

Research Insight

Introduction

- Research Insight is a database of company financial and market information provided by Standard and Poor's.
- It has two major components: Compustat North America and Global Vantage.
- Compustat North America is for North American companies and Global Vantage of for companies of other countries.

For details of the data items that these databases contain refer to file at Y:\Share\S&P Data and Open: **ResearchInsightDataItems 1-04.pdf** and **RI 8.0 NA items.pdf** for Compustat North America and **Globaldataitems.pdf** for Global Vantage data items.

To access the Research Insight database you have to use login ID of **tfguest** and password **tr@d1ng**.

Period References:

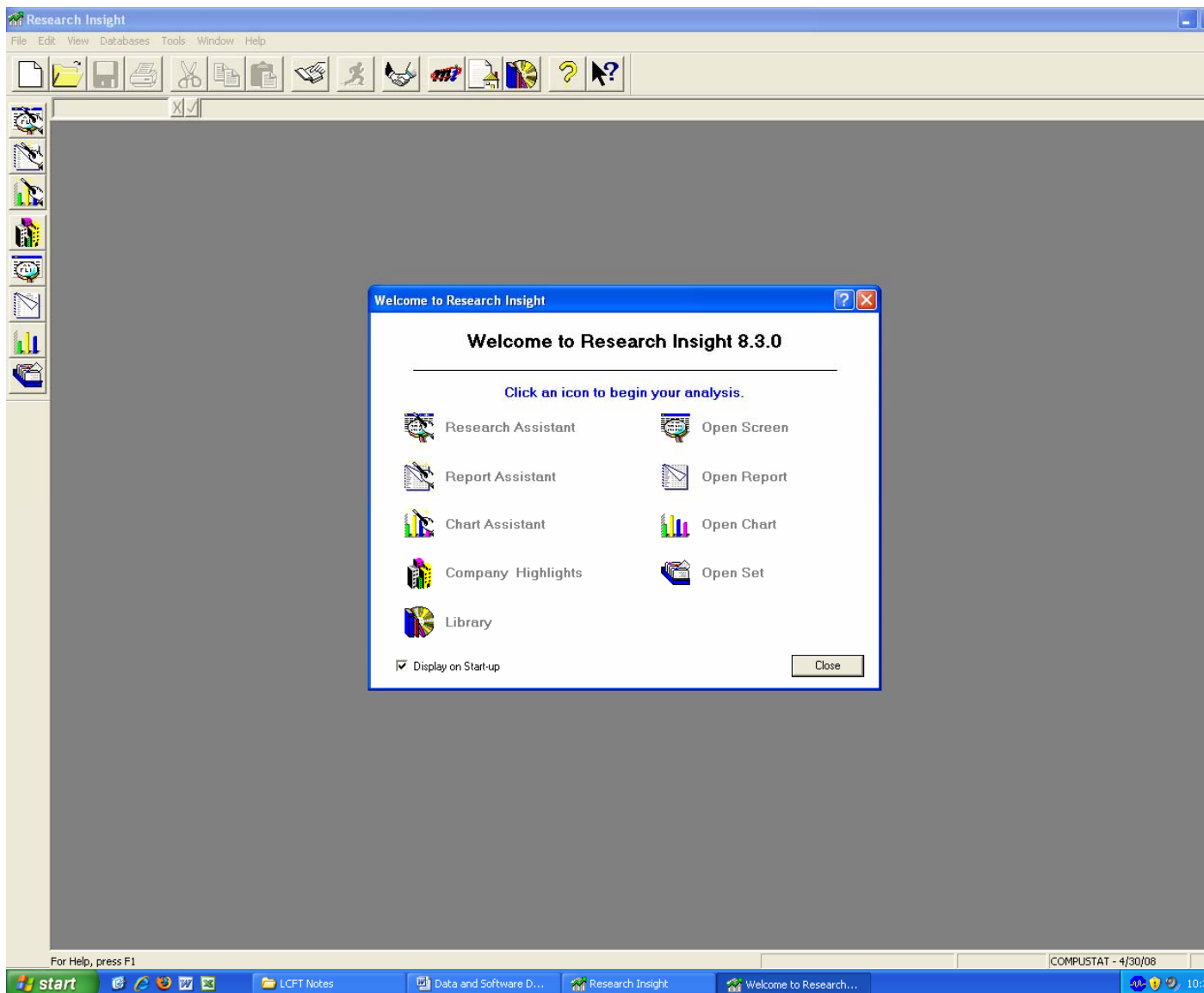
Description	North America	Global
Annual	20	20
Quarterly	48	32
Monthly	240	240
Weekly	16	
Daily (price history)	10 years	

