

Bloomberg

Logging in: Login with existing username and password or create new login

- Click GO → Create a New Login → Follow Steps

Using Bloomberg: Once you log on, you will encounter several home screens. Start on any screen and make sure you type in the top black bar with the blue outline.

- Type ticker then click the “Equity” key (F8). Then click Enter/GO
 - Ex. AAPL
- You should see the main menu of Bloomberg functions. Start with “Security Description” or type DES
 - Screen contains company description, 1yr price chart, basic company fundamentals, dividends if applicable, corporate information, and names of the management
 - Right above the description on the right hand side labeled “7” will be the sector and industry the company operates in. This will be good to know when doing research for the final paper.
 - Tab #4 labeled “Revenue & EPS” will give an overview of revenue and earnings per share for the 4 quarters for 5 years, as well as give estimates for the following year.
- Type “FA” (Financial Analysis) into the top bar. This will take you to the company’s balance sheet, income statement, and statement of cash flows, as well as display various other information.
 - Beyond evaluating the company based on its fundamentals, take a look at tab #6, “Segments”. This tab breaks down the company’s revenue by measure and by geography.
 - If you’ve used Apple, you’ll see under the “By Measure” tab how much of Apple’s revenue comes from iPhones, iPads, Macs (both laptops and desktops), and services for several years. You’ll also be able to see how many units were sold. This information can be used if you want to conduct your own valuation.
 - Click on the “By Geography” tab and you’ll be brought to a breakdown of the company’s revenue by geographical location. For example, Apple makes 43.8% of their revenue in the Americas in 2014.
- Type “RV” (Relative Valuation) into the top bar. This will display **some of the company’s competitors and some useful ratios for a comparables analysis. Tab #21 and #22 will be useful when evaluating the company against its peers. Use the “Custom” tab to input your own ratios. The only values that should appear on this screen are the market capitalizations of all the companies. Input the name of the ratio into the amber box.**

Here are some other useful commands:

ERN: Earnings History - How has the company performed on earnings? Have they beaten analyst expectations? How much have they moved once earnings were released?

SPLC: Supply Chain Analysis - Who does the company sell its products to, and how much revenue do they get from that customer? What companies supply the company you are researching?

EQS: Equity Screener - Type any criteria into the amber box. For example, U.S. Exchanges, Market cap > 1 billion, Price > \$15, Revenue 1yr. growth > 10%, etc...

GP: Line Chart - Graph the price of the security over various time frames

CF: Company Filings - This is where you'll find the company filings. 10K, 10Q, 8K, and Proxy statements can be found here

CN: Company News - Look for news pertaining to that specific company

ANR: Analyst Recommendations

This is how you would use any of these commands above.

- AAPL Equity ERN
- MSFT Equity EQS
- AMBA Equity CN