

Kresge Business Library Instruction Overview: Selected Financial Databases

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

Library Assistance & News

- E-mail: kresge_library@umich.edu
- In person: Reference Desk (2nd floor)
 - ✓ Monday-Thursday 11:00am-7:00pm
 - ✓ Friday 11:00am-5:00pm
- Phone: 734.764.9464
- IM:



MSN Messenger:

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Yahoo!: kresge_library



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Google Talk:

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Web site:

www.bus.umich.edu/kresgelibrary

- ✓ NEED HELP? Section
- √ Kresge Library News RSS feeds
- √Kresge Dash Podcasts
- ✓ Instruction Session Handouts
- √ Find it Fast- frequently asked research
 questions
- √ By Topic Marketing Page
- √ Kresge Library Wiki

Financial Databases

Primary Databases:

- 10K Wizard
- Global Financial Data
- Mergent Online
- Zephyr
- Valueline
- InvestextPlus (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?

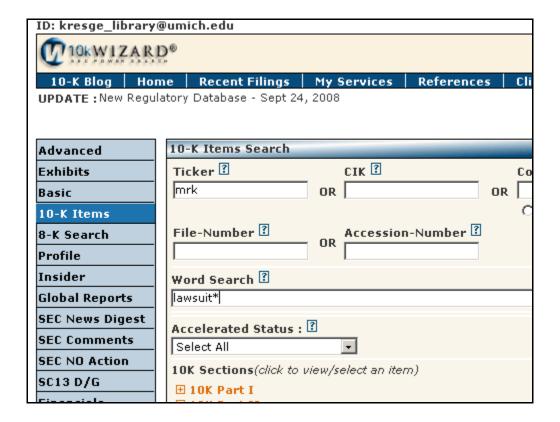
✓ Analysis, rating, and forecast of 1,700 stocks and mutual funds

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



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.

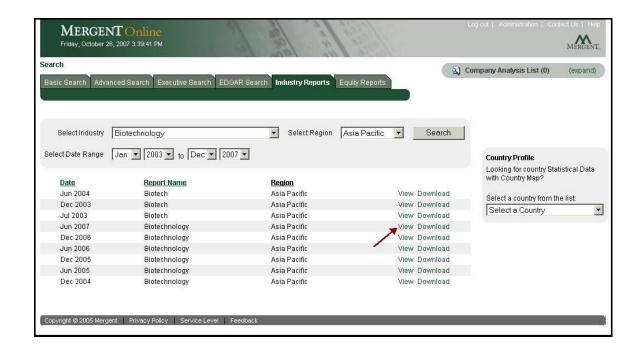
Mergent Online

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



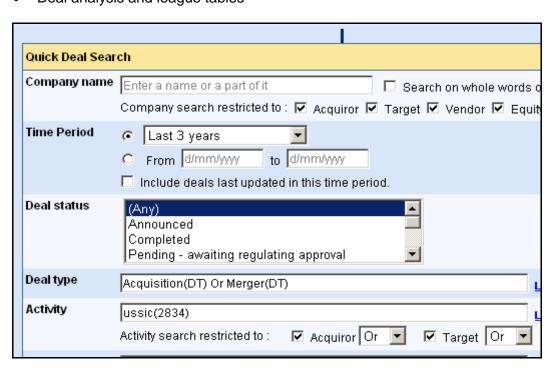
 Industry Reports on major industry groups cover major world regions for the years 2003 to date.



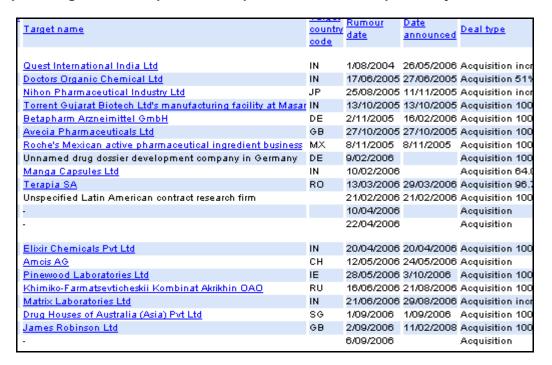
Zephyr

Why use Zephyr?

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



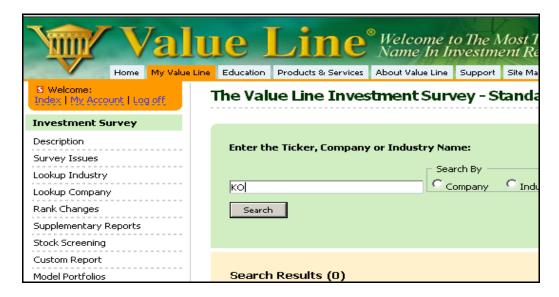
Example: Mergers and Acquisitions of pharmaceutical companies by Indian co's



Valueline

Why use Valueline?

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



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



Tozzi Finance Center Databases

- Bloomberg
- FactSet

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