



# Tuesday's Tip

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## Morningstar Investment Research Center

April 23, 2019

The Morningstar Investment Research Center database includes comprehensive financial information and analysts' opinions to help you make investing decisions for stocks, mutual funds, Exchange-Traded Funds (ETFs) and industries. The database also allows you to access their Portfolio X-ray to determine what your asset mix should be and to take workshops and classes to develop your investing skills.

**MORNINGSTAR** Investment Research Center™  
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    % Portfolio X-Ray  
    % Retirement Cost Calculator  
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Enter a ticker symbol or name in the search box and it will go directly to the report. Or if you click the Analyst Reports of each category it goes to a list of stock, fund or ETF reports.



**Investment Research Center<sup>SM</sup>**  
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End Session

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## Fidelity® OTC FOCPX | ★★★★★

FF Fund Family Data PDF Report

Quote
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Expense
Tax
Purchase
Filings

**NAV** 1-Day Total Return

**\$12.12** ↑0.17%

USD | NAV as of 17 Apr 2019 | 1-Day Return as of 17 Apr 2019

**TTM Yield** Load

0.00% None

**Total Assets** Expenses

\$ 19.0 bil 0.88%

**Fee Level** Turnover

Average 38%

**Status** Min. Inv.

Open \$ --

**30-Day SEC Yield**

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**Category**

Large Growth

**Investment Style**


Large Growth

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### Growth of 10K FOCPX More...

04/18/2009 - 04/17/2019    Zoom: 1M 3M YTD 1Y 3Y 5Y 10Y Maximum Custom

— XNAS:FOCPX:60,247.29USD    — Large Growth:39,515.46USD    — S&P 500 TR USD:41,122.86USD



### Morningstar Risk Measures FOCPX More...

**Risk vs. Category\*** (1,256) High

**Return vs. Category\*** (1,256) High

\*10 Year Ranking    Low    Avg    High

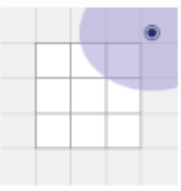
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### Morningstar's Take FOCPX More...

Fidelity OTC has a new lead manager with limited experience running a diversified portfolio. The fund receives a Morningstar Analyst Rating of Neutral. Chris Lin became lead manager...

[Read full Analyst Report](#)

### Style Map FOCPX More...



● Weighted Average of holdings  
● 75% of fund's stock holdings


Deep Core Val Core Val Core Grw High Grw

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### Morningstar Sustainability FOCPX More...

Morningstar Sustainability Rating    Global Category

### Asset Allocation FOCPX More...



Cash	0.00%
US Stock	88.82%
Non US Stock	7.88%
Bond	0.00%
Other	3.30%

As of 02/28/2019

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**Stewardship Grade**

**Morningstar Pillars**

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**4** Markets: Get return information on various investment indexes, types, sectors, and styles.

**5** Portfolio: Access Tools. Test drive our robust yet easy-to-use portfolio tools and calculators to determine what your asset mix should be, how your investments are working together, and more.

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	4. Markets highlights index, sector, industry, and fund category returns as well as downloadable monthly market outlook reports written by our team of analysts.	5. Portfolio provides access to a comprehensive suite of portfolio-planning tools and guidance, such as Portfolio X-Ray which interprets your asset allocation and compares your holdings to industry standards.	6. Articles & Videos features insightful investing articles and videos, as well as daily market commentary, written and recorded by our analysts, editors, and outside market leaders.

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