
Morningstar® Hypothetical Investment Growth Chart Quick Start Guide

Key Features

- ▶ View an investment's performance over a specified period of time
- ▶ Compare a mutual fund against a benchmark index
- ▶ Modify the time period easily by using the dropdown menu at the top or entering a specific date range
- ▶ Focus on a specific snapshot of time by adjusting the slider bar at the bottom

Support

For functionality or methodology questions regarding the Hypothetical Investment Growth Chart, please [Contact Us](#) via our web site.

This Quick Start Guide is designed to introduce you to the Morningstar® Hypothetical Investment Growth Chart. Using step-by-step instructions and illustrations, it will walk you through the tool to get you up and running quickly. This guide will tell you how to effectively input the products of your choice, view an onscreen portrayal of the investments' performance over a specified period of time.

The Hypothetical Investment Growth Chart is a powerful tool that allows you to view a fund's historical performance in relation to a benchmark. Use this tool to perform in-depth research on a particular fund without leaving the Products section of the site, allowing you to find the information needed to make investment decisions without interruption.

Unregistered Users and Registered Individual Investors

- 1 View the historical performance of a Federated fund compared to a benchmark.
- 2 Change the investment amount by entering a custom value within the **Amount (\$)** input field in the upper left-hand corner.
- 3 Modify the time period of the graph by doing the following:
 - ▶ Selecting trailing 1y, 3y, 5y, 10-y, since inception, earliest available, or earliest common at the top of the graph.
 - ▶ Entering a custom date range in the upper left-hand corner, after selecting **Custom** from the drop down menu.
- 4 Zoom in on a specific snapshot of time by using the slider feature at the bottom of the graph.

View an onscreen portrayal of a Federated security's historical performance



Frequently Asked Questions

How can I modify the time period?

Modify the time period of the graph by doing the following:

- ▶ Selecting trailing 1y, 3y, 5y, 10-y, since inception, earliest available, or earliest common at the top of the graph.
- ▶ Entering a custom date range in the upper left-hand corner, after selecting **Custom** from the drop down menu.

What is the purpose of the slider feature at the bottom of the graph?

The slider feature allows you to zoom in on a specific snapshot of time. And based on the time you specify, the slider will include year and month.

What dollar amount range can I enter?

Users must enter a minimum of \$1. However, there is no maximum dollar limit.

Who do I contact if I need support?

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