



Quick Reference

for S&P Capital IQ Research InsightSM

This Quick Reference includes step-by-step instructions for some common tasks in Research InsightSM.

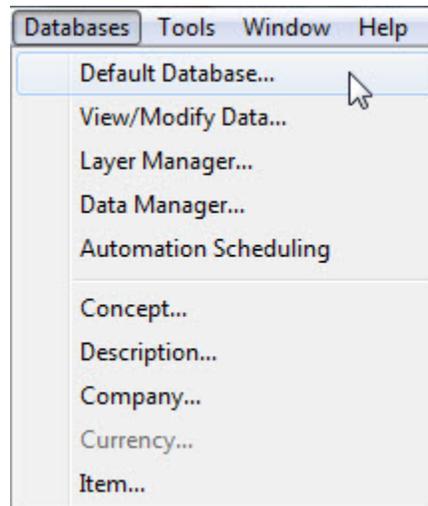
The Welcome Window and Desktop



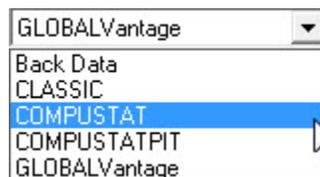
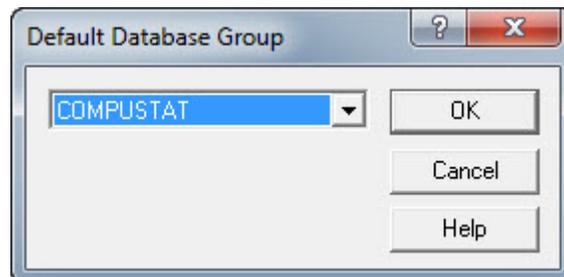
The Welcome window gives you quick access to the basic functions of S&P Capital IQ Research Insight. You can choose from custom screening, report and chart building with the Research Assistant wizards; open one of our large collection of pre-defined screens, reports or charts; retrieve Business Descriptions and S&P Capital IQ Trends and Projections from the Library. When you close the Welcome window you have access to the same icons on the left side of the Research Insight Desktop.

Change the default database

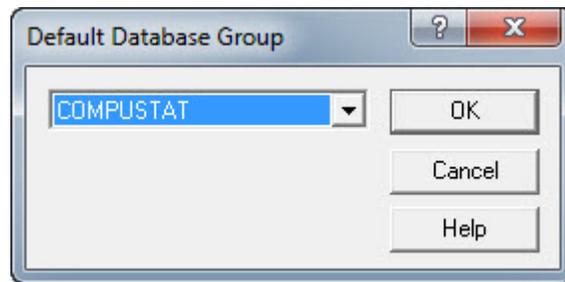
1. From the Databases menu, select **Default Database**.



2. From the Default Database Group dialog box, select a database from the drop-down menu.



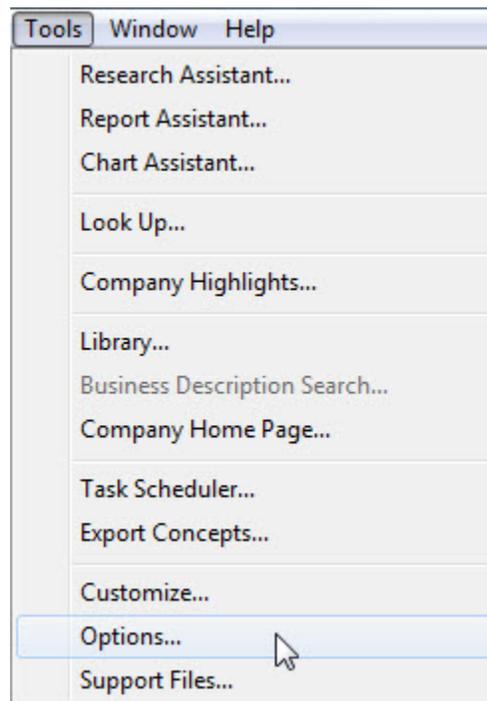
3. Click **OK** to apply your settings.



