

Morningstar Fund Screener Features

The Fund Screener enables users to create a shortlist of funds which meet their specified criteria. These can include returns, risk characteristics and the nature of the portfolio.

1 Fund Type

This allows you to select the best funds for your research using this section of the Fund Screener. Start by using Morningstar Categories, style-based peer groups. Build your top funds list using the funds universe dropdown. Base currency is helpful for finding funds priced in US dollar or the currency of your preference. If you're looking for income funds, select Inc under Distribution Status; for funds that reinvest their distributions, select Acc for Accumulation.

2 Fund Portfolio

You can use the Morningstar Equity or Fixed income style boxes to identify what funds the portfolio primarily invests in. The Equity Style Box can be used to select the average market cap and investing style of funds for your research. For example if you are interested in large-cap, mid-cap, or small-cap shares and are a value, blend, or growth investor. The Fixed Income Style Box combines interest rate sensitivity (short, interim and long) and credit-quality (high, medium and low). Total net assets slider bar is useful in gauging a fund's size, agility, and popularity. Use the sliders on the bar at left to select a range.

3 Fund Performance & Risk

Use the return screens to find funds that have outperformed their category average or a specific return threshold.

The screenshot displays the Morningstar Fund Screener interface, which is divided into three main sections, each with a numbered callout (1, 2, and 3) on the right side. At the top, there is a navigation bar with 'Fund Screener', 'Performance Currency: USD', and 'Morningstar Tools'. A 'Total Results: 113' indicator is visible in the top right corner.

Section 1: Fund Type (Callout 1): This section includes dropdown menus for 'Fund Universe' (set to 'Open'), 'Fund Company' (set to 'All Companies'), 'Morningstar Category' (set to 'All Morningstar Categories'), and 'Base Currency' (set to 'All Currencies'). There are also checkboxes for 'Distribution Status' with 'Inc' and 'Acc' options. To the right, a text box explains the purpose of the Fund Type section, starting with 'What is the Fund Type section about?' and providing instructions on how to use the filters.

Section 2: Fund Portfolio (Callout 2): This section features two style boxes: 'Primarily invests in Equity' and 'Fixed-Income'. The Equity box has a 3x3 grid for market cap (Large, Mid, Small) and investing style (Value, Blend, Growth). The Fixed-Income box has a 3x3 grid for interest rate sensitivity (Short, Interim, Long) and credit-quality (High, Med, Low). Below these are dropdowns for 'Largest sector' and 'Region', and a 'Total Net Assets (USD)' slider bar ranging from 0 to 3 Bil. To the right, a text box explains the purpose of the Fund Portfolio section, starting with 'What is the Fund Portfolio section about?' and providing instructions on how to use the style boxes and sliders.

Section 3: Fund Performance & Risk (Callout 3): This section includes dropdowns for 'General Risk Rating' (set to 'All') and 'Sharpe Ratio' (set to 'All'). Below these are return screens for various periods: '3 Months', '6 Months', 'YTD', '1 Year', '3 Year', '5 Year', and '10 Year'. Each screen has a radio button for 'Please select ...' and a yellow bar for selecting a return threshold. To the right, a text box explains the purpose of the Fund Performance and Risk section, starting with 'What is the Fund Performance and Risk section about?' and providing instructions on how to use the return screens.

At the bottom of the interface, there is a 'Total Results: 113' indicator, 'Reset' and 'Search' buttons, and a 'Glossary' link. The footer contains the copyright notice '© Copyright 2009 Morningstar. All rights reserved. Please read our Terms of Use.' and the Morningstar logo.