

What is the Investment Screener?

The investment screener allows advisors to search and/or filter for an individual investment or a group of investments which meet a defined criterion across multiple filters adapted to each investment type. The results are displayed in a grid table. Data includes however is not limited to Price information, Portfolio, Performance, Operational and Risk Analysis. Users can also access additional tools from the Investment Screener to further research and evaluate investments such as the Morningstar Portfolio X-Ray™, Advanced Interactive chart and the Investment Compare tool by selecting the investments using the check box option and then the appropriate action icon displayed at the top of the grid table to view the investment(s) in the selected tool.

Search or filter investments

1

2 Fund provider

2 IA Sector

Morningstar rating™

On-going charge (%)

Management style

Fund size (mil/bn)

Yield (%)

Geographical regions

Reset filters

Review and analyze your search results

3 Overview Short Term Performance Long Term Performance Fees Portfolio Risk

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5 <input type="checkbox"/>	3							
Name	Last close price	Yield(%)	On-going charge(%)	Morningstar category	Morningstar analyst rating™	Morningstar rating™	Morningstar sustainability rating™	
<input type="checkbox"/> 20UGS (UCITS) Funds Fiera Global Equity Class A CHF accumulation	127.66 CHF	0.00	–	Other Equity	–	–	🌱🌱🌱	
<input type="checkbox"/> 20UGS (UCITS) Funds Fiera Global Equity Class A EUR accumulation	128.80 EUR	0.00	1.63	Other Equity	–	–	🌱🌱🌱	
<input type="checkbox"/> 20UGS (UCITS) Funds Fiera Global Equity Class A GBP accumulation	130.77 GBP	0.00	–	Other Equity	–	–	🌱🌱🌱	
<input type="checkbox"/> 20UGS (UCITS) Funds Fiera Global Equity Class A USD accumulation	134.92 USD	0.00	1.84	Global Large-Cap Blend Equity	–	–	🌱🌱🌱	
<input type="checkbox"/> 20UGS (UCITS) Funds Fiera Global Equity Class P USD distribution	132.87 USD	0.00	2.45	Global Large-Cap Blend Equity	–	–	🌱🌱🌱	
<input type="checkbox"/> 20UGS (UCITS) Funds TCW Unconstrained Plus Bond Strategy A USD	110.32 USD	0.00	1.30	USD Flexible Bond	–	★★★	–	
<input type="checkbox"/> 7IM AAP Adventurous Fund A Acc	174.45 GBX	0.77	1.19	GBP Adventurous Allocation	–	★★	–	
<input type="checkbox"/> 7IM AAP Adventurous Fund A Inc	159.86 GBX	0.78	1.19	GBP Adventurous Allocation	–	★★	–	
<input type="checkbox"/> 7IM AAP Adventurous Fund C Acc	183.31 GBX	1.24	0.69	GBP Adventurous Allocation	–	★★★	–	
<input type="checkbox"/> 7IM AAP Adventurous Fund C Inc	180.13 GBX	1.26	0.69	GBP Adventurous Allocation	–	★★★	–	

Displaying 1 - 10 of 53773 results Show results

Morningstar Investment Screener

1. Predictive Search

Use the predictive search field to identify investments that match your criterion.

2. Investment Filters

The investment filters are tailored to the specific investment types the user is researching and can be used to screen down a universe to a user's specific needs and requirements. Once selecting an option from one of the many filters available, the results dynamically display within the grid table view. Select the 'reset filters' options to start a new filter search. Select the 'Show more' option to view additional filters.

3. Data View Tabs

This is a great way to view operational, performance, portfolio and risk and rating data across a range of investments. Each data section has been categorised into tab views and each tab view has a selection of data columns associated with that main data section. Some of the columns are sortable, select the column heading.

4. Action Icons

Additional tools available to assist in further researching and evaluating your investment(s). Select your investments using the 'add to' selection options to the left of each investment and then select the appropriate action icon to view your investments in the Morningstar Portfolio X-Ray or directly to the advanced interactive chart.

Morningstar Portfolio X-Ray™

Select up to 10 investments, apply weightings and review them in the Morningstar Portfolio X-Ray™, this will help you understand at-a-glance the basic characteristics of a portfolio including its asset allocation, exposure to different investment styles, geographic regions and sectors.

Advanced Interactive Chart

Select up to 7 investments and review them in the advanced interactive chart. The interactive chart has the capability to analyse an investments price movement (both intra-day and full history), performance growth, technical indicators fundamental ratios, coupled with drawings and other data points.

Investment Compare

Morningstar Investment Screener

Select up to 5 investments and review them in the investment compare. The investment compare provides a side by side illustration across several factors including asset allocations, regional and sector exposure, investment style, and top holdings.

Export to Excel

Export:

- all investments
- across all data tab views
- *all column views within each data tab option*

into an excel spreadsheet format.

5. Add to Selection options

Use the 'Add to' option to select investments to add to other tools available within the action icon list – see point 3.

6. Add to My List

Create a customised list within your personal view of up to 100 holdings. Use the 'add to' selection options next to your investment(s), select the arrow icon and 'Add to My List'. To view your list, select the arrow icon and 'View My List'. The list is only available for as long as you are active and in the Investment Screener view, once you close the browser or set away from your terminal for a long period of time the list will no longer be available.