Quick Reference for Standard & Poor’s Research Insight

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

The Welcome Window and Desktop
The Welcome window gives you quick access to the basic functions of Standard & Poor’s 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 Standard & Poor’s 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.
**Setting Options**

### Changing 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.

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*database availability depends on your subscription*

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### Setting 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.

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### Finding 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 you want to find.
3. Highlight the company.
4. Click **Paste**.
5. Click **Close**.

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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.

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Note: You can also use the Look Up list to find the company. For more information, refer to the Research assistant.
**Identifying 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, then click Close to return to the Initial Set dialog box.
4. Click OK. Research Insight will return you to the Research Assistant – Step 1 window.
5. Click Next. The current constituents of the S&P 500 will appear on your screen.

**Searching for companies that meet specific investment or financial criteria**

The Research Assistant Wizard leads you 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 that $2 billion, a beta of less than .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 the fields that appear to the right to read $>2000.00$.
4. Click the Market tab. Select the Beta checkbox. Adjust the fields that appear to the right to read $<1.5$.
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 $>15.00$.
6. Click Next. The results of your inquiry will appear 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. Please note this example uses the Money Management Style.

**Identifying companies in the sub-industry**

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 Companies field. In this example, we will use Excel.
3. Select GICS-Sub-Industry from the Find Similar list.
4. Click Next. The results will appear on the Research Assistant window.

Tip: To perform this exercise using Compustat® Global, select company's GVKEY (instead of a ticker symbol) in Step 1 Companies field. Once the name is highlighted, Select Companies field. Click the Look Up button.
RUNNING REPORTS AND CHARTS

Viewing performance charts for a company

Research Insight includes dozens of insightful pre-defined charts so you can easily evaluate a company’s performance against its peers or well-known 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. The chart you requested will appear on your screen.

Taking 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 highlight reports on 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.

Name GICS Code

Begin from the Research Insight desktop:

1. Click the GICS Code button.
2. In the GICS Code field, enter the ticker symbol for your target company in the Companies list.
3. Click the Name GICS Code button. (If you don’t know your target company’s stock ticker symbol, enter the name of your target company in the Name GICS Code field and then Close.)

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RUNNING REPORTS AND CHARTS (CONTINUED)

Finding detailed financial reports on a company

Research Insight lets you quickly access detailed financial reports on thousands of companies in the extensive 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 SIC code 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.
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. The report you requested will appear 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.

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

Opening 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 Annual Income Statement - 5 years and click Finish.
4. In the Run Assistant dialog box, enter the ticker symbol for Sun Microsystems Inc. (SUNW) 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.

Viewing a business description

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

1. Click the Library button
2. In the Select Company dialog box enter your target company's ticker symbol or GVKEY.
3. Click OK.
4. Highlight Business Description.
5. Click OK to view the description.
While Standard & Poor's 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 menubar 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.
- **Software Demo**  An interactive demo to help you get started with Research Insight.

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

**Workshops and Customized Training Sessions**
Standard & Poor's offers live, instructor-led training sessions from the comfort of your office. These free workshops are offered throughout the year to help you unleash the power of Research Insight. For more information, please call 800.525.8640, ext. 4899.

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