## WORKSHOP ON COMPUSTAT/RESEARCH INSIGHT
## DATABASE FOR BEGINNERS
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Authors Note: Any feedback is appreciated. Send comments to elango@ilstu.edu. Thanks.

The following exercises will enable you to learn the following:

1. Finding data on a single company
2. Finding data on several variables for a sample of companies
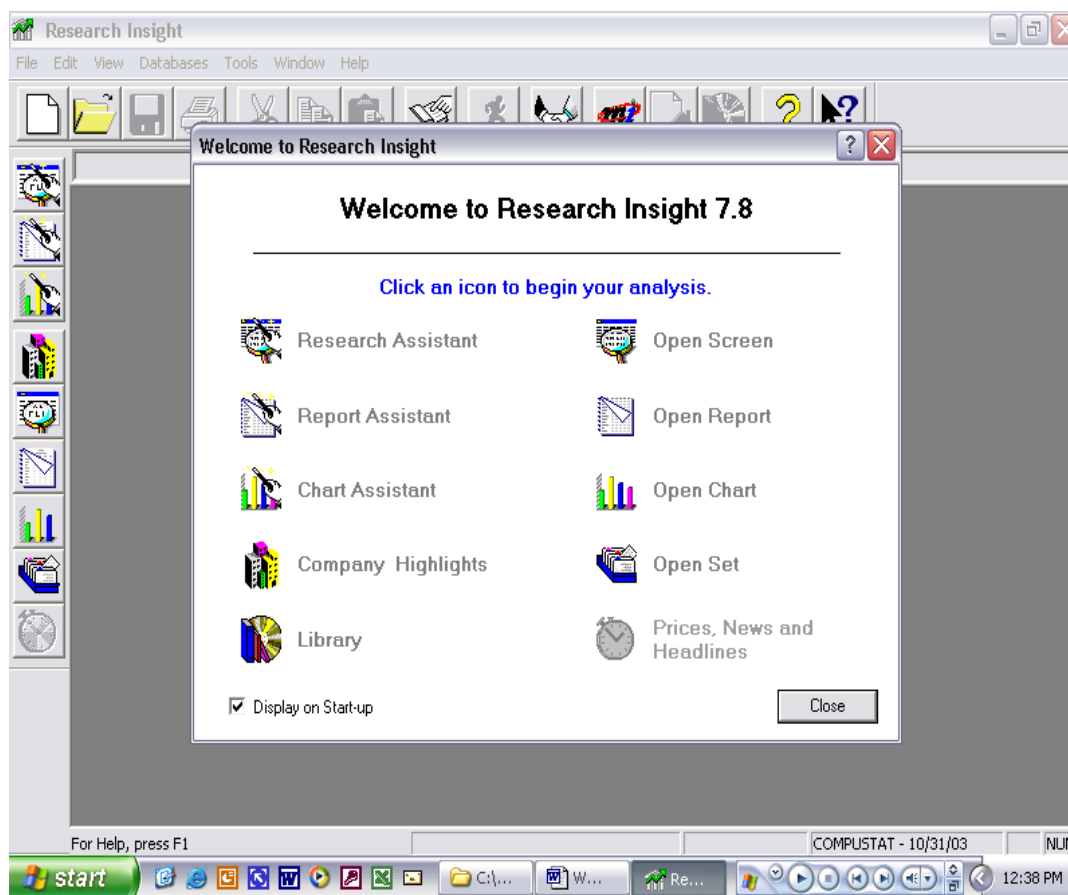3. Finding time series data on several variables for a sample of companies.
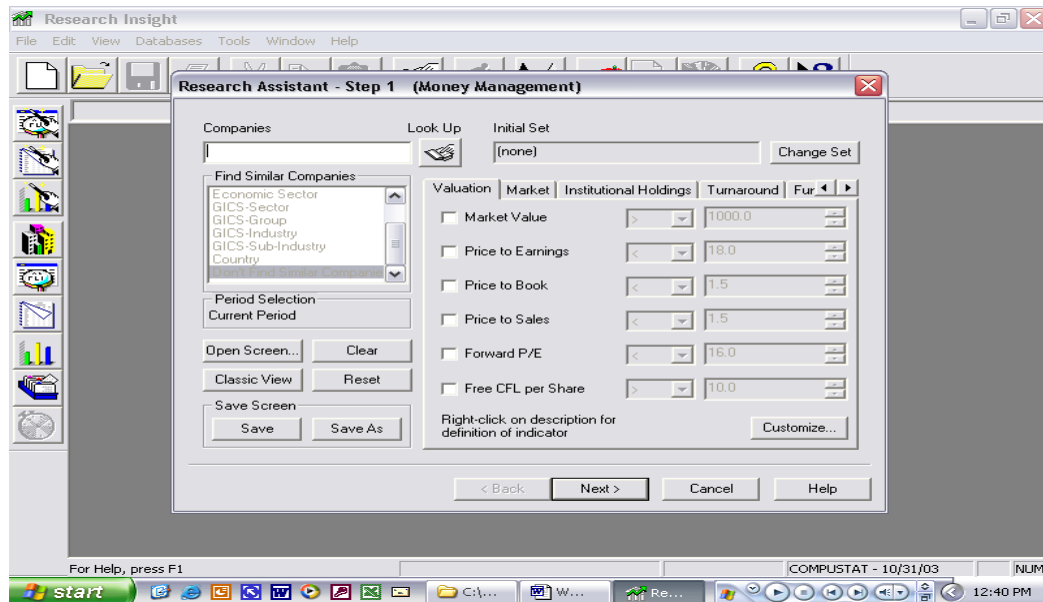

## Exercise 1: Finding data on a single company

Open the Research Insight Program by **clicking** the    Research Insight.lnk    Icon on your desktop or by locating the same in the **Start/Program** menu.

