CAPITAL IQ
A Division of Standard & Poor's

Quick Reference Guide For Academia

How to Access Capital IQ

If you received login information from Capital IQ

1. Go to www.capitaliq.com

Otherwise, please login to Capital IQ thru your school library or student portal.

Look Up Company/Sponsor/ Person Profiles

- Go to the "Search" box located on the upper left corner of the screen.

- Type in either the company name or the person's last name. **Quick tip:** for public companies you can type t=ticker (i.e. t=csco)

- If there is no exact match, you can choose the correct company or person from the available matches.

- Once you are in the company or person profile, use any blue links and the left-hand toolbar to further delve into relevant data.

Market Analysis

Capital IQ's Market Analysis (3rd tab) offers a broad range of aggregate financials, charts/graphs, transactions, events, news, and key developments as well as relative sector performances.

Scroll over the Market Analysis tab and select one of the following: Analysis, Industries, Geography or Economic Profiles. In Analysis, you can view highlights of industries, geographies, M&A deals, fixed income data, and equity offerings. Industries and Geography allow you to get a quick high-level overview of a specific industry or geography. Economic Profiles allows you to get an overview of GDP, Unemployment, CPI and Exports.

Refine Industry

Use the Refine Industry link on the left-hand toolbar to target an industry sub-sector. Select the Primary Industry of your choice. Check the Industry you would like to add and then click Submit. You can also save your custom industry by checking the box labeled "Save this Industry," prior to clicking Submit.

Idea Generation

Find Buyers/Investors

Find PE firms based on industries, locations, investment history, stages of interest, financials, and keywords.
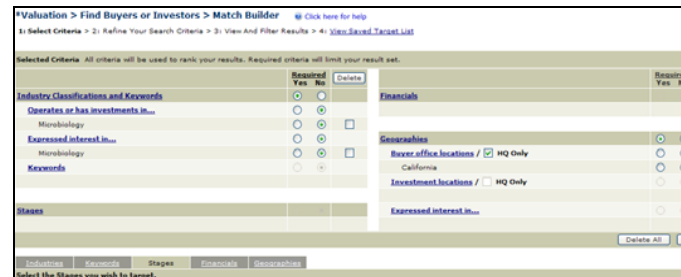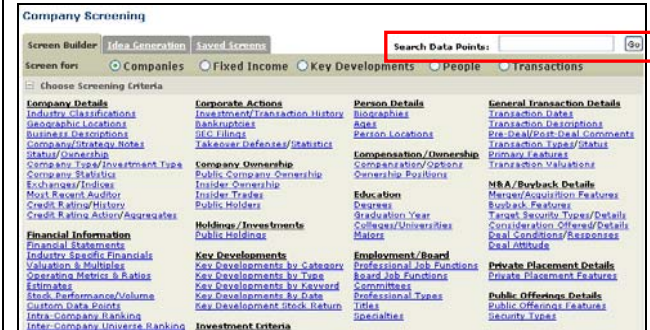

- Scroll over the Screening & Analytics tab > Targeting > Find Buyers/Investors.

- The first page prompts you to create a Project. Projects serve as a file folder to save the results of screens to lists.

- Add criteria to your search. "Yes" and "No" radio buttons: select "yes" if your results _must_ meet the criterion. Select "no" if the criterion is not required.

Find Buyers/Investors - (continue)

- Once you have added all the criteria, click Next.
- Refine your search for B/I based on company type, operating status, ownership, and direct investments.
- From the results screen, we recommend you save the results to a "Target List".

Company Screening

Find companies that match industry, geography, financial, investment and/or event-driven criteria.

- Scroll over the Screening & Analytics tab > Screening > Company Screening.

- The screening tools are integrated so that you can combine company, people, key development, and transaction details all in a single search.

- Click on the header link, select the data point from the available items, and click Add Criteria. The screener serves as a filter and adding additional criteria will refine the result set.

- To view results, click on the number of results or the "Total Matching Companies" link.

- In Screening Results, click on "Select List" button to save results to a Target List, Comp Set, Watch List, or Coverage List.