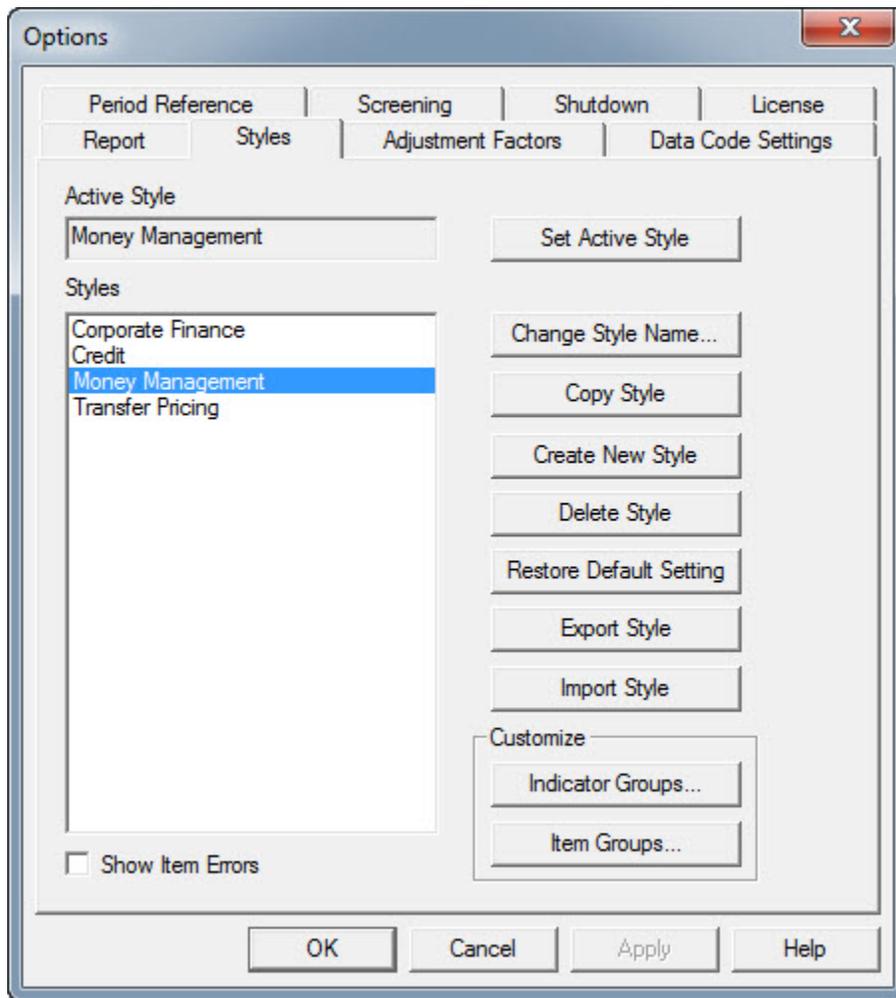
Note: Database availability depends on your subscription.

Set the default style

1. From the **Tools** menu, select **Options**.



2. Select the **Styles** tab.



3. Highlight the desired style option, click **Set Active Style**.
4. Click **OK** to save your settings.

Tip: Choose a style that most closely defines your primary focus. Research Insight Styles determine which data items are displayed in the Research Assistant. Items and tabs are arranged according to the typical workflow of various investment styles.

Find a company using the Look Up List

1. Click the **Look Up List** button. 
2. On the Companies tab in the Select Companies field, start typing the name of the company whose ticker symbol or GVKEY you want to find.
3. Highlight the company.
4. Click **Paste**.
5. Click **Close**.

Note: You can also use the Look Up List to find data items, functions and data sets. For more information, refer to the *Research Insight Getting Started* manual.

