


<http://www.bus.umich.edu/KresgeLibrary/>

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 -  AIM: [kresgelibraryIM](aim:kresgelibraryIM)
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 - ✓ NEED HELP? Section
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 - ✓ Kresge Dash Podcasts
 - ✓ Instruction Session Handouts
 - ✓ Find it Fast- frequently asked research questions
 - ✓ By Topic Marketing Page
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Financial Databases

Primary Databases:

- 10K Wizard
- Global Financial Data
- Mergent Online
- Zephyr
- Valueline
- InvesttextPlus (through Thomson Research)

Why Use 10K Wizard?

- ✓ Search for current and historical SEC Filings

Why Use Global Financial Data?

- ✓ Research historical and current economic and financial data series
- ✓ Exchange rates, historical stocks, sector indices and more
- ✓ Data from over 200 countries

Why Use Investext (now available through Thomson Research)

- ✓ Financial analyst reports on stocks from 800+ brokerage firms

Why Use Mergent Online?

- ✓ Historic and current company financials
- ✓ Download financials into Excel
- ✓ Industry reports

Why Use Zephyr?

- ✓ Information about M&A, IPO, and venture and joint venture deals
- ✓ 100,000 new deals added each year,
- ✓ National--back to 1997; International--back 5 years.

Why Use Valueline?

- ✓ Analysis, rating, and forecast of 1,700 stocks and mutual funds

10-K Wizard

Why use 10-K Wizard?

Use **10-K Wizard** to easily search, print and download U.S. SEC Filings. You can search the contents of the EDGAR reports (from 1993/1994 to present), which are available full text in the database. Use Advanced Tab to search for companies that match various parameters or combinations of parameters, such as:

- ✓ Industry categories
 - ✓ Geographic designations (worldwide)
 - ✓ Particular SEC forms
 - ✓ Particular stock exchange
- Use the **10-K Items** tab to search within a section of the 10-K report. (see graphic)
 - Use the **Exhibits** tab to find specific exhibits that discuss a desired topic. Exhibits appear in various SEC filings. This part of the database covers 1994 to present.
 - Search the **8-K Search** tab (Corporate Action) for reporting of “unscheduled events.”
 - Search the **Profile** tab to search a database of over 19,000 company profiles.
 - Search the **Insider** tab for search and list current and historical insider trading reports (such as Forms 3-5). Full text is available from 2003 to present.
 - Search the **Financials** tab to retrieve current and historical financial data quickly

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10k WIZARD®
SEE POWER SEARCH

[10-K Blog](#) | [Home](#) | [Recent Filings](#) | [My Services](#) | [References](#) | [Cli](#)

UPDATE : New Regulatory Database - Sept 24, 2008

| |
|------------------------|
| Advanced |
| Exhibits |
| Basic |
| 10-K Items |
| 8-K Search |
| Profile |
| Insider |
| Global Reports |
| SEC News Digest |
| SEC Comments |
| SEC NO Action |
| SC13 D/G |
| Financials |

10-K Items Search

Ticker OR CIK OR

File-Number OR Accession-Number

Word Search

Accelerated Status :

10K Sections (click to view/select an item)

10K Part I

Global Financial Data

Why use Global Financial Data?

- This source gives extensive historical and current data for economic and financial categories, arranged by country.
- For a quick search, use the parameters shown, as needed:
 - ✓ Search term
 - ✓ Stock symbol
 - ✓ Data series type
 - ✓ Country
- You can also search by selecting a country or category. If you want a particular series for many countries, it's faster to search by category.

Gfd GLOBAL financial data *Financial and Economic Data Specialists*
Offering Comprehensive Current and Historical Perspectives

Welcome, University of Michigan My Home

PRODUCTS SERVICES ACCESS CUSTOMER SUPPORT RESEARCH

University of Michigan's Home Page

Welcome AutoTrac Worksheet Access AutoTrac Queue

Welcome to Our New Web Site - Wed, 23 Apr 2008 09:41:48 -0700

The University's access to Global Financial Data is for Academic Purposes Only. Use of the database for non-academic purposes is a violation of the University's license. If you would like to obtain business access to the database, please feel free to contact Global Financial Data's Sales Department.

Global Financial Data will be exhibiting at the 61st Annual CFA Conference in Vancouver between May 11 and May 14. We will be providing open access to the database so you can check out the U.S. Stocks Database, Real Estate Database and GFDDatabase. We will be in Booth 415, so drop by and visit us. We look forward to seeing you.

Welcome to the new version of Global Financial Data's website. We have added many new features to our website that will enable you to access more data and access it more easily.

Among the new features are access to fundamental data for individual stocks, including Balance Sheet, Income Statement, Cash Flow data and Financial Ratios.

