

Downloading International Data

by Kai Petainen, Tozzi Finance Center Manager – October 2008 – kpetaine@umich.edu

NOTE: DO NOT WAIT UNTIL THE LAST MOMENT TO GET THIS DATA!

1. Factset Data

- Load up **Factset**. If Factset does not load up, look in the bottom right of the screen. Find the Factset icon, right-click and click **'Exit Factset'**. There is a small bug in Factset that they are aware of.
- **EA2 – Economic Analysis**
 - i. Click on **'EA2'** on the left side of Factset.
 - ii. Click on the **'Charts'** tab., and the **magnifying glass**.
 - iii. Search for the data you are looking for. Note, you can narrow it down by country.
 - iv. It brings up a chart. Under **'View'**, change it to a table.
 - v. Download into Excel by clicking the **'Download'** (down arrow) in the Factset menu.
 - vi. Choose **'New Spreadsheet'**
- **CE – Company Explorer**
 - i. Click on **'CE'** on the left side of Factset
 - ii. Click **'Prices' – 'Price Chart'**
 - iii. Click the **'magnifying glass'**
 - iv. This can be used for equities, but you can also use it for **Indices, Yields, Treasuries**, etc.
 - v. For example... you can find the U.S. 3 month bill under **'Treasuries'**
 - vi. It brings up a chart, to copy the chart, right-click, **'Copy as Bitmap'** and paste it somewhere else.
 - vii. You can change the **'Number of Years'** at the top and **'View'** the data in a table.
 - viii. Download via the down arrow.

2. Bloomberg Data

- There are 3 **Bloomberg** terminals. 2 in Tozzi at the Econ/Strat and Energy PCs. 1 in Kresge.
- If you don't have a login, get one. To get a login, hit the **'CONN DFLT'** key and just hit enter. Answer the questions and put your cell phone number in. (they need to call you back)
- Login to Bloomberg.
- **Questions for Bloomberg? Hit the 'F1' key twice. This brings up a help/chat screen.**
 - i. If that screen does not come up, right-click on the screen and click on **'Terminal Defaults'**. Click on the **'General'** tab and make sure the **'Keyboard Type'** is **'Desktop1'**
- Use each of these commands and make a list of the 'tickers' that you'll need
 - i. **BTMM** – choose the country in the top left, left-click on an item and click description. Note the 'ticker' and whether it is a currency, index, etc.
 - ii. **MMR** – choose a country. Go through the menus. Note the ticker.
 - iii. **FRD** – choose the currencies. Note the ticker.
 - iv. **ECST** – choose a country. Go through the menus. Note the tickers.
- If you'd like me to download the data, email me kpetaine@umich.edu a list of the tickers and I'll try to get it to you within 48 hours (longer on weekends). **DO NOT DO THIS AT THE LAST MOMENT!** It is your responsibility.
- Load up Excel. Click **'Bloomberg' – 'Import Data'**.
- Choose **'Historical End of Day'**
- Type the ticker in the top left, but make sure the **'Market Sector'** indicates the correct type (eg. Index)
- Add the tickers in, and click **'Next'**
- Under **'Categories'**, select **'Last Price [PX_LAST]**, under **'Market Activity' – 'Last'**
- Click **'Next'**. Select the **'Date'** and the **'Periodicity'**. It is common to choose quarterly/monthly numbers.
- Click **'Next'**. Change things if you like. Click **'Next'**. Change things if you like. Click **'Finish'**
- If the data does not download, then check the ticker and the type. It might not be an index/equity?