

# Disclaimer

This presentation is for educational purposes only intended for the Olli Investing for a Successful Retirement Class. **This presentation is not investment advice.** Consider your own situation carefully and consult with a properly licensed and accredited professional before making or disposing of any investments involving real money or value.

**No Mutual Funds, ETFs or Stocks or Indexes** mentioned in this report or in class is a recommendation to buy, hold or sell.

# Using Morningstar

November 5, 2025



## Using Morningstar

- ▶ Morningstar via Fairfax County Library
  - ▶ Obtain out of state library card
  - ▶ Library Website - “Databases”
  - ▶ Access Morningstar
  
- ▶ Morningstar - Overview
  - ▶ Website changed in late 2023
  - ▶ Opening page now significantly different
  - ▶ How to Get Around - Sidebar
  
- ▶ Review Morningstar Investment Information
  - ▶ Demonstrate using the website

# Fairfax Library - Morningstar

- ▶ **Obtain out of state library card:**
  - ▶ \$50 1yr, \$75 2yrs, \$100 3yrs
- ▶ **Go to the Fairfax County website, complete application**
- ▶ **After you obtain card go to library website**
  - ▶ **Select Research Center then All Databases**
  - ▶ **A – Z Databases is the next screen, enter “M” then scroll to Morningstar**

Source: Fairfax County Library website

## Fairfax Library - Morningstar

### Library

[Home](#) / [Library](#) / Non-Resident Library Card Application

CONTACT INFORMATION: Office: 8:00–4:30 M–F, Branch: hours vary. Please call your branch's direct line with account and eBook questions.



703-324-3100  
TTY 711



[wwwlib@fairfaxcounty.gov](mailto:wwwlib@fairfaxcounty.gov)



12000 Government Center Parkway, Suite 324  
Fairfax, VA 22035

#### Non-Resident Library Card Application

If you live in the United States but your home address is not in Fairfax County, the City of Fairfax, or [a reciprocal jurisdiction](#), you may apply for a non-resident card with a fee. The fee must be paid before the card may be used.

You may select one of three options:

- 1 year: \$50
- 2 year: \$75
- 3 year: \$100

Your application will be processed within 7 business days; you will then receive an email with your account number and instructions for paying the fee.

Link: <https://www.fairfaxcounty.gov/library/non-resident-library-card-application>

Source: Fairfax County Library website

# Fairfax Library Databases Search



Search ▾ Didn't Find It? ▾ My Account ▾ Library Info ▾ Library Services ▾ Help ▾

What to Read? ▾

- Find Your Next Book
- Novelist
- Book Group Discussion Kits

Quick search:


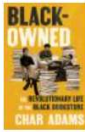
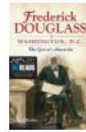

eBooks / eAudio / eMagazines ▾

- eBooks
- eAudio
- eMagazines
- Guide to Using eBooks

Research Center ▾

- All Databases
- Research Guides
- Grants Center

Black voices and legacies in American democracy

			
What was the Harlem Renaissance? Smith, Sherri L.	Black-owned : the revolutionary life of the Bla... Adams, Char	Frederick Douglass in Washington, D.C. : the li... : the li... Muller, John, 1984-	Black boy : (American hunger) : a record of chi... of chi... Wright, Richard, 1908-1960...

Source: Fairfax County Library website

# Fairfax Library Databases Search

## A-Z Online Resources

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Find the best library databases for your research.

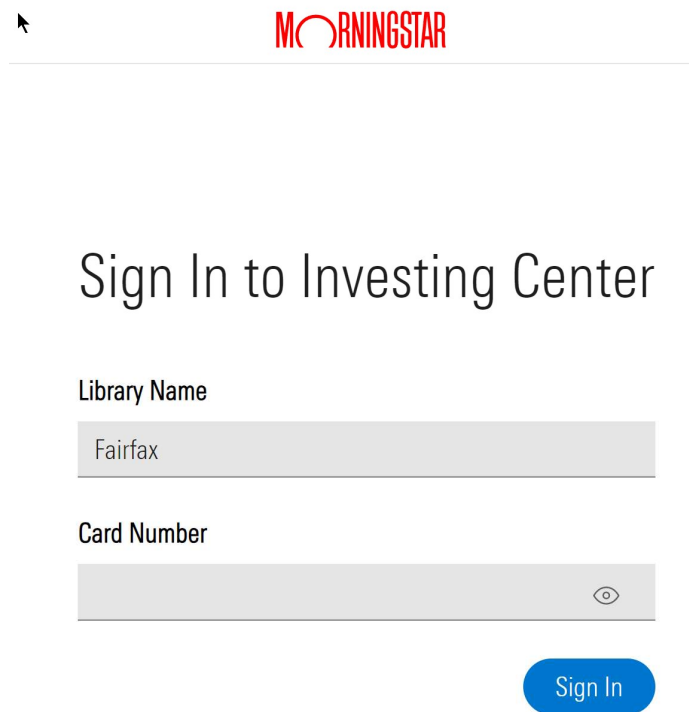
All A B C D E F G H I J K L M N O P Q R S T



7 Databases found

Source: Fairfax County Library website

# Log in again to access Morningstar (old page to 2-23-26)



The screenshot shows the Morningstar login interface. At the top, the Morningstar logo is displayed in red. Below the logo, the text "Sign In to Investing Center" is centered. There are two input fields: "Library Name" with the value "Fairfax" and "Card Number" which is currently empty. A blue "Sign In" button is located below the input fields. A mouse cursor is visible near the top left of the page.