1. The following screen will appear.  Click **Research Assistant**.

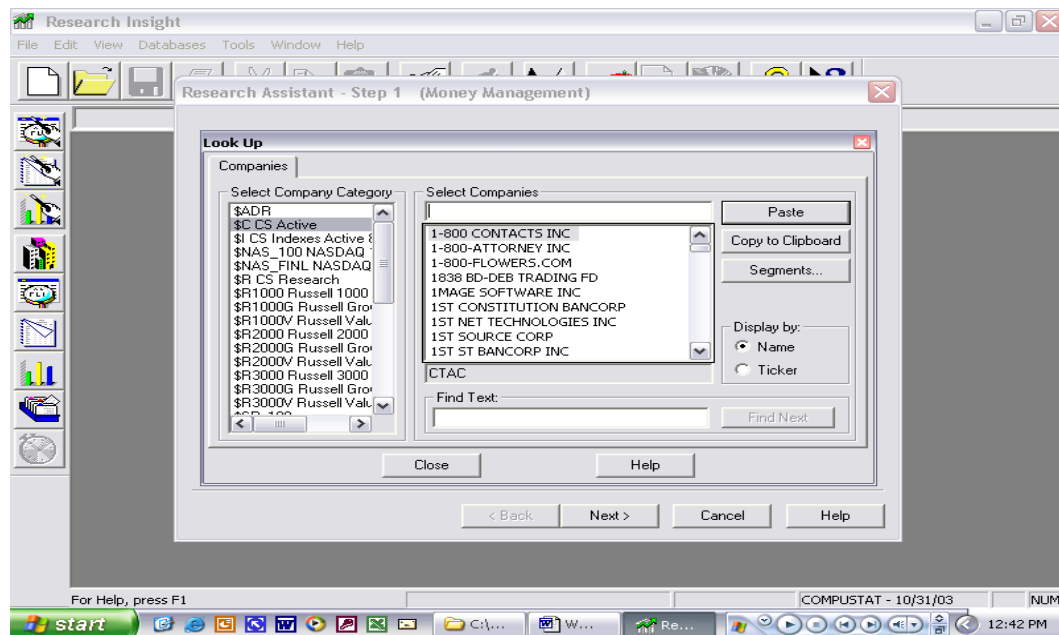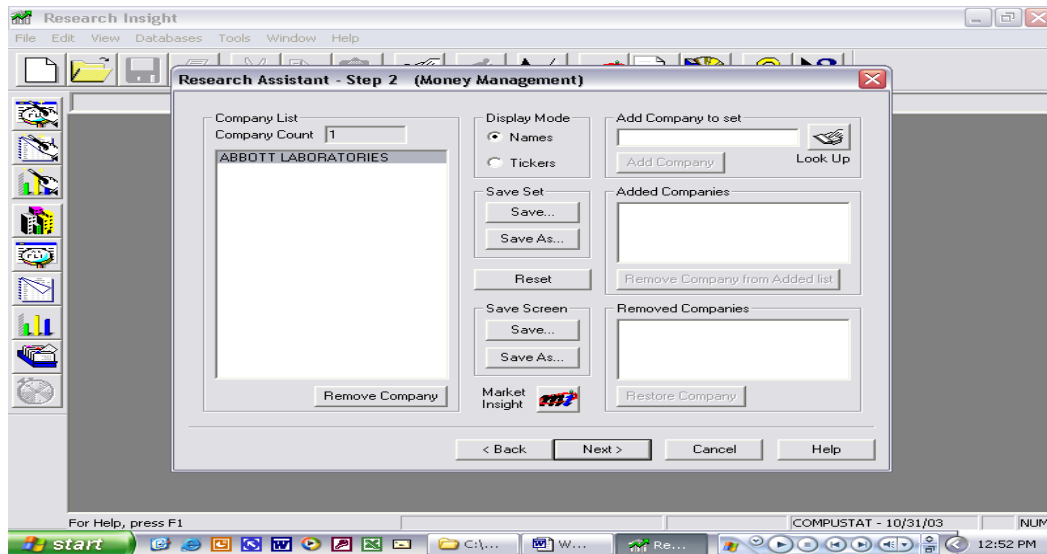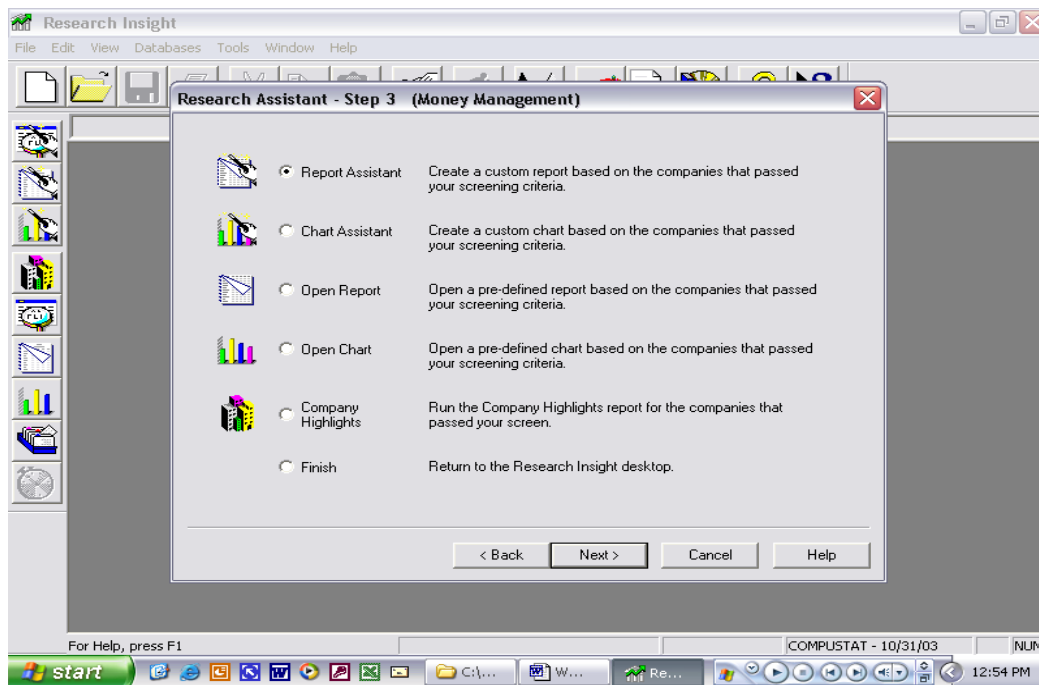2. The following screen will appear. <u>Click</u> **Look Up**.



