

PERFORMING ANALYSIS



NAVIGATING FUNCTIONS

Bloomberg functions use common screen elements that work in similar ways. Once you learn about these elements, you can use any function.

Menu Bar

The red bar at the top of each function includes the function's title at the right and provides drop-down menus and buttons to help you perform key tasks. It may also contain a page number indicator.



Amber-Colored Fields

Amber fields indicate areas on the screen that you can change. Amber-colored fields represent editable form elements, text and data input areas and drop-down lists.

Clickable Areas

Moving your cursor over a clickable area of the screen shows one of three types of indicators:

- **A White Outline Box:** Indicates most clickable items, including entries in lists, menus and tables.
- **Numbered Information:** Numbers indicate a topical link, enabling quick access to a related page by either clicking the line or entering the number and clicking <GO>.
- **Highlighting:** Indicates clickable buttons and tabs.

1) Americas	2day	Value
4) DOW JONES		11010.71
5) S&P 500		1146.58
6) NASDAQ		12224.98
7) TSX		33283.52
8) Number <Go>s		

Keyboard Navigation

Typing in the number next to a function allows you to quickly navigate any function using only your keyboard. Many clickable onscreen options are labeled with a Number <GO>.

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STOCK/COMPANY SCREENING

The Equity Screening (EQS) function enables you to perform sophisticated searches for equity securities. There are many levels of criteria you can use in your search.

The following is a quick-start overview for using EQS.

Step 1

» Enter **EQS <GO>**.

The Equity Screening screen appears.



Step 2

» Click the **Build/Edit** Screen tab at the bottom of the screen.

Step 3

» Use the Universe Criteria section to define preliminary search criteria.

a. Click a category. A window appears with options for the selected category.

b. Drag and drop the appropriate criterion from the window so that it appears in the Included Options or Excluded Options section of the window.

c. Click the **Update** button.

The criterion for the category is saved, and the window closes. The Selected Screening Criteria section at the bottom of the tab updates with your selected criterion and count of company matches.

Step 4

» Use the Add Criteria section to refine the search with more data-driven criteria, such as industry classifications, fundamentals and ratios.

a. Click the **Fields** button.

The Browse Fields window appears with a list of all of the available search criteria fields.

b. Use the category tree or Search field at the left of the window to identify the specific criteria field for which you want to set conditions, then click the **Select** button.

The Add Criteria section of the Build/Edit Screen tab updates with the name of the selected criterion field and additional fields that allow you to set a condition(s) for the selected criterion.

c. Enter the appropriate condition(s), then press **<GO>**.

The Selected Screening Criteria section of the screen updates with your selected criterion.

Step 5

» Once you have selected all the criteria for the search, click the **Results** button.

The list of companies (equities) matching your search criteria appears.

Optional: To explore further options such as saving the search or exporting the results to Excel, click the red **Output and Actions** toolbar buttons on the results page.

Note: To access a complete guide to using EQS, press the green **<HELP>** key once from within the EQS function.

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ANALYZING A COMPANY

In "Functions & Securities" and "Navigation", we described the overall logic and navigation of the BLOOMBERG PROFESSIONAL service. With that information, the complete breadth and depth of information on Bloomberg is intuitively and completely discoverable.

This section highlights some of the key company analysis functions available on Bloomberg.

Step 1

» Load the company you want to analyze.

Example: Enter **F US <EQUITY> <GO>**.

The company appears in the panel's toolbar as the loaded security.



Step 2

» Run the analysis function on the loaded security in one of the following ways:

» Click on a category or function from the menu window—or type the mnemonic in the command field—to explore the full range of analysis options.

» Enter the mnemonic for the specific function you want to run, then press **<GO>**.

The analysis function runs on the loaded security.

Example: Enter **DES <GO>**.



Note: Once you load a security, you can run any number of functions to analyze that security without having to re-enter the security

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Mnemonics for popular company analysis functions include:

DES: Company Description and Overview

CN: Company News

HP: Historical Price Table

GP: Historical Price Chart

GIP: Intraday Price Chart

DVD: Dividend Information

ERN: Earnings Summary

FA: Fundamentals and Financial Statements

RG: Total Return Comparison

RELS: Capital Structure (including bonds and CDS spreads)

G: Technical Analysis and/or Multi-Security Charts

Note: To access a function's Help Page (a comprehensive user guide), press the **<HELP>** key once.

For cheatsheets that provide lists of popular analysis functions for specific security types, enter **BU <GO>**, then click the Access Training Documents link.

ANALYZING AN INDEX, BOND OR CURRENCY

The Functions & Securities and Navigation sections of this guide describe the overall logic and navigation of the BLOOMBERG PROFESSIONAL® service. With them, the complete breadth and depth of information on Bloomberg is completely discoverable. This section highlights the process behind loading different types of securities and indices and running analysis functions.

- » Load the security or index you want to analyze using the Autocomplete feature or by entering a ticker and pressing the yellow key.

Examples:

SPX <INDEX> <GO> S&P 500 index

USURTOT <INDEX> <GO> Index tracking the US Unemployment Rate

EUR <CURRENCY> <GO> Euro spot

F 12 5/15/15 <CORP> <GO> Ford Motor Credit bond, 12% coupon, matures May 15, 2015

CL1 <CMDTY> <GO> Front-month NYMEX-traded sweet crude oil futures contract

- » Run the analysis function on the loaded security in one of the following ways:
- » Click on a **category** or **function** from the menu to explore the full range of analysis options.
- » Enter the mnemonic for the function you want to run, then press **<GO>**.

For cheatsheets that provide lists of popular analysis functions for specific security types, enter **BU <GO>**, then click the Access Training Documents link.

Note: In some cases, a function that works for one type of security does not work for a different type of security. For example, the Yield Analysis (YA) function allows you to value a bond. If you load an index and try to run the YA function, an error message appears because the analysis and security type are incompatible.