Accessing the Data

When you open Research Insight, the first screen is a Welcome Screen with a set of menu icons that allows you to do search, create report or chart format, or open existing reports and charts. You can close these icons by clicking "Close" and open by clicking the welcome icon at the top (it is the hand shake sign).

1. Set default data base to Compustat or Global Vantage, depending on which one you want. From the top menu items, click on "Databases" then "Default Database..." and from the pull down menu, choose either COMPUSTAT or GLOBAL Vantage and click OK. You will see the current database at the bottom of the screen.
2. **There are already existing reports and charts in Compustat that can be downloaded.**
 - a) Open Reports:

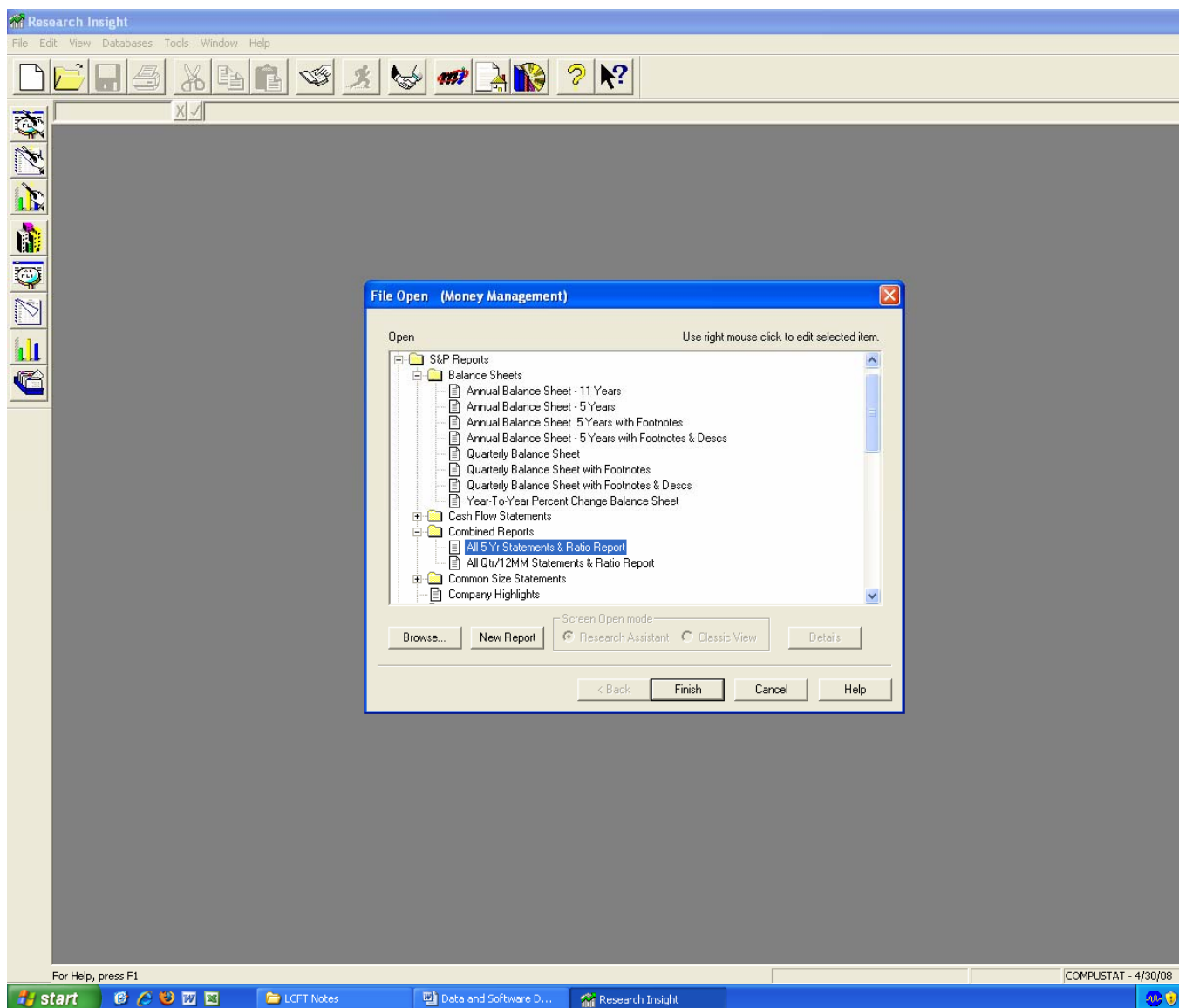
- Click on the Open Reports icon to the right and see the available reports. These are mainly financial statements, ratios, segment reports, industry reports, etc.
- Click Finish
- Type in ticker symbol of the company you want report on and click OK
- If you don't know the company's ticker symbol, click Look Up, type the first few words of company name and search. When you find, double click, and click close. It will be added. If you want report for more than one company, type the ticker symbols separated by comma.