3. The following screen will appear. [Let's assume I am looking for a particular S&P 500 company, but not quite sure which one]. <u>Click</u> on **$SP_500** on *Select Company Category* box. *Note: you will have to scroll to the bottom of the window/sub-screen to see the available choices*. You will get a listing of all S&P 500 companies in the *Select Companies* box. [You can choose any company, but I am choosing **Abbott Laboratories**]. Next <u>click</u> on the **Paste** button. Next <u>click</u> the **Close** button at the bottom of the current window. Now <u>click</u> **Next>** button on the bottom of the remaining window.
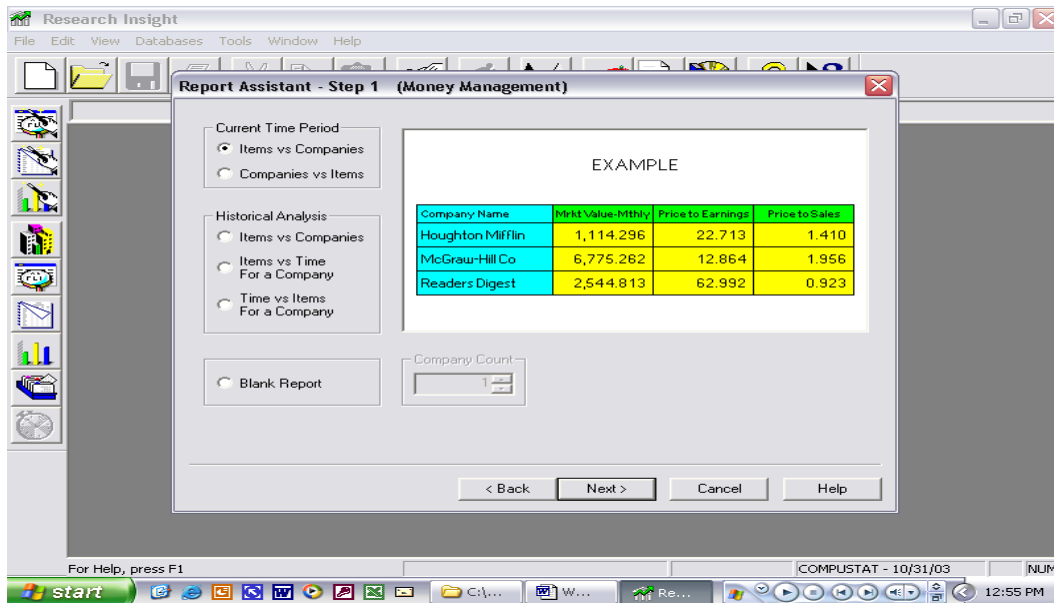
4.  The following screen will appear with the company you have chosen. Click **Next>** button on the bottom of the window.
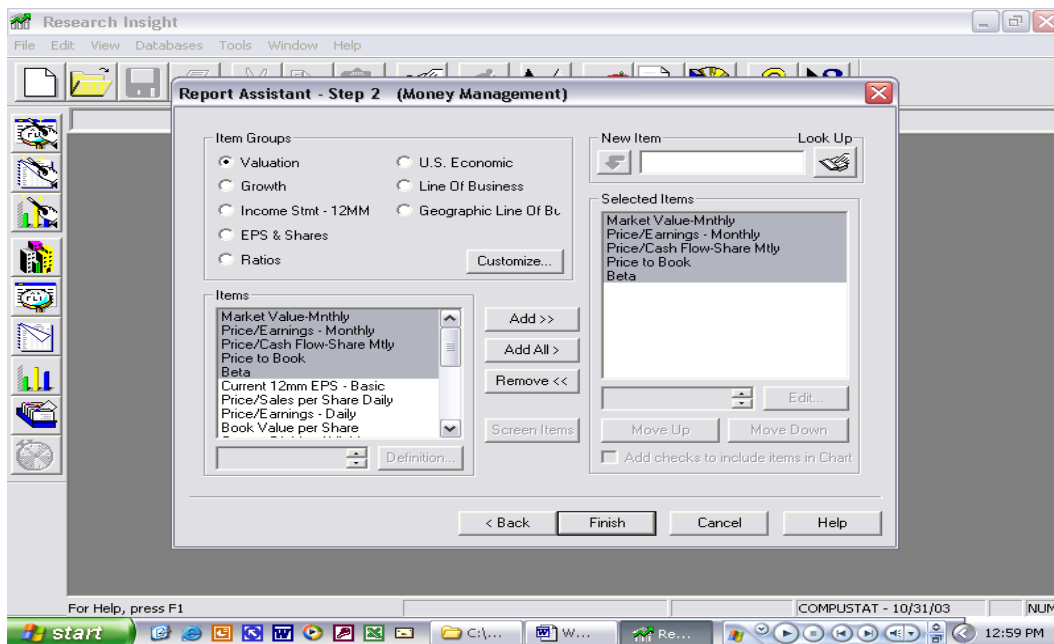