We have added the AutoTrac Worksheet which will enable you to quickly access data from multiple files in Excel and save your preferences for quick access in the future.

GFD File Search
Ticker [v]
Ticker/CIK/CUSIP/SIC/NAICS Search:
[]
Search

GFD Search Engine
File Name Search:
[]
Keyword Search:
[]
Search GFDDatabase
Search Stocks

GFD Filter Search
GFDDatabase [v]
Data Series Type: [v]
Any Series Type [v]
Country: [v]
All Countries [v]
Search

GFD Category Search
Series Type [v] Country [v]

Search GFDDatabase
Search Stocks

Global Financial Database : Database Categories Country

GFD Filter Search
GFDDatabase [v]
Data Series Type: [v]
Any Series Type [v]
Country: [v]
All Countries [v]
Search

GFD Category Search
Series Type [v] Country [v]

GFD Descriptions
GFDDatabase
US Stocks Database
Real Estate Database
These three databases are interlinked and reinforce each other. Economic, financial and fixed income markets influence and respond to each other.

- Annual Files
- Bond Indices
- Central Bank Interest Rates
- Commercial Paper Yields
- Commodity Indices
- Commodity Prices
- Consumer Price Indices
- Corporate Bond Yields
- Deposit Rates
- Exchange Rates
- Futures Contracts
- Government Bond Yields
- Gross Domestic Product
- Historical Stocks
- Interbank Interest Rates
- Interest Rate Swaps
- Intraday Data
- Lending Rates
- Overnight and Call Money Rates
- Population
- Real Estate Market Data
- Sector Indices-Consumer Discretionary
- Sector Indices-Consumer Staples
- Sector Indices-Finance
- Sector Indices-Health Care
- Sector Indices-Industrials
- Sector Indices-Information Technology
- Sector Indices-Materials
- Sector Indices-Telecommunications
- Sector Indices-Transports
- Sector Indices-Utilities
- Stock Indices - Preferred Stocks
- Stock Indices-Composites
- Stock Indices-Size and Style
- Stock Market - AMEX
- Stock Market - NASDAQ
- Stock Market - NYSE
- Stock Market - OTC
- Stocks-Capitalization, Volume
- Stocks-Dividend Yields and P/E Ratios
- Stocks-Technical Indicators
- Total Return Indices-Bills
- Total Return Indices-Bonds
- Total Return Indices-Stocks
- Treasury Bill Yields
- Unemployment Rates

- Choose from the resulting available series (may vary).
- The results screen lists the date ranges and data frequencies that you can choose from.
- Click on the **Download Excel** button when viewing a series to download it to excel. To download multiple series add the series to the **AutoTrac Queue**.
- Then go to the homepage and click on the **AutoTrac Queue** tab. Then click on **Download Your Files**.

Why use Mergent Online?

- This database features current and historical financial information on 15,000 U.S. and 20,000 foreign companies. It contains some information not easily found elsewhere.
- Use **Basic Search** to get access to basic information and useful links. In a typical record, note especially links to:
 - ✓ History
 - ✓ Joint Ventures
 - ✓ Property
 - ✓ Subsidiaries

Mergent Online
Friday, October 26, 2007 3:24:40 PM

Search > Search Results > **Company Details**

PepsiCo Inc. (NYS: PEP)

Company Analysis List (0) (expand)

Company Details | Equity Pricing | Company Financials | Create Reports | EDGAR | News | Annual Reports | Research | Competitors | Portraits | TearSheets | Industry Reports

Synopsis | Highlights | History | Joint Ventures | Business | Property | Subsidiaries | Long Term Debt | Executives | Capital Stock

PepsiCo Inc.
700 Anderson Hill Road
Purchase, NY 10577-1444 United States
Region: Middle Atlantic
Phone: 914 253-2000
Fax: 914 253-2070

Incorporated: Sep. 1919, DE, United States
Re-incorporated: Dec. 1986, NC, United States

Number of Employees: 168,000
(Approximate Full-Time as of 12/30/2006)

Country: United States

Ticker: PEP

CIK: 0000077476

Cusip: 713448108

IRS Number: 131584302

Mergent Industry Code: 4.1 - Food

Business Summary

PepsiCo is engaged in manufacturing, marketing and selling a range of salty, sweet and grain-based snacks, carbonated and non-carbonated beverages and foods. Co. is organized into four divisions: Frito-Lay North America (FLNA); PepsiCo Beverages North America (PBNA); PepsiCo International (PI); and Quaker Foods North America (QFNA). FLNA branded snacks include Lay's potato chips, Doritos tortilla chips and Rold Gold pretzels. PBNA's brands include Pepsi, Mountain Dew, Gatorade, Tropicana Pure Premium, and Lipton. PI's brands include Lay's, Walkers, Cheetos, Doritos, Ruffles, Gamesa and Sabritas. QFNA's brands include Quaker oatmeal, Rice-A-Roni and Near East side dishes.

