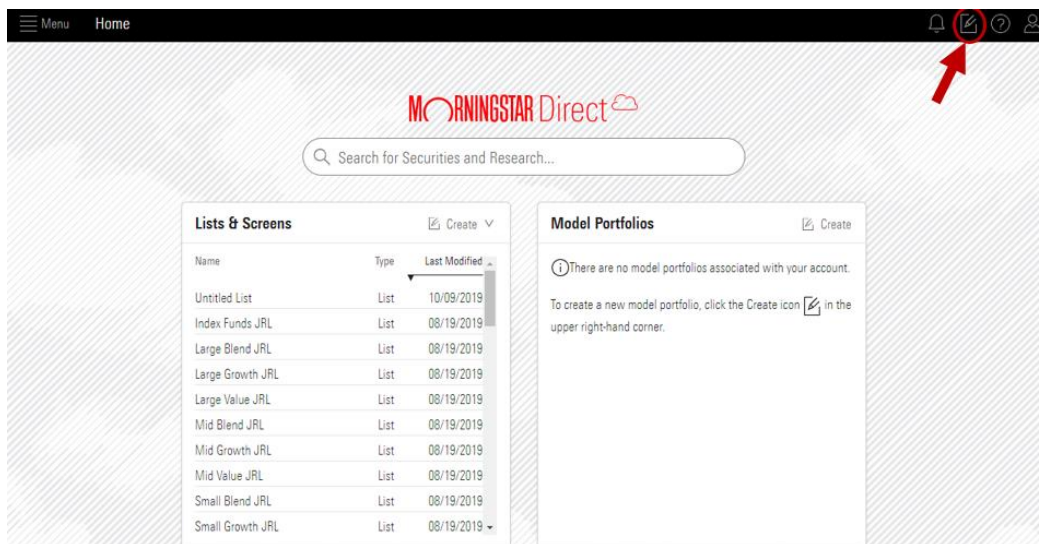
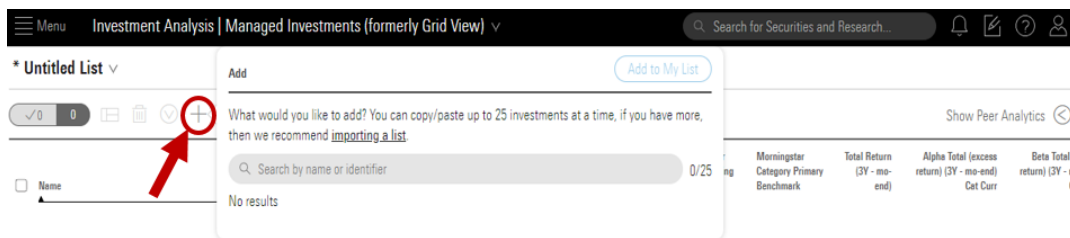


## Morningstar Direct Trading Room Tutorial

1. Go to: <https://direct.morningstar.com/framework/login>
2. Log in with Username: **tradingroom@bentley.edu** and Password: **Bentley1**
3. On the homepage, click on the “Create” icon in the top right corner and select “List”.



4. On the list, click the “+” sign to Add securities.



Your list is currently empty. Add investments, open an existing list, or use Screener to load items into the Grid.

- Type the name of your desired security into the search bar and click on it. Once you have clicked on the security, it will be added to the list (**\*NOTE\* Morningstar allows selecting up to 25 investments at a time**).