5.  The following screen will appear. Choose **Report Assistant** and Click **Next>** button on the bottom of the window.
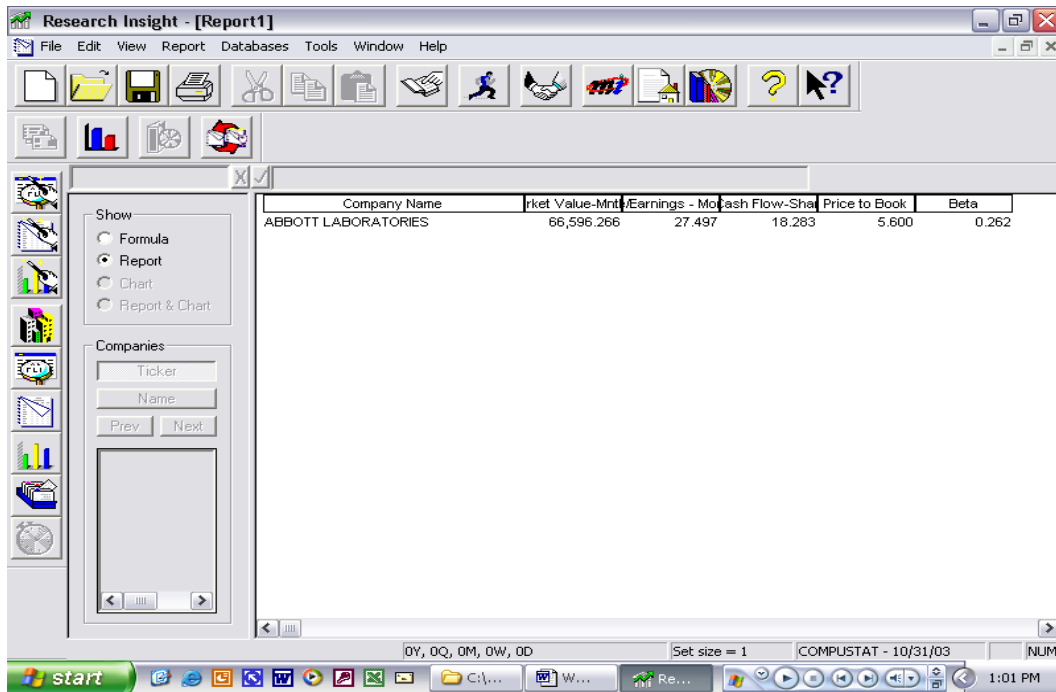
6. The following screen will appear. <u>Choose</u> **Items vs. Companies (Current Time Period)** and <u>Click</u> **Next>** button on the bottom of the window.
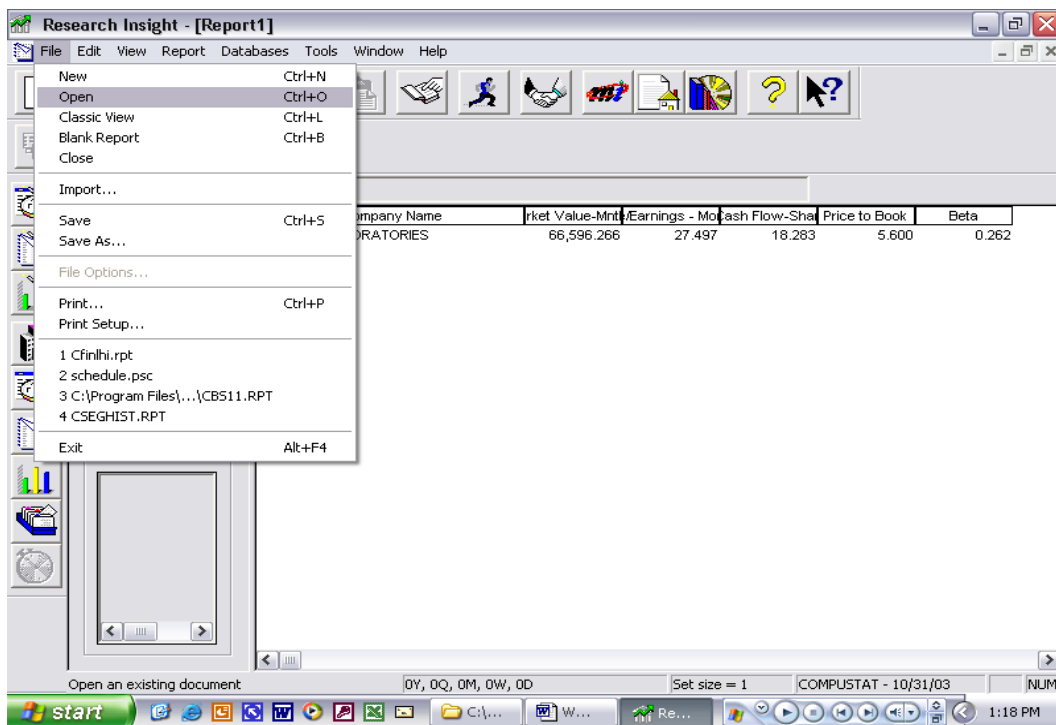


7. The following screen will appear. <u>Choose</u> one of the **Item Group**s and <u>add</u> as many **Items** you want by using the add button [In this example I have chosen valuation and have added the first 5 items]. *Note: you will have to scroll to the bottom of the window/sub-screen to see the available choices.* <u>Click</u> **Finish** button on the bottom of the window.

8. The following screen will appear with the company information you have chosen {if a window pops up before the data just Click **Close** button on the bottom of the window}.
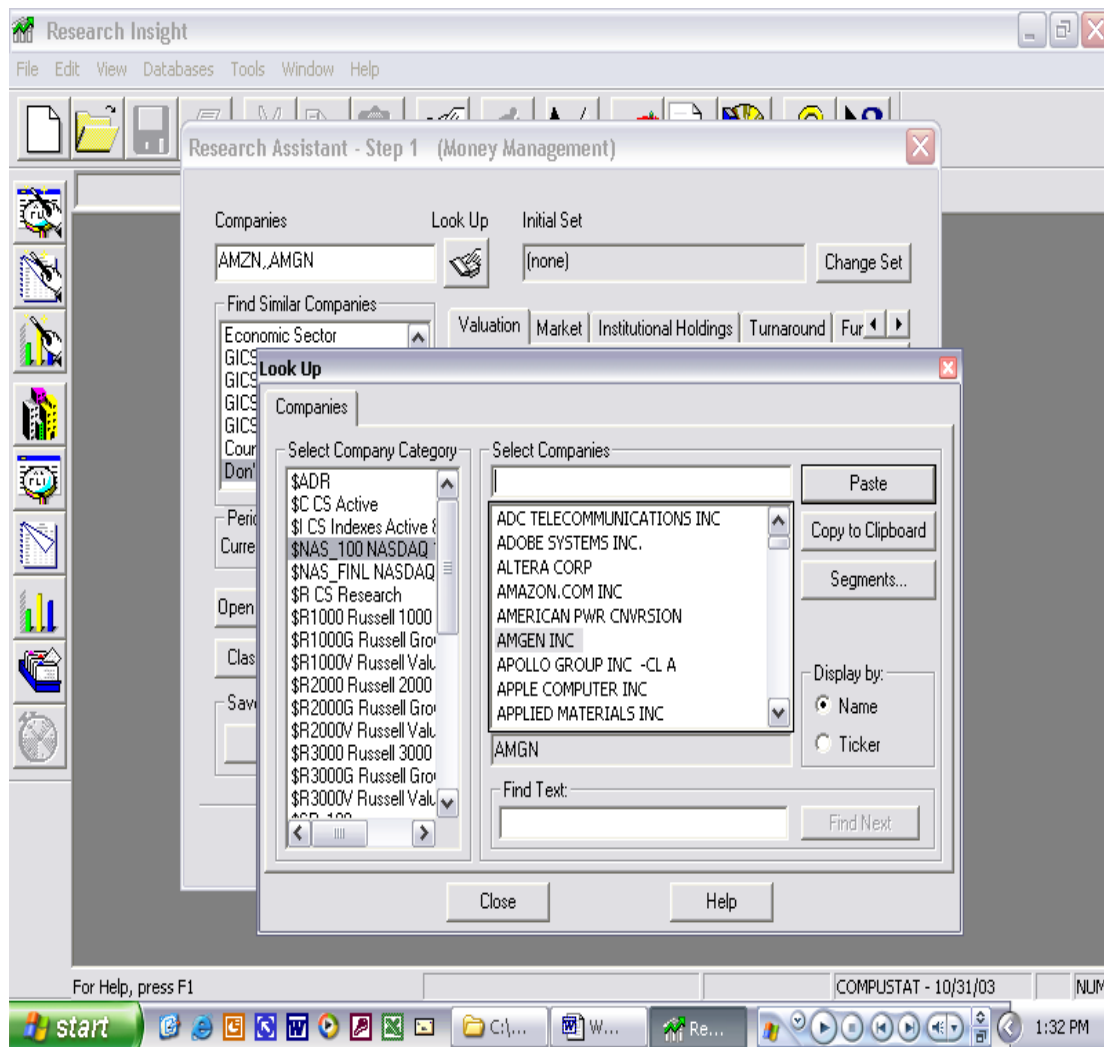