Identify the current companies in the S&P 500

Begin from the Research Insight Welcome window or the Research Insight desktop:

1. Click the **Research Assistant** button. 
2. Click **Change Set**.
3. In the Initial Set dialog box, click the **Look Up** button. Scroll through the list that appears and select **\$SP_500**. Click **Paste**, and then click **Close** to return to the Initial Set dialog box.
4. Click **OK** to return to the Research Assistant – Step 1 window.
5. Click **Next** to see the current constituents of the S&P 500.

Search for companies that meet specific investment or financial criteria

The Research Assistant Wizard leads you step-by-step through screening the Compustat[®] databases to identify companies that meet your investment criteria. In this example, you will identify companies with a market value of more than \$2 billion USD, a beta of less than 1.5 and a one-year total return of more than 15%.

Begin from the Research Insight Welcome window or the Research Insight desktop:



1. Click the **Research Assistant** button.
2. Click the **Valuation** tab.
3. Select the **Market Value** checkbox. Adjust fields that appear to the right to read **>** and **2000.00**.
4. Click the **Market** tab. Select the **Beta** checkbox. Adjust the fields that appear to the right to read **<** and **1.5**.
5. Click the **Returns** tab (you may have to scroll the tabs to the right to see it). Select the **1-Year Total Return** checkbox. Adjust the fields that appear to the right to read **>** and **15.00**.
6. Click **Next** to view the results of your screen in the Research Assistant – Step 2 window.

Tip: Click **Next** to proceed to the Research Assistant – Step 3 window where you can open a report or chart for the companies that passed your screen.

Note: This example uses the Money Management Style.

Identify companies in the same GICS Code

Begin from the Research Insight Welcome window or the Research Insight desktop:



1. Click the **Research Assistant** button.
2. In the Research Assistant – Step 1 window, enter the ticker symbol for your target company in the Companies field. In this example, we will use Exxon Mobil Corporation (**XOM**).
3. Select **GICS-Sub-Industry** from the Find Similar Companies list.
4. Click **Next** to view the results in the Research Assistant – Step 2 window.

Tip: If you don't know your target company's stock symbol or GVKEY, click the **Look Up** button. Begin typing the name of your target company in the Select Companies field. Once the name is highlighted, click **Paste** and then **Close**.

To perform this exercise using Compustat® Global data:



1. Click the **Research Assistant** button.
2. In the Research Assistant – Step 1 window, enter the GVKEY for your target company in the Companies field. In this example, we will use Exxon Mobil Corporation (**XOM, GVKEY - 4503**).
3. Select **GICS-Sub-Industry** from the Find Similar Companies list.
4. Click **Next** to view the results in the Research Assistant – Step 2 window.
5. Optional: You can list multiple ticker symbols or GVKEYs by separating each one with a comma.

View performance charts for a company

Research Insight includes dozens of pre-defined charts so you can easily evaluate a company's performance against its peers or benchmarks such as the S&P 500. In this example, you will see how Wells Fargo & Company's 5-year total return to shareholders compares to the S&P 500, as well as the company's S&P 500 industry group.

Begin from the Research Insight Welcome window or the Research Insight desktop:

1. Click the **Open Chart** button. 
2. Expand the **Market** folder.
3. Select **5 Year Total Return to Shareholders**.
4. Click **Finish**.
5. In the Run Assistant dialog box, enter Wells Fargo's ticker symbol (**WFC**) in the Companies field. Click **OK** to see the chart.

Take a quick look at a company's financial highlights

Begin from the Research Insight Welcome window or the Research Insight desktop:

1. Click the **Company Highlights** button. 
2. Enter your target company's ticker symbol or GVKEY in the Companies field.
3. Click **OK**.

Tip: To run financial highlights reports in more than one company, enter ticker symbols or GVKEYs separated by commas. (Remember, you can use the **Look Up** button to locate company names and symbols.) Once the first report appears on your screen, you can view the next company's report by clicking the company's Name or Ticker under Companies.