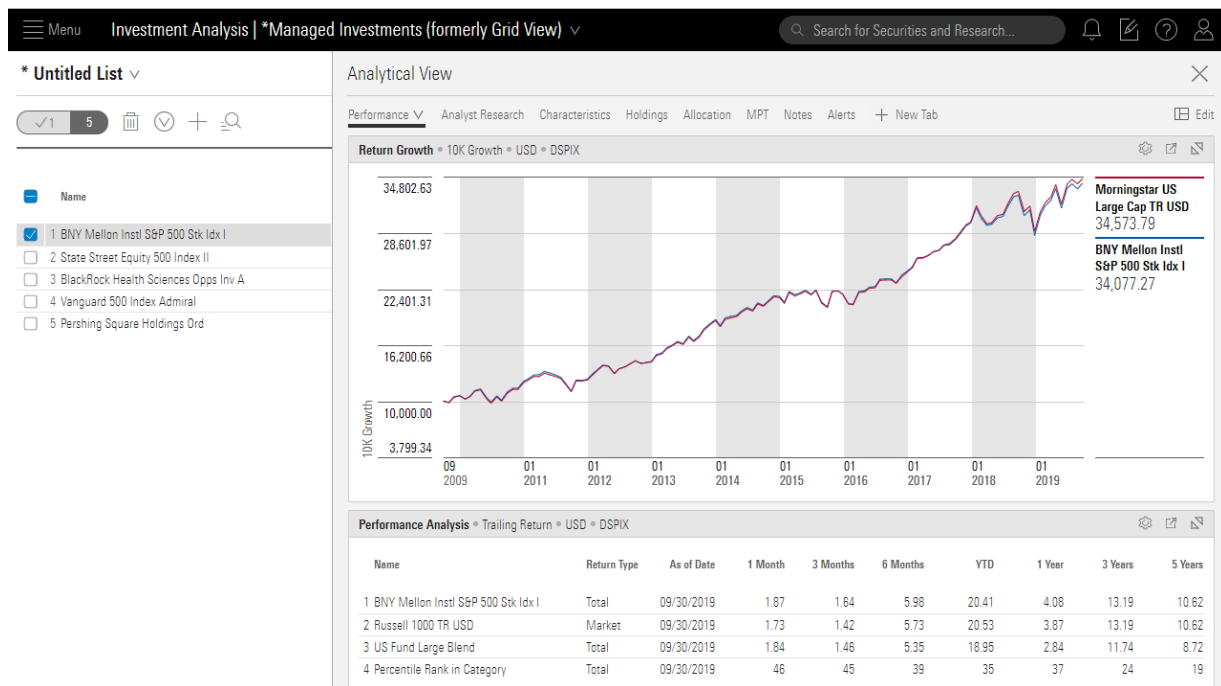
The screenshot shows the Morningstar search interface. A search bar contains the text 'Vanguard'. Below the search bar, a list of investment options is displayed with columns for Investment Name, Ticker, Exchange, and Investment Type. The first item is 'Vanguard 500 Index Admiral' with ticker 'VFIAX' and exchange 'NASDAQ'. Other items include various Vanguard Total Stock and Bond funds.

- Once the securities are added, Morningstar’s ratings and portfolio metrics will populate within each of the columns.

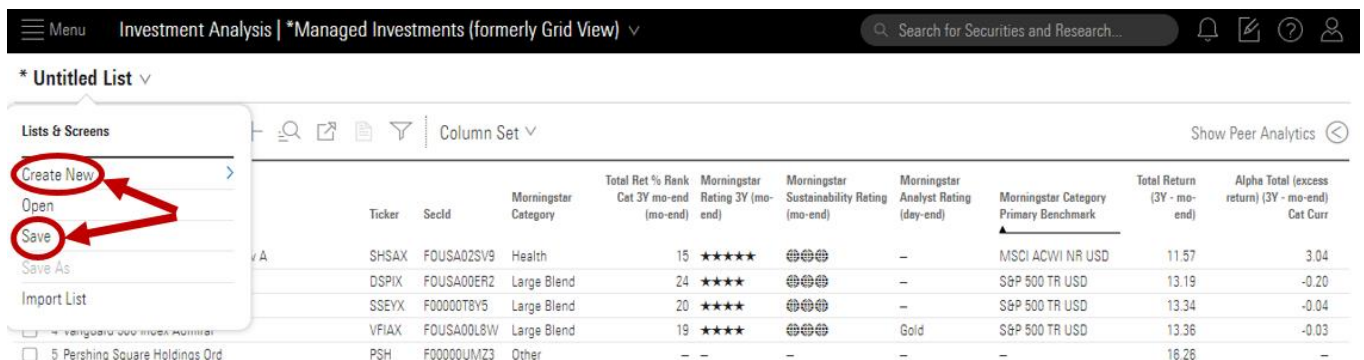
The screenshot shows the Morningstar portfolio view. A table displays the following data for five investments:

Name	Ticker	SecId	Morningstar Category	Total Ret % Rank Cat 3Y (mo-end)	Morningstar Rating 3Y (mo-end)	Morningstar Sustainability Rating (mo-end)	Morningstar Analyst Rating (day-end)	Morningstar Category Primary Benchmark	Total Return (3Y - mo-end)	Alpha Total (excess return) (3Y - mo-end) Cat Curr
1 BNY Mellon Instl S&P 500 Stk Idx I	DSPIX	FOUSA00ER2	Large Blend	24	★★★★	🌐🌐🌐	–	S&P 500 TR USD	13.19	-0.20
2 State Street Equity 500 Index II	SSEYX	F0000078Y5	Large Blend	20	★★★★	🌐🌐🌐	–	S&P 500 TR USD	13.34	-0.04
3 BlackRock Health Sciences Opps Inv A	SHSAX	FOUSA02SV9	Health	15	★★★★★	🌐🌐🌐	–	MSCI ACWI NR ...	11.57	3.04
4 Vanguard 500 Index Admiral	VFIAX	FOUSA00L8W	Large Blend	19	★★★★	🌐🌐🌐	Gold	S&P 500 TR USD	13.36	-0.03
5 Pershing Square Holdings Ord	PSH	F00000UM23	Other	–	–	–	–	–	16.26	–

- To learn more about the securities within your list, simply select the security and a pop-up window will appear. Information displayed includes the security’s “Performance”, “Analyst Research”, “Characteristics”, “Holdings” and Modern Portfolio Theory (“MPT”) metrics.



- In order to save your list, click on the down arrow next to “Untitled List” and select “Save”. Once your list is saved, you can select “Create New” to produce a new “List” or “Screen”.



9. You have the option to export your list to Excel by clicking on the “Export” icon and selecting “Export .xlsx”.

The screenshot shows the Morningstar Investment Analysis interface. At the top, there is a navigation bar with 'Menu', 'Investment Analysis | \*Managed Investments (formerly Grid View)', and a search bar. Below this is a toolbar with various icons, including an 'Export' icon (a document with a download arrow) which is circled in red. A dropdown menu is open from this icon, showing two options: 'Export.csv' and 'Export.xlsx', with 'Export.xlsx' also circled in red. A red arrow points from the 'Export.xlsx' option back to the 'Export' icon. Below the menu is a table of investment data.

Name	Morningstar Category	Total Ret % Rank Cat 3Y mo-end (mo-end)	Morningstar Rating 3Y (mo-end)	Morningstar Sustainability Rating (mo-end)	Morningstar Analyst Rating (day-end)	Morningstar Category Primary Benchmark	Total Return (3Y - mo-end)	Alpha Total (excess return) (3Y - mo-end) Cat Curr
1 BlackRock Health	Health	15	★★★★★	④④④④	–	MSCI ACWI NR ...	11.57	3.04
2 Pershing Square	Other	–	–	–	–	–	16.26	–
3 BNY Mellon Instl S...	Large Blend	24	★★★★	④④④④	–	S&P 500 TR USD	13.19	-0.20
4 State Street Equity 500 Index II	Large Blend	20	★★★★	④④④④	–	S&P 500 TR USD	13.34	-0.04
5 Vanguard 500 Index Admiral	Large Blend	19	★★★★	④④④④	Gold	S&P 500 TR USD	13.36	-0.03