- **Customize:** Results page defaults to displaying only data items that were part of the screen. To add additional information, clicking the Customize button.

- **Export:** Choose a report format from within the Reporting Options section and clicking Go.

Note: You can use the **Search Data Points** search box to find any data point throughout all of screening.

Sample Company Search

"Find All M&A advisory firms in the Southeast"

Steps:

1. Click on Screening & Analytics (4ᵗʰ Tab), select Company Screening

2. On the Screen Builder page

   - Click on "Industry Classifications", type in merger and acquisition, select "Merger and Acquisition Advisory Services", and then click on Add Criteria.
   - Click on "Geographic Locations", type in southeast, select "Southeast", and then click on Add Criteria.

3. In the Criteria and Results Page
   - To change the order of your criteria, click on the dropdown box under Order Criteria.
   - The number of companies associated with the last criterion reflects your most targeted search. To see these results click on "Total Matching Companies" link.

To access your screen in the future, click on "Save Screen Options", name your screen, select access level and save. You can access saved screens by clicking on the My Saved Screens tab (3rd tab in screening).

Screening Tip

▪ **Add New Criterion** - New criterion is added using AND logic and must meet all criteria.

▪ **Expand Existing Criterion (OR)** - New criterion is added to an existing criterion and the results will meet either of the OR criteria.

▪ **Limit Existing Criterion (AND)** - Criterion is added to an existing criterion using AND logic and should be used when screening within the current parameters. Recommended when searching for companies but using transaction criteria (or vise versa) or when searching for companies and using people criteria (or vise versa).

Coursework Applications

Auditable Financials

Access key statistics, capitalization table, historical multiples, ratios, supplemental data, segment data, and detailed financial statements. Our financial numbers are auditable (any blue hyperlinked number); you can view calculations and underlying SEC filings.

Quick Comps

Embedded within every public company profile. You can view a financial spread of comparable companies including financial data, trading multiples, and operating statistics; and can be exported to Excel.

Building Comps

Build a comparable company analysis in mere minutes. Simply go to the Screening & Analytics tab, choose Comparable Company Analysis, select build comps by entering tickers or build comps by company screening.

Annotated Stock Chart

Embedded within every public company profile. You can correlate stock movement with news and corporate actions.

SEC Filings

SEC filings are available within each public company profile. You can also access SEC filings by clicking on the "SEC Filings" link in the Company Intelligence tab, where you can search all filings by company name, ticker symbol, keyword, industry, or sector and further filtered based on filing type and/or date range.

Chart Builder

Capital IQ's Chart Builder allows you to build charts on one or multiple companies at a single point or over time. Advanced Charting can be found in two areas: 1) left–hand links on every public company profile page, or 2) Screening & Analytics > Charting.

Idea Generation Screens

This is great for people who are interviewing or interested in working for an investment management firm. Pre-defined screens enable you to identify distressed/potentially distressed situations, arbitrage/special opportunities and more. You can mouse over the links for a description and click into any of them to view or modify results.
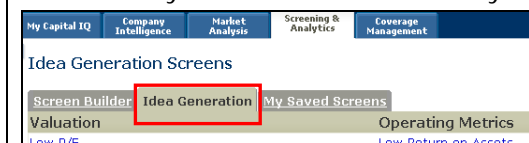
Generate Company Reports

On the Company Profile Page:

▪ Click on the "Generate Reports" link at the bottom of the left-hand toolbar to generate a public information book.

At the Results Page:

Once you build a list from your results page, you can create a number of different reports.

▪ Click on "Project Reports" near the bottom of the left-hand links.

▪ Choose the Basic Reports (predefined) or Custom Reports (build your own) tab.

Within the Custom Reports tab:

▪ Select the report format (Excel or Word).

▪ Choose the information you need for your report by moving available items from the left to the right-hand column.

▪ To save your template, enter a name into the New Template Name box, select an Access Level, then click the **Save Template** button.

▪ Click the **Generate Report** button at either the top or bottom right of the screen.
   - Your saved templates will be available in the Saved Templates dropdown box.

ANY QUESTIONS? Email CLIENT SUPPORT at <u>clientsupport@capitaliq.com</u>