Find detailed financial reports on a company

Research Insight lets you quickly access detailed financial reports on thousands of companies in the Compustat databases. In this example you will learn how to create a 12-Month Moving Cash Flow Statement for all the companies in the same GICS sub-industry as Home Depot Inc.

Begin from the Research Insight Welcome window or the Research Insight desktop:

1. Click the **Open Report** button. 
2. Expand the **Cash Flow Statements** folder.
3. Select **Twelve Months Moving Statement of Cash Flows** and click **Finish**.

4. In the Run Assistant dialog box, enter the ticker symbol for Home Depot Inc. (**HD**) in the Companies field.
5. Select **GICS-Sub-Industry** from the Find Similar Companies list. Click **OK** to see the report for the first company in the set. To view the report for the other companies, click the company's ticker symbol in the Companies area or click the Name button to display the list of companies by name.

To see an example using Compustat Global data, follow the steps below and enter your target company's GVKEY (instead of a ticker symbol) in Step #4.

1. Click the **Open Report** button. 
2. Expand the **Cash Flow Statements** folder.
3. Select **Statement of Cash Flows-ROW by Activity-Format 10** and click **Finish**.
4. In the Run Assistant dialog box, enter the GVKEY for Home Depot Inc. (**5680**) in the Companies field.
5. Select **GICS-Sub-Industry** from the Find Similar Companies list. Click **OK** to see the report for the first company in the set. To view the report for the other companies, click the company's GVKEY in the Companies area.

Open an Income Statement

Begin from the Research Insight Welcome window or the Research Insight desktop:

1. Click the **Open Report** button. 
2. Expand the **Income Statements** folder.
3. Highlight the **Annual Income Statement - 5 years** and click **Finish**.
4. In the Run Assistant dialog box, enter the ticker symbol for Oracle Corp. (**ORCL**) in the Companies field and click **OK**.

Tip: To change the time period for the report, click the Report Time Periods tab and enter the relevant information. For additional information on time periods see *Research Insight Getting Started*.

View a Business Description

Begin from the Research Insight Welcome window or the Research Insight desktop:

1. Click the **Library** button insert icon. 
2. In the Select Company dialog box entry your target company's ticker symbol or GVKEY.
3. Click **OK**.

4. Highlight **Business Description**.
5. Click **OK** to view the description.

Support and Training Resources

While S&P Capital IQ Research Insight is designed to be easy to use, there may be occasions when you have questions about functionality, data items, etc. Here are some helpful resources:

On-Line Help

Select Help from the menu bar to access a full list of help topics included in the software:

Research Insight Help Topics Topics to assist you in using Research Insight.

Data and Reference Data Item definitions to assist you with building expressions.

FAQs Step-by-step instructions for frequently asked questions regarding Research Insight.

Click the Help button in the lower right-hand corner of any window for a detailed explanation of the window.

On-Demand Training

For more information visit our [website](#) and click on Online Training.

Contact Support

Location	Support Phone	Phone Hours	Email
		Monday-Friday	
U.S., Canada, South America	1.800.523.4534 or 1.303.721.4802	8:00 a.m. to 8:00 p.m. ET	clientsupport@standardandpoors.com Email Hours: Same as Phone
Mexico	1.800.288.2872; after the dial tone, dial 1.800.523.4534	6:00 a.m. to 6:00 p.m. MT	clientsupport@standardandpoors.com Email Hours: Same as Phone
Europe	+44.(0)20.7176.8580 or send a fax: +44(0)20.7176.1203	9:00 a.m. to 5:00 p.m. GMT	clientsupport@standardandpoors.com Email Hours: Same as Phone
Hong Kong	+852.2533.3565	9:00 a.m. to 5:00 p.m. Local Time	clientsupport@standardandpoors.com Email Hours: Same as Phone
Japan	+81.3.4550.8600	9:00 a.m. to 6:00 p.m. Local Time	clientsupport@standardandpoors.com Email Hours: Same as Phone

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January 29, 2015
version 1.1