9. Go the **File** at the top of the screen and you can either **Print** the data or **Save** the data (you can Save in text form and Import it into Excel).
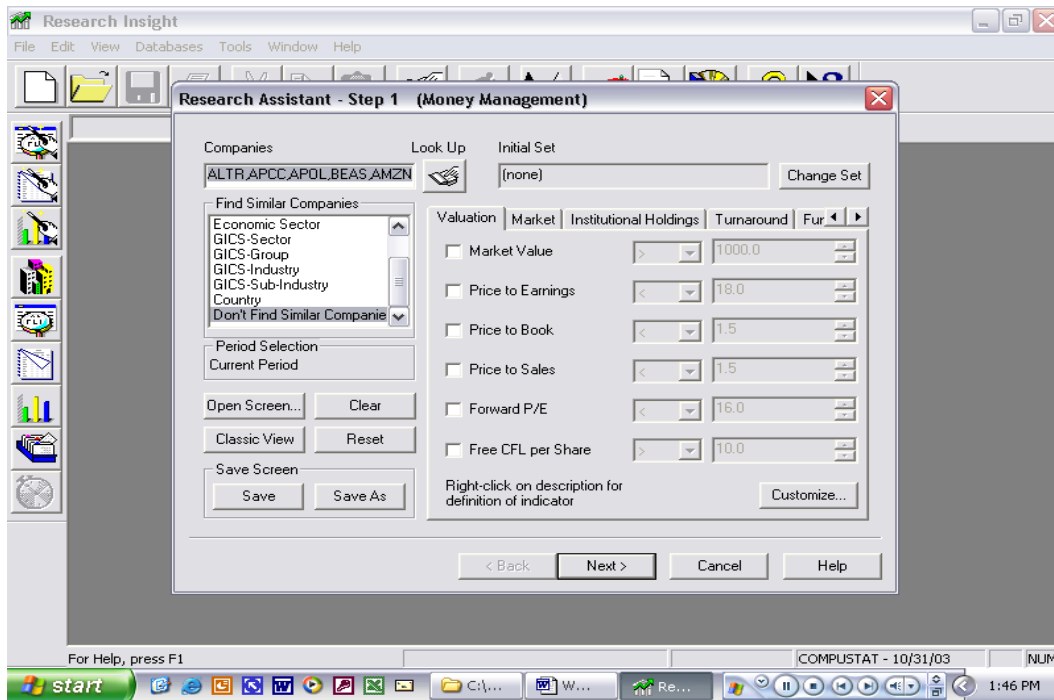
**Exercise 2: Finding data for several variables for a sample of companies**

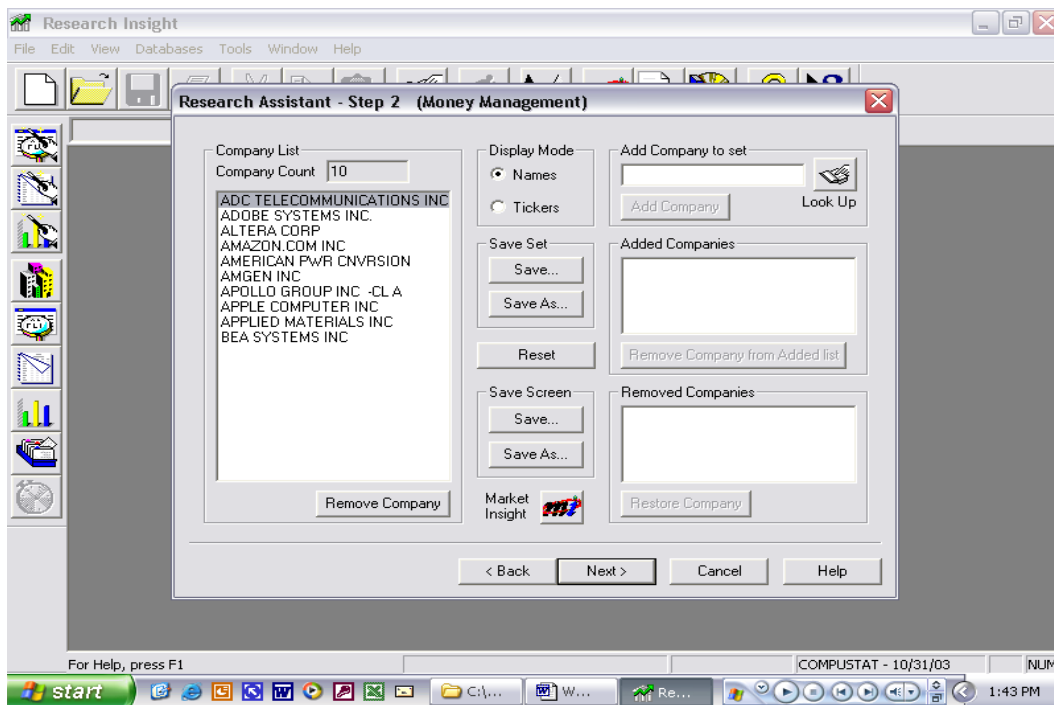*This time let's assume I am interested in getting data for the 10 firms from the list of top 100 NASDAQ firms.*

