



Invest in your Financial Future: Financial Tools at the Library

<https://www.wellesleyfreelibrary.org/research/businessresources/>

In today's workshop we will review the investment and financial tools available through the Wellesley Free Library, primarily focusing on Morningstar and Value Line. However, a full list of financial resources will be available.

Accessing Financial Tools Through the Website:

- www.wellesleyfreelibrary.org
- Click on E-LIBRARY
- Click on 'Databases A to Z' or 'Databases by Subject'

Morningstar Library Edition:

The library subscribes to Morningstar Investment Research Center, which offers real-time access to comprehensive data and independent analysis on thousands of investments, spanning mutual funds, stocks, exchange-traded funds, and closed-end funds.

This database is accessible in the library and remotely, which requires your library card number. Morningstar monthly print publications are also for in-library use on the second floor investment table, including:

- Dividend Investor
- ETF Investor
- Fund Investor
- Stock Investor

Some additional tips to remember when using the Morningstar Database:

- The Database's Portfolio X-Ray tool is unique and very useful for helping you develop a better picture of your portfolio's health.
- Morningstar is best used for helping you pick stocks and funds which match specific investing criteria.
- Other tools can give you a quick snapshot (1 page PDF) of a stock or fund: Enter the ticker or security name, then click "PDF Report".
- Morningstar includes excellent Help and Education Screens.

Value Line

- Value Line provides stock and industry lookup, custom company reports, model and custom user portfolios, historical archives, stock recaps, market review and PDF reports for printing and emailing.
- This database is accessible in the library and remotely, which requires your library card number. Value Line print publications are also for in-library use on the second floor investment table, including:
 - Value Line Investment Survey
 - This advisory service provides weekly summaries and quarterly reports on more than 1,700 stocks including ratings, charts, tables and analysis.
 - Value Line Investment Survey Selection & Opinion
 - Value Line Investment Survey Small and Mid-Cap Edition
 - Adds about 1,700 more stocks to the basic Value Line service including many NASDAQ issues and smaller NYSE and ASE securities.
 - Value Line Fund Investor
 - Provides advisory services offers full reports on over 800 individual mutual funds and portfolios.
- Some additional tips to remember when using the Value Line online:
 - Use the top search bar to find analysis on a specific company or stock. Within the company's record in-depth analysis, charts, etc. can be located.
 - The Investment Education tab offers a variety of educational resources including a glossary and tool guides for using the Value Line database.
 - To access the traditional or older version of Value Line:
 - Click on Dashboard.
 - In the right-hand sidebar click on the links within the 'Traditional Access' box.
 - 'Find Ideas' includes:
 - Stock Screener
 - Model Portfolio
 - Portfolio Tracker
 - Special Situations service – monthly report
 - 'Markets' includes:
 - Daily Updates – Stock market Today
 - Economic Calendar – Dates of important events
 - Featured Commentaries – Market commentaries, stock highlights, industry analysis and analyst ideas.
 - Industries – Analysis by specific industry (i.e. Steel, ecommerce, etc.)