b) Open Charts:

- Click on Open Chart icon to the right
- Select the item from the available list

- Select company or companies by typing in ticker symbols separated by commas
- Click OK
- Scroll down the ticker/name and see the chart for each company you selected.



c) Company Highlights:

- You can similarly click on Company Highlights icon and see quick overview of the company of your interest.

d) Library:

- You can read Business Description of companies, Trends and Projections (about US economy).

e) Launch Homepage:

- Allows you to go to the company's homepage and read more information.

3. Custom Reports

You can search in Research Insight for a company or group of companies, filter, identify specific data items and download in a custom report format.

Research Assistant:

- Click on Research Assistant icon.
- Select company or companies by typing in ticker symbols or by uploading a company set from already prepared file or other filtering mechanisms. You can filter by market value, industry classification, sales, and other criteria. For example, click on Company Specific and choose S&P500 or SIC Code and select.
- Click Next. You will see list of companies you selected.
- Click Next. Select Report Assistant (or any other you want) and click Next.
- Specify report format and period coverage and click Next.
- Select items you want to include in the report from the list. Highlight the item and click "Add>>". You can add as many items as you want. You can also Remove if you change your mind after adding an item. If the item you want is not in the list, you can search for it and include by clicking on "Customize..." and following instructions.
- Click Finish

4. Exporting Reports to Excel

You can export reports and data tables from Research Insight to excel.

- Run the report.
- From the File menu, select Save As. The Save As dialog box appears
- Choose a location (directory) where to save the file.
- Enter the name of the file you want to export
- If you're exporting a free-form report, decide whether you want to export only the current company or if you want to export all of the companies in your set into one file and select the appropriate radio button.
- Click the Text Options ... button. The Text Options dialog box appears.
- Select Tab, Use Labels and Use Quotes.
- Click OK. You'll return to the Save As dialog box.
- Click Save. The results of your report are exported.
- Open Excel. Click File, Open and look for the file in the folder you saved. Be sure to search All Files (*.*)).

- Click open, choose Delimited, click Next, Next, Finish and it opens your file in Excel. You may have to adjust column width to view properly.