Financial Highlights (In USD as of 12/30/2006)

| | |
|----------------------|----------------|
| Total Revenue | 35,137,000,000 |
| EBITDA | 8,399,000,000 |
| Operating Income | 6,439,000,000 |
| Net Income | 5,642,000,000 |
| Total Assets | 29,930,000,000 |
| Current Assets | 9,130,000,000 |
| Total Liabilities | 14,562,000,000 |
| Current Liabilities | 6,860,000,000 |
| Long Term Debt | 2,550,000,000 |
| Stockholders' Equity | 15,447,000,000 |

Custom Report List
to Custom Reporting List
Remove Report

- **Industry Reports** on major industry groups cover major world regions for the years 2003 to date.

MERGENT Online
Friday, October 26, 2007 3:39:41 PM

Log out | Administration | Contact Us | Help

Search

Basic Search | **Advanced Search** | Executive Search | EDGAR Search | **Industry Reports** | Equity Reports

Company Analysis List (0) (expand)

Select Industry: Biotechnology | Select Region: Asia Pacific | Search

Select Date Range: Jan 2003 to Dec 2007

| Date | Report Name | Region | | |
|----------|---------------|--------------|------|----------|
| Jun 2004 | Biotech | Asia Pacific | View | Download |
| Dec 2003 | Biotech | Asia Pacific | View | Download |
| Jul 2003 | Biotech | Asia Pacific | View | Download |
| Jun 2007 | Biotechnology | Asia Pacific | View | Download |
| Dec 2006 | Biotechnology | Asia Pacific | View | Download |
| Jun 2006 | Biotechnology | Asia Pacific | View | Download |
| Dec 2005 | Biotechnology | Asia Pacific | View | Download |
| Jun 2005 | Biotechnology | Asia Pacific | View | Download |
| Dec 2004 | Biotechnology | Asia Pacific | View | Download |

Country Profile
Looking for country Statistical Data with Country Map?
Select a country from the list:
Select a Country

Copyright © 2005 Mergent | Privacy Policy | Service Level | Feedback

Zephyr

Why use Zephyr?

- M&A, IPOs, venture capital, joint venture deals
- National and international
- Quick and advanced search
- Deal analysis and league tables

Quick Deal Search

Company name: Search on whole words only

Company search restricted to: Acquiror Target Vendor Equity

Time Period: Last 3 years From to

Include deals last updated in this time period.

Deal status: (Any) | Announced | Completed | Pending - awaiting regulating approval

Deal type: Acquisition(DT) Or Merger(DT)

Activity: ussic(2834)

Activity search restricted to: Acquiror Target

Example: Mergers and Acquisitions of pharmaceutical companies by Indian co's

| Target name | country code | Rumour date | Date announced | Deal type |
|---|--------------|-------------|----------------|-------------------|
| Quest International India Ltd | IN | 1/08/2004 | 26/05/2006 | Acquisition incr |
| Doctors Organic Chemical Ltd | IN | 17/06/2005 | 27/06/2005 | Acquisition 51% |
| Nihon Pharmaceutical Industry Ltd | JP | 25/08/2005 | 11/11/2005 | Acquisition incr |
| Torrent Gujarat Biotech Ltd's manufacturing facility at Masar | IN | 13/10/2005 | 13/10/2005 | Acquisition 100% |
| Betapharm Arzneimittel GmbH | DE | 2/11/2005 | 16/02/2006 | Acquisition 100% |
| Avecia Pharmaceuticals Ltd | GB | 27/10/2005 | 27/10/2005 | Acquisition 100% |
| Roche's Mexican active pharmaceutical ingredient business | MX | 8/11/2005 | 8/11/2005 | Acquisition 100% |
| Unnamed drug dossier development company in Germany | DE | 9/02/2006 | | Acquisition 100% |
| Manga Capsules Ltd | IN | 10/02/2006 | | Acquisition 64.0% |
| Terapia SA | RO | 13/03/2006 | 29/03/2006 | Acquisition 96.3% |
| Unspecified Latin American contract research firm | | 21/02/2006 | 21/02/2006 | Acquisition 100% |
| - | | 10/04/2006 | | Acquisition |
| - | | 22/04/2006 | | Acquisition |
| Elixir Chemicals Pvt Ltd | IN | 20/04/2006 | 20/04/2006 | Acquisition 100% |
| Amcis AG | CH | 12/05/2006 | 24/05/2006 | Acquisition |
| Pinewood Laboratories Ltd | IE | 28/05/2006 | 3/10/2006 | Acquisition 100% |
| Khimiko-Farmatsevticheskii Kombinat Akrikhin OAO | RU | 16/06/2006 | 21/08/2006 | Acquisition 100% |
| Matrix Laboratories Ltd | IN | 21/06/2006 | 29/08/2006 | Acquisition incr |
| Drug Houses of Australia (Asia) Pvt Ltd | SG | 1/09/2006 | 1/09/2006 | Acquisition 100% |
| James Robinson Ltd | GB | 2/09/2006 | 11/02/2008 | Acquisition 100% |
| - | | 6/09/2006 | | Acquisition |

Valueline

Why use Valueline?

