





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

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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 Investtext (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.

- 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**.

Mergent Online

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)
to Company Analysis List

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*, *Garden of Eatin'* and *Santitas*. 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

Company Analysis List (0) (expand)

Search

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

Select Industry: Select Region:

Select Date Range: to

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:

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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
Announced
Completed
Pending - awaiting regulating approval

Deal type

Activity

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 for Home, My Value Line, Education, Products & Services, About Value Line, Support, and Site Map. Below the navigation, there is a search bar and a login section. The main content area is titled "The Value Line Investment Survey - Standard" and features a search form with the prompt "Enter the Ticker, Company or Industry Name:". The search form includes a text input field containing "KO", a "Search By" dropdown menu, and radio buttons for "Company" and "Industry". A "Search" button is located below the input field. Below the search form, there is a section for "Search Results (0)".

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> <p>12/31/2007</p> <p>06/27/2008</p> <p>04/25/2008</p> <p>04/16/2008</p> <p>12/31/2007</p> <p>12/14/2007</p> <p>09/05/2008</p> <p>12/13/2007</p> <p>12/14/2007</p>	<p>Research Reports</p> <p>Morning Meeting Notes</p> <p>Investext Research Reports</p> <p>Complete Reports List</p> <p>Latest Investext Citations</p> <p>VALUENGINE, INC. (13 pgs)</p> <p>DATAMONITOR - COMPANY RESEARCH (2</p> <p>DATAMONITOR - COMPANY RESEARCH (2</p>
<p>Spreadsheet Financials</p> <p>SEC 10-K (Most Recent)</p> <p>SEC 10-Q (Most Recent)</p> <p>SEC 10-K History (10-Year)</p> <p>SEC 10-Q History (10-Year)</p>	

Tozzi Finance Center Databases

- Bloomberg
- FactSet

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