1. Repeat Step 1 (as we did in Exercise 1).

2. Repeat Step 2 (as we did in Exercise 1).

3. Click on **$NAS_100 NASDAQ 100** on *Select Company Category* box.  You will get a listing of the top 100 NASDAQ companies in the *Select Company* box.  You can choose any of the ten companies you are interested in, by choosing/highlighting the company and clicking the **Paste** button (alternatively, you can accomplish the same by double clicking the company you are interested).  The following screen shows that I have added two companies to my choices (Amazon and Amgen). After you are done adding the 10 companies, click the **Close** button at the bottom of the current window. Now click **Next>** button on the bottom of the remaining window screen.
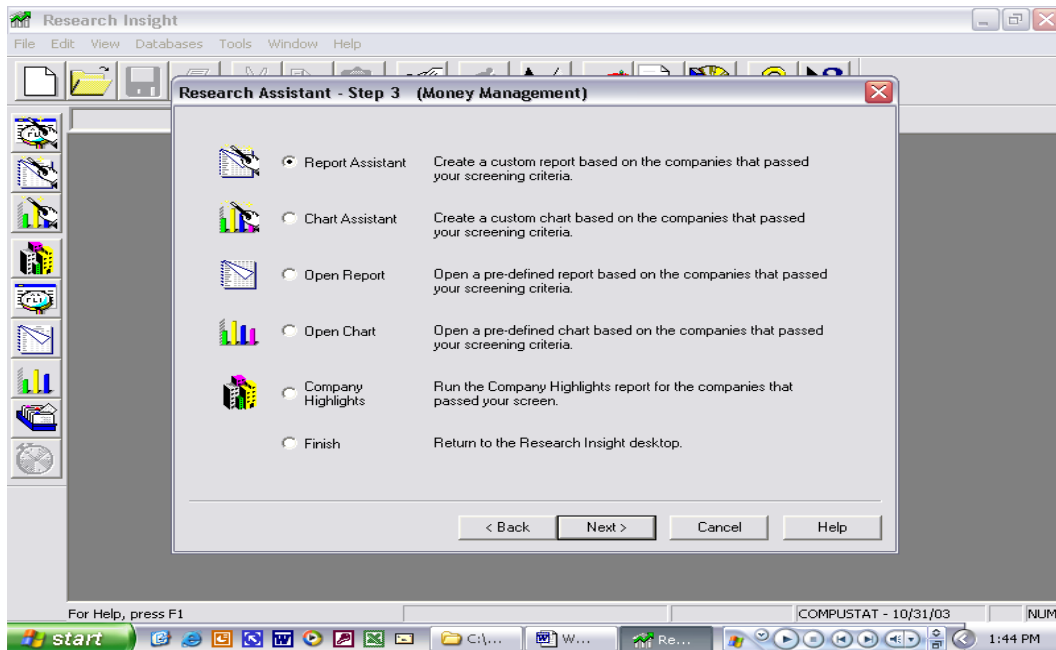
4. The following screen will appear with the ticker names of the companies you have chosen. Click **Next>** button on the bottom of the window.
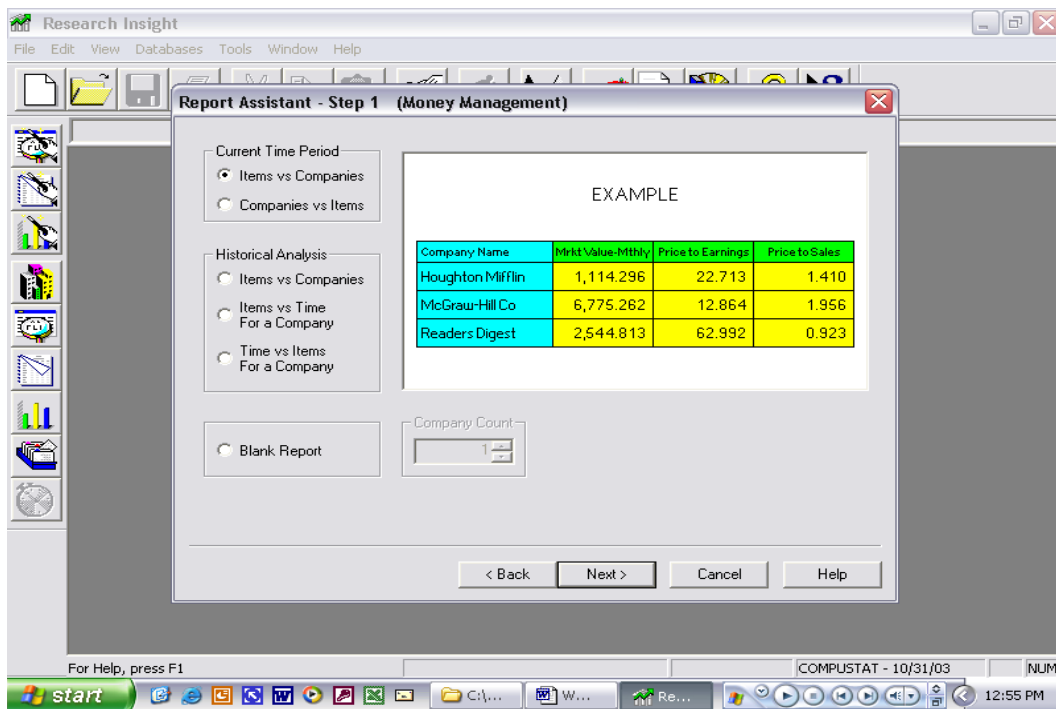


5. The following screen will appear with the names of the companies you have chosen. Click **Next>** button on the bottom of the window.
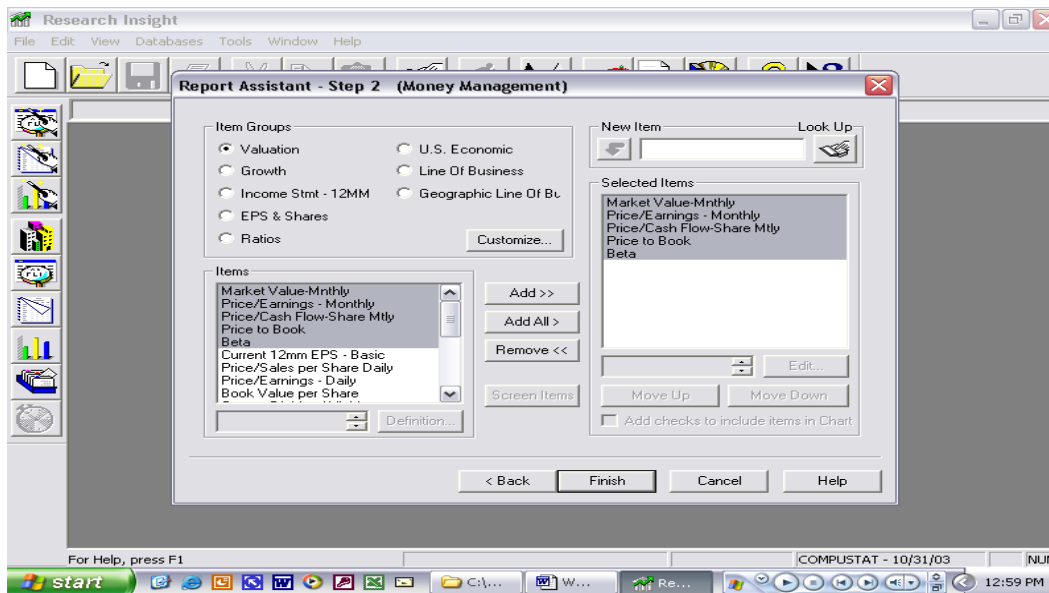
6. The following screen will appear. <u>Choose</u> **Report Assistant** and <u>Click</u> **Next>** button on the bottom of the window.



