **Crowd Sense** will not be utilized in the research.

 15. Congratulations – you are ready to research various mutual funds

 – good job researcher!

 16. When a researcher is finished utilizing the Morningstar website.

 On the top right of the computer screen is displayed – **My**

 **Account**. Click on the **My Account** icon and a drop-down menu

 appears. Click **Sign Out** at the bottom of the drop-down menu.

 Click the **X** in the top right of the computer screen. You have

 Successfully logged out of the Morningstar website/data-base.

End