Morningstar Direct is added to the McLeod Business Library’s lineup of databases

The McLeod Business Library has added another database to the business research tools available to the faculty, staff and students of the Mason School of Business. Morningstar Direct was added to the database lineup in September. It promises to be a valuable tool for investment research.

Morningstar Direct is a web-based research platform that connects institutional investment professionals directly to Morningstar's full universe of investment research and data (including current and historical). The program equips the user with tools for selecting, developing, and monitoring investments.

Accessing Morningstar Direct

This database is available to all patrons. Patrons may access this program by using one of the many computer workstations in the McLeod Business Library in Alan B. Miller Hall. Morningstar Direct is also installed on the computers in the Acuff Financial Markets Center.

Morningstar Direct is installed on the local computers.

Updated books in the Business Library

The McLeod Business Library has received updates for some of our books. Please refer to the sidebar, Updated Books in the Business Library, for a listing of these items.

One of the books, *Industry norms and key business ratios*, is from Dun and Bradstreet. This is an annual publication that provides benchmark financial performance ratios per industry code, and gives additional breakdowns by asset size (large, medium, and small-size firms). It contains information from more than one million financial statements from public and private U.S. corporations,
(that is, it can only be used from the computer on which it is installed) in the McLeod Business Library and Acuff Financial Markets Center.

**Using Morningstar Direct**

To use the Morningstar Direct database in the McLeod Business Library simply click on the icon on the desktop of one of the public-access computers in the Library Research Room (Rm. 2034A). This will open the logon screen. The user ID is already entered so all the patron has to do is enter the password. Each of the Business Library computers has the password displayed on the monitor frame. Enter the password into the data field and click on the Log In button.

This will open the program to the Home page. The Home page has some general information displayed under several headings including Markets, Security Analysis, Market Barometer, and more. The left side of the page has a menu column with eight selections.

These selections are Home, Local Databases, Global Databases, Performance Attribution, Performance Reporting, Fund Flows, Presentation Studio (not available in the Business Library) and Workspace. Clicking on one of these selections will open more selections in a sub-menu below the selected heading.

The Home selection is displayed when the page is first opened. Clicking on a sub-menu item will display a new page in the main part of the screen.

**Local and Global Databases**

When using the Local or Global Databases selections the initial display is of a list of Morningstar-defined universes. Each selection in the sub-menu items will have one or more universes from which to choose. Clicking on the name of the universe on the left side of the page open similar pages. Each selection will also display numerous sub-menu selections. Each selection will open a page with a list of Morningstar-defined universes. Clicking on a universe will open the page for that universe. The Stock Analysis/News/report selection in the Local Databases section is pictured above.

The Local Databases and Global Databases selections in the menu column allow database users to implement performance attribution analysis on their portfolios will display that list. These selections open with the Snapshot view displayed. The View data field has a drop-down menu with more than 25 other views to select. The view displays each have numerous columns of data, varying from view to view.

Each view may be saved, exported, or displayed in a PDF file. The buttons controlling these functions are located near the top of the list. Items are selected from the list by clicking on the check box next to the items you want to save or export. Saved items are saved in a file under Saved Reports in the Workspace selection.

**Performance Attribution and Reporting**

An important part of the Morningstar
The Performance Attributions and Reporting selections allow users to implement performance attribution analysis on the equity portion of their portfolios or any of the more than 30,000 equity portfolios in the Morningstar database.

Taking a holdings-based approach, it compares portfolio performance to a benchmark and analyzes the effects of a manager’s weighting and selection decisions. Essential to competitive research and due diligence, attribution analysis in Morningstar Direct can be tailored to a manager’s style, whether top-down or bottom-up, and by using either arithmetic or geometric calculations.

These reports may be saved to the Workspace area of the database.

The Fund Flows selection opens with the US Open-End fund information displayed. The Market data field near the top of the page allows you to select other markets to research. There are more than 45 markets listed in the drop-down menu for this data field.

This data may be exported or printed. Exporting files may be opened in Microsoft Excel or saved to your removable media (i.e., USB flash drive) for later use.

The Workspace selection of the menu column displays a list of submenu items that are available for the user to save or perform other functions on information in the database.

Workspace

The Workspace selection opens with the My Lists selection displayed. There are more than ten selections in this section, including Investment Lists, Search Criteria, Report Templates, Saved Reports and many more. Each will open a display of information or lists that have been saved to the database folders.

If you are working on Morningstar you must save your data to a removable media or you will have to ensure you return to the same computer each time you use Morningstar Direct. Other users may access your saved data and may modify it or delete it. Saving material to your removable media (i.e., USB flash drive) is the best solution to protect your research.

Access to the Business Library databases just got a lot faster

If you have been plagued by slow access and spotty availability when trying to log onto the Business Library databases server you are in for a treat. The Mason School of Business IT department has recently finished upgrading the database server and the difference in the log on time and database performance compared to the old server is phenomenal.

Please give the new server a try and test its response time for yourself.
Bloomberg

Feature of this program is its analytic ability, helping patrons understand the markets by means of tools linked to up-to-the-minute information.

Casual users may request library staff to log them onto the terminals. There is a staff member at the information/reserve desk in the main library room (Room 2034).

If you need assistance in creating your own logon please contact a member of the library staff. Training on the Bloomberg program is available each Friday in the Business Library (room 2036) from 12:00 to 1:30 P.M. This training is provided by a member of the library staff on a first-come-first-serve basis.

Books

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Partnerships, and proprietorships, in all size ranges, including more than 800 different lines of business. You may use this book to compare a company’s performance against its industry/competitors or to see trends in industry performance over time. It includes solvency, efficiency, and profitability ratios.

Who’s who in finance and business offers 25,000 detailed biographical profiles from the world of finance and business. This volume includes individuals from more than 100 countries. Fields of expertise include accounting, advertising, banking, information technology, communications, manufacturing, retail trade, and others. Future editions of this book will be available in electronic format and available online.

A serial directed to the marketing community is Marketer’s guide to media. The 2009 edition is now available in the Business Library. This serial is designed, “as an up-to-date, accurate source of media industry rates, trends and audience demographics for multiple types of media.” The book is divided into sections such as broadcast television, syndicated television, cable television, radio, promotion media, and more. Each section gives you rates and other marketing information.

Electronic Catalog

All reference materials in the McLeod Business Library are listed on the Earl Gregg Swem Library electronic catalog (http://lion.wm.edu/uhltbin/webcat).

To find books held by the Business Library, narrow your search while using the Library Catalog by selecting Business (PRC) from the Library data field on the search page. This will ensure that only materials held in the Business Library are searched and displayed on the results page.

Updated books in the Business Library


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