7. The following screen will appear. <u>Choose</u> **Items vs. Companies (Current Time Period)** and <u>Click</u> **Next>** button on the bottom of the window.

8.  The following screen will appear. <u>Choose</u> one of the **Item Group**s and <u>add</u> as many **Items** you want by using the add button [In this example I have chosen valuation and have added the first 5 items]. <u>Click</u> **Finish** button on the bottom of the window.
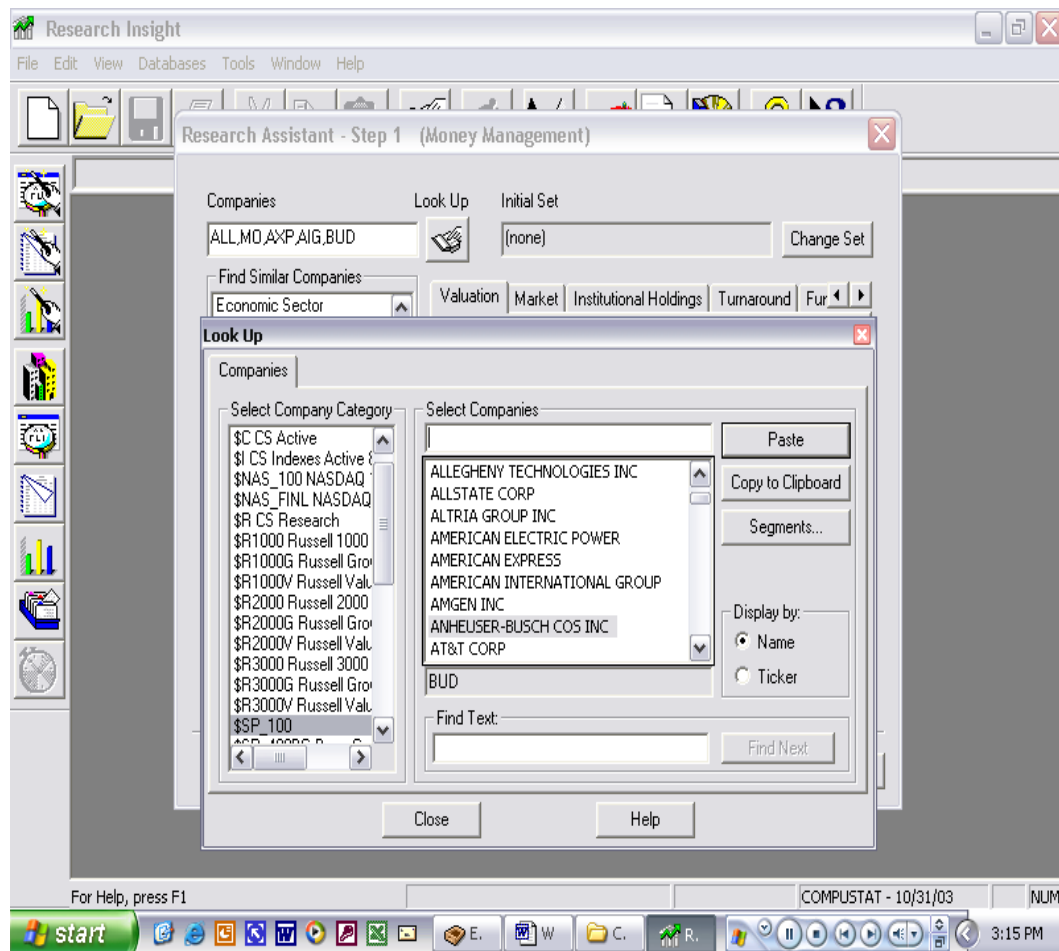


9.  The requested data should appear on your screen as shown {if a window pops up before the data just <u>Click</u> **Close** button on the bottom of the window}. Go the **File** at the top of the screen and you can either **Print** the data or **Save** the data (you can save in text form and Import it into Excel).
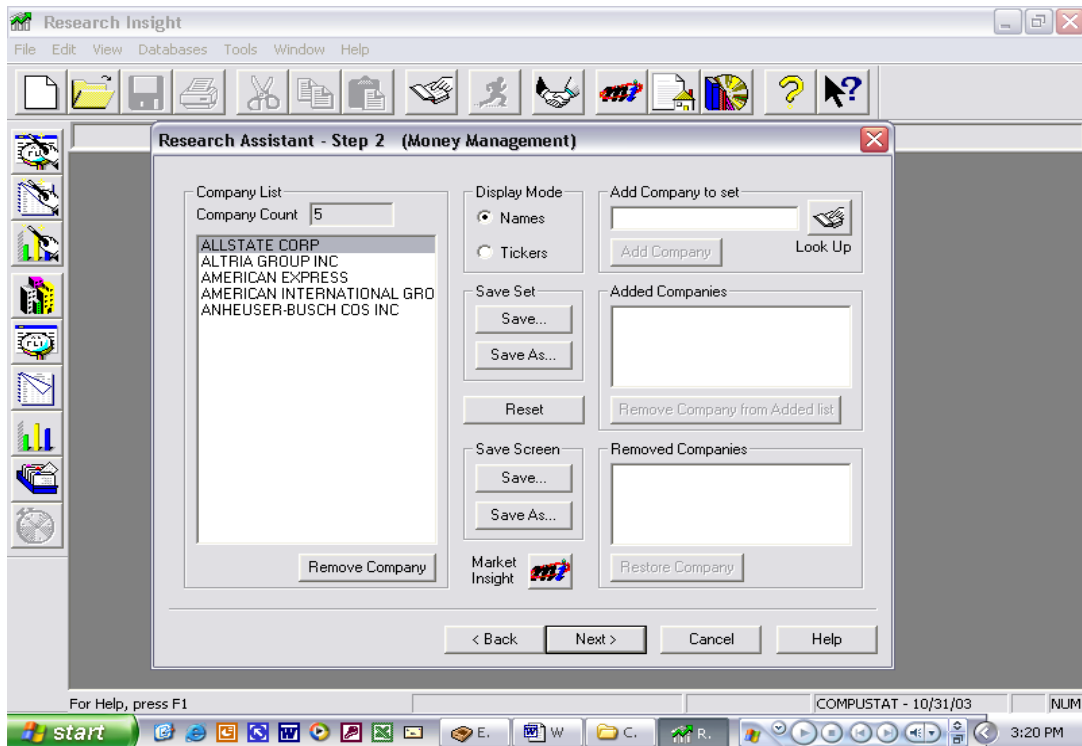
**Exercise 3: Finding time series data on several variables for a sample of companies.**