MORNINGSTAR

## Sign In to Investing Center

Library Name  
Fairfax

Card Number

Sign In

Source: Fairfax County Library website

# Log in again to access Morningstar (new page after 2-23-26)

Fairfax County Public Library (FCPL)

## Login

Type in your barcode and password to access the subscribed sources.


Source: Fairfax County Library website

# New Morningstar Home Page

Morningstar Investing Center
Search Quotes and Site

Close

- Home
- Morningstar Research
- Morningstar Insights
- Stocks
- Mutual Funds
- ETFs
- 529 Plan Center
- Economic and Market
- Credit
- Morningstar Webinars
- Screen
- Compare
- Chart
- Calendar
- Investing Classroom
- Morningstar Document Library

### U.S. Market Barometer (YTD)

	Value	Core	Growth
Large	10.54	7.72	19.62
Mid	6.22	5.16	9.24
Small	3.27	5.01	12.41

Updated as of Oct 17, 2025, 4:19 PM UTC-4

### Global Market Barometer (1Y)

-20% 0% +20%

### Market Indexes

Name	Value	Change	Change(%)	Currency
Europe	Closed 2,188.90	-22.49	-1.02%	—
Global Markets	Closed 5,846.82	-63.35	-1.07%	—
Japan	Closed 2,531.19	-20.59	-0.81%	—
S&P 500	Closed 6,664.01	+34.94	+0.53%	USD
U.S. Markets	Closed 16,210.30	+76.61	+0.47%	USD

### Sector Summary

Sector	1D Return	1M Return	1Y Return	YTD Return	Val
US Cyclical	+0.62%	+6.28%	+38.15%	+22.68%	
US Basic Materials	-0.50%	+0.93%	+22.45%	+10.00%	
US Consumer Cyclical	+0.55%	+5.08%	+31.41%	+17.01%	
US Financial Services	+0.84%	+9.30%	+49.21%	+32.34%	
US Real Estate	+0.71%	-2.02%	+22.22%	+5.94%	
US Defensive	+0.60%	-1.97%	+18.77%	+11.81%	
US Consumer Defensive	+1.16%	-1.12%	+18.31%	+12.20%	

### Latest in Economic and Market

**Why Mortgage Rates Might Not Keep Going Down**  
The Fed is cutting interest rates, but analysts expect mortgage rates to remain relatively steady at around 6% in 2026.  
Sarah Hansen • Oct 15, 2025

**The Markets Are Walking a Tightrope. How Can Investors Find The Footing?**  
With stocks fully valued, global growth slowing, and the AI buildout boom we discuss how investors can position their portfolios in today's evolving landscape.  
David Sekera, CFA • Oct 14, 2025

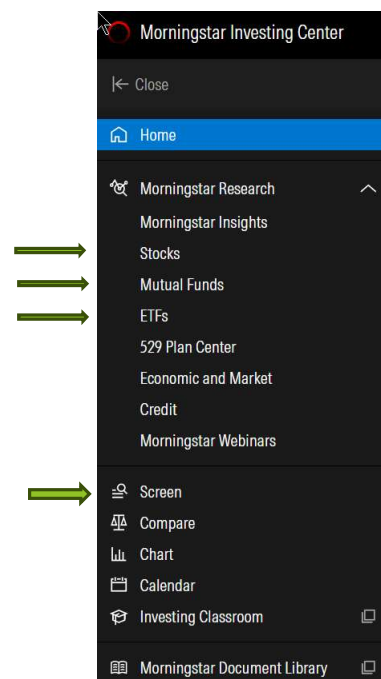
**Can the Gold Rush Continue? Warning Signs for Investors**  
The yellow metal has been on a tear, but caution may be warranted.  
Amy C. Arnett, CFA • Oct 10, 2025

**4 New Stocks to Buy Now and Hold for the Long Term**  
Plus, our Q4 2025 stock market outlook.  
David Sekera, CFA • Oct 6, 2025

**How Inflation, AI, and Budget Battles Will Shape the Stock Market Q4**  
Plus, a look at Nvidia's potentially record-breaking AI investment.  
Sarah Hansen • Oct 3, 2025

Source: Morningstar

# Morningstar - Let's Look at the Sidebar



Source: Morningstar Website