

## About Mergent Online

Mergent Online is a subscription database of information about U.S. and international private and publicly traded companies, bonds, as well as economic, equity, industry, and country reports. It is accessible from the library's homepage.

Mergent Online provides company information, including:

- Corporate history
- Lists of subsidiaries, property holdings, and key personnel
- Annual and quarterly financial data
- Annual reports and SEC filings
- Current long term debt
- Reports on insider and institutional owners
- U.S. and international historical stock data equity pricing

In addition to company information, Mergent Online contains:

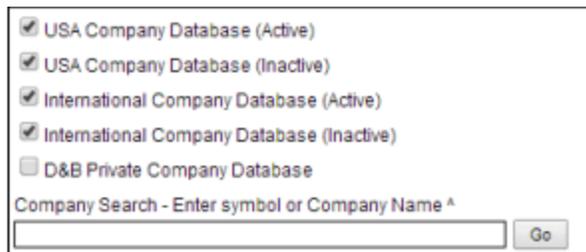
- Bond Search: Issue information, pricing, retail notes, and ratings for corporate, government and municipal bonds
- Country Insights: In-depth country profiles
- Economic Research: Economic data and indicators
- Industry analysis: available for key industry sectors and regions
- Analyst equity reports (Reports tab in a company profile): Provides detailed information regarding stock activity and earnings of select publicly traded U.S. companies, along with securities ratings and recommendations from analysts.

## Find Company Information- Basic Search

With Mergent's Basic Search function, you can search for a specific company or generate a list of companies within an industry.

Use the Company Search bar to search for a specific company by name or ticker symbol.

- Select the company database(s) you wish to search. Options include:



The screenshot shows a search interface with the following elements:

- USA Company Database (Active)
- USA Company Database (Inactive)
- International Company Database (Active)
- International Company Database (Inactive)
- D&B Private Company Database

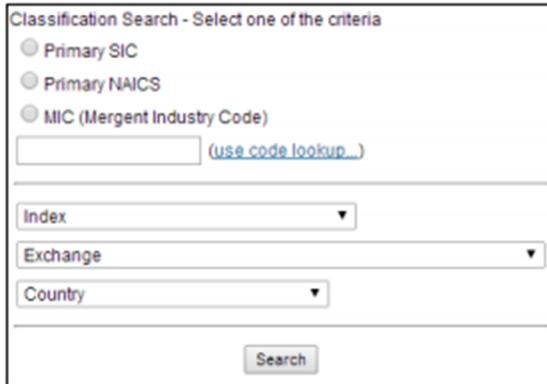
Below the checkboxes is a text input field with the placeholder text "Company Search - Enter symbol or Company Name ^" and a "Go" button to the right.

- US companies (active and inactive)
- International companies (active and inactive)
- Private companies

- Search by company name or ticker symbol in the box provided.
- Select the company name and you will be directed to the company's details page.

## Find Companies by Industry - Classification Search

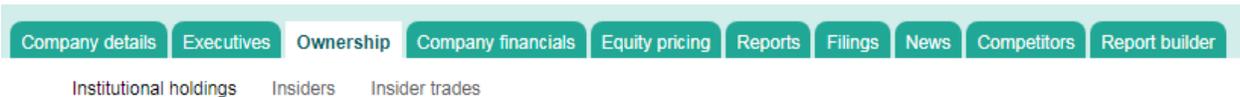
Use the classification search, to search for companies by industry:



- To search by industry codes, first select Primary SIC, Primary NAICS, or MIC
- Type in the industry code, or select use code lookup to search for a code (a pop up window will open up with a list of the codes).
- If you wish to further narrow your search, select which Index, Exchange, and/or Country to narrow by. If there is no specific industry, a search may only be done using only these fields.

## Company Profiles

Each company within Mergent has a company profile. The tabs within the company profile contain a considerable amount of information. There are subtabs within each one.



## Find Competitors and Create Report

Click on the Competitors tab. You'll see a list of companies that Mergent has identified as competitors within the same industry.

- You can add additional companies, or remove the ones you don't want listed in your comparison report.
- After you are done picking the companies you want to include in the comparison, click on Add all to Company Analysis List (on the right side of the same page, just above the table). It will show you how many companies will be added.
- Click on the Company Analysis List link. On the new window that pops up, click on Company Comparison Report (the default is Multiple Company Report).

You can now pick and choose the companies and items you want to compare.

- You can X out companies, or pick and choose only a few of them.
- You can add all of them by clicking on >>.

- Under Select Data Items, click on the plus (+) sign to reveal all the available items, then pick and choose the items you want.
- Pick the years, then report output format (HTML, Excel, etc.), then click Create Report.

Another way to create a comparison report is to click on the Report Builder tab. You can compare your company with various types of competitors (top 10, top 50, all, etc.) in the primary industry (NAIC: North America Industry Classification), only in the target country (US in this example), or the entire world.

## Build a List of Companies – Advanced Search

Use Advanced Search to generate a list of companies by multiple criteria:

- If you only need active companies or US companies, uncheck the other options
- Click on the category tabs (Corporate Information, Executives, Financials, etc.) for available selection criteria. Click the + sign to add specific criteria or click Select All Criteria to add all criteria under the tab.
- After selecting a criterion, click Submit to view the total matches.
- Note the drop-down menu after the number of matches.
- Click View at the end of the final criterion to view the companies that match all the criteria.

After you have viewed the list of companies, you can generate a multiple company report, or do a side-by-side financial comparison:

- Click on Company Analysis List (500 limit).
- Select one of the options (add all companies in the current list or only select companies).

Click on My Mergent Tools on the upper right hand side of the page, then click on the Company Analysis List (which now includes the companies you've selected). You will see a new pop-up window that lets you create a multiple company report, or do a company comparison report.

- The Multiple Company Report (the default option) will be one document that lists multiple companies with selected information items (Company A... Company B... Company C...)
- The Company Comparison Report (you must click on the link to switch over) will provide a side-by-side financial comparison of multiple companies.

Contact me if you need help!

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