- Investment survey
- Stock analysis
- Top 100 stocks
- Industry analysis
- Stock screening

The screenshot shows the Value Line website interface. At the top, there is a navigation menu with links: Home, My Value Line, Education, Products & Services, About Value Line, Support, and Site Map. Below the navigation, there is a search bar and a "Welcome" message with links for "Index", "My Account", and "Log off". The main content area is titled "The Value Line Investment Survey - Standard" and features a search form. The form has a text input field containing "KO", a "Search By" dropdown menu with radio buttons for "Company" and "Industry", and a "Search" button. Below the search form, there is a section for "Search Results (0)". On the left side of the page, there is a sidebar menu with the following items: Investment Survey, Description, Survey Issues, Lookup Industry, Lookup Company, Rank Changes, Supplementary Reports, Stock Screening, Custom Report, and Model Portfolios.

Investext (In Thomson Research)

Investext (now in Thomson Research)

- Financial analyst reports from 800 brokers
- Up to date within weeks
- Search for broker of your choice
- SEC documents available
- Search SEC documents

[COCA COLA CO - KO](#)

| Filings | Research Reports | | | | | | | | | | | | | | | | | | |
|--|------------------------------|------------|------------------------------------|------------|-------------------------------|------------|--------------------------------------|------------|---------------------------------------|------------|-------------------------------|------------|--------------------------------------|------------|---------------------------------------|------------|-------------------------------|------------|---|
| <p>Most Online Filings</p> <table border="1"> <tr><td>Registration</td><td>12/31/2007</td></tr> <tr><td>Annual Report U.S.</td><td>06/27/2008</td></tr> <tr><td>Annual Report</td><td>04/25/2008</td></tr> <tr><td>Quarterly Financials</td><td>04/16/2008</td></tr> <tr><td>Investor Presentation</td><td>12/31/2007</td></tr> <tr><td>Annual Report</td><td>12/14/2007</td></tr> <tr><td>Quarterly Financials</td><td>09/05/2008</td></tr> <tr><td>Investor Presentation</td><td>12/13/2007</td></tr> <tr><td>Annual Report</td><td>12/14/2007</td></tr> </table> <p>Complete Filings History SEC Full Text Search</p> | Registration | 12/31/2007 | Annual Report U.S. | 06/27/2008 | Annual Report | 04/25/2008 | Quarterly Financials | 04/16/2008 | Investor Presentation | 12/31/2007 | Annual Report | 12/14/2007 | Quarterly Financials | 09/05/2008 | Investor Presentation | 12/13/2007 | Annual Report | 12/14/2007 | <p>Morning Meeting Notes Investext Research Reports Complete Reports List</p> <p>Latest Investext Citations</p> <p>VALUENGINE, INC. (13 pgs) DATAMONITOR - COMPANY RESEARCH (2) DATAMONITOR - COMPANY RESEARCH (2)</p> <p style="text-align: center;">Spreadsheet Financial</p> <p>SEC 10-K (Most Recent) SEC 10-Q (Most Recent) SEC 10-K History (10-Year) SEC 10-Q History (10-Year)</p> |
| Registration | 12/31/2007 | | | | | | | | | | | | | | | | | | |
| Annual Report U.S. | 06/27/2008 | | | | | | | | | | | | | | | | | | |
| Annual Report | 04/25/2008 | | | | | | | | | | | | | | | | | | |
| Quarterly Financials | 04/16/2008 | | | | | | | | | | | | | | | | | | |
| Investor Presentation | 12/31/2007 | | | | | | | | | | | | | | | | | | |
| Annual Report | 12/14/2007 | | | | | | | | | | | | | | | | | | |
| Quarterly Financials | 09/05/2008 | | | | | | | | | | | | | | | | | | |
| Investor Presentation | 12/13/2007 | | | | | | | | | | | | | | | | | | |
| Annual Report | 12/14/2007 | | | | | | | | | | | | | | | | | | |

Tozzi Finance Center Databases

- Bloomberg
- FactSet

Contact kpetaine@umich.edu (Kai Petainen, Manager)