


Small Talk

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Screening For Small Company ETFs Using Morningstar

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- Know what you own,
- know how it works,
- and why you own it.

Peter Lynch




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Why use an ETF for small companies?

Pros




- Puts small companies in your portfolio
- May fill a niche that is missing in your portfolio
- May avoid large losses from volatility with small companies
- Reduces / eliminates the time to research and follow a small company

Cons



- You depend on the managers of the ETF to perform
- May miss out on opportunities of individual stocks
- Need to research the ETF, not a company
- May not give you the performance you expect from holding a small company



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Screening for
Exchange Traded Funds

- Use screening to focus your search in selecting possible candidates
- [Morningstar](#)
 - ❖ Set your own criteria – You need to know what you are looking for in an ETF

Primary selections are:

Fund Group

Morningstar Category

Expense Ratio

- ❖ May refine your search using Views

ETF.com

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Morningstar ETF Screener

MORNINGSTAR

Screener

Category

★ Fund Group:

All

★ Morningstar Category:

Any

Expense Ratio:

Any

Fund Family

Any

Performance History

YTD Return:

Any

1-year Return:

Any

3-year Return:

Any

5-year Return:

Any

ETFs that Pass Screen:

2711 Update

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ETF Screening options

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Fund Group

Morningstar Category

Expense Ratio ★

All

U.S. Equity ★

Sector Equity

International Equity

Taxable Bond

Money Market

Municipal Bond

Allocation

Alternative

Commodities

Any

Large Value

Large Blend

Large Growth

Leveraged Not Long

Mid-Cap Value

Mid-Cap Blend

Mid-Cap Growth

Small Value

Small Blend

Small Growth ★

Communications

Consumer Cyclical

Consumer Defensive

Energy Limited Partnership

Equity Precious Metals

Financial

Global Real Estate

Health

Any

Less than or equal to 0.20%

Less than or equal to 0.30%

Less than or equal to 0.40%

Less than or equal to 0.50%

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Selected View items –
more items to narrow your search

MORNINGSTAR

View	Items to consider
Nuts and Bolts	Fund Inception Date Expense Ratio (%)
Portfolio	Turnover % % Assets in Top 10 Holdings
Risk & Tax Data	3-year Tax Ratio (%) 5-year Tax Ratio (%)
Performance	NAV 5-year Return (%) NAV 3-year Return (%) ★ Market 5-year Return (%) ★ Market 3-year Return (%)
Snapshot	Expense Ratio (%)

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Live Demonstration

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Questions





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Canada Goose Holdings, Inc. (GOOS)
<http://www.canadagoose.com/>



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