This time let's assume I am interested in getting data for the 5 firms from the list of top 100 S&P 100 firms for the last 5 five years.
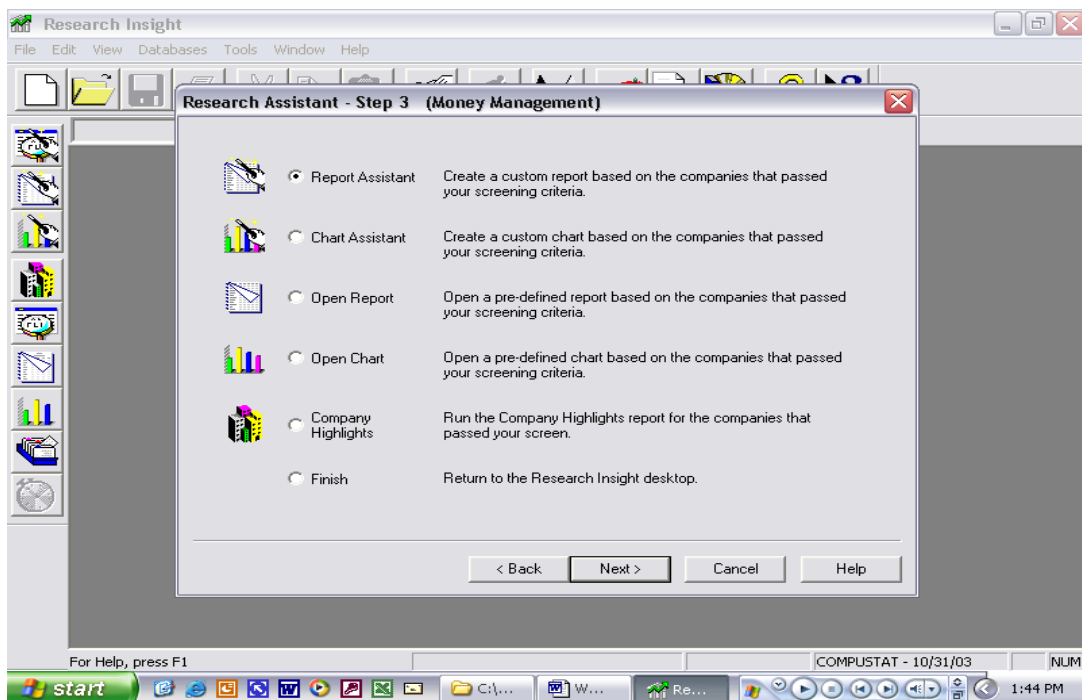
1. Repeat Step 1 (as we did in Exercise 1).

2. Repeat Step 2 (as we did in Exercise 1).

3. Click on **$SP_100** on *Select Company Category* box. You will get a listing of the top 100 S&P 100 companies in the *Select Company* box. You can choose any of the five companies you are interested in, by choosing/highlighting the company and clicking the **Paste** button (alternatively, you can accomplish the same by double clicking the company you are interested). The following screen shows that I have added five companies. After you are done adding the companies you want, click the **Close** button at the bottom of the current window. Now click **Next>** button on the bottom of the remaining window screen.
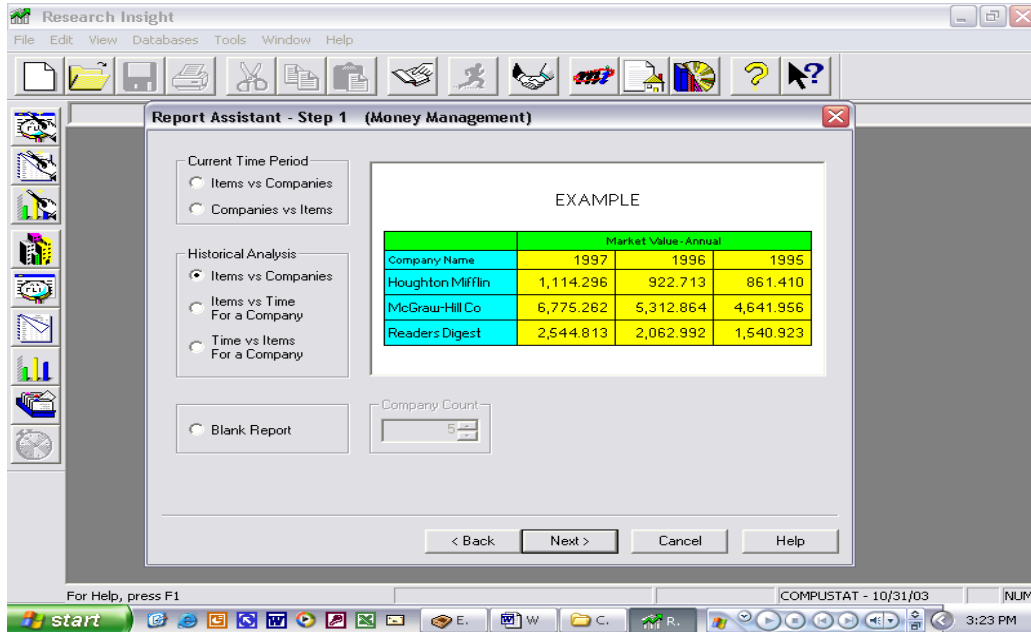
4. The following screen will appear with the names of the companies you have chosen. <u>Click</u> **Next>** button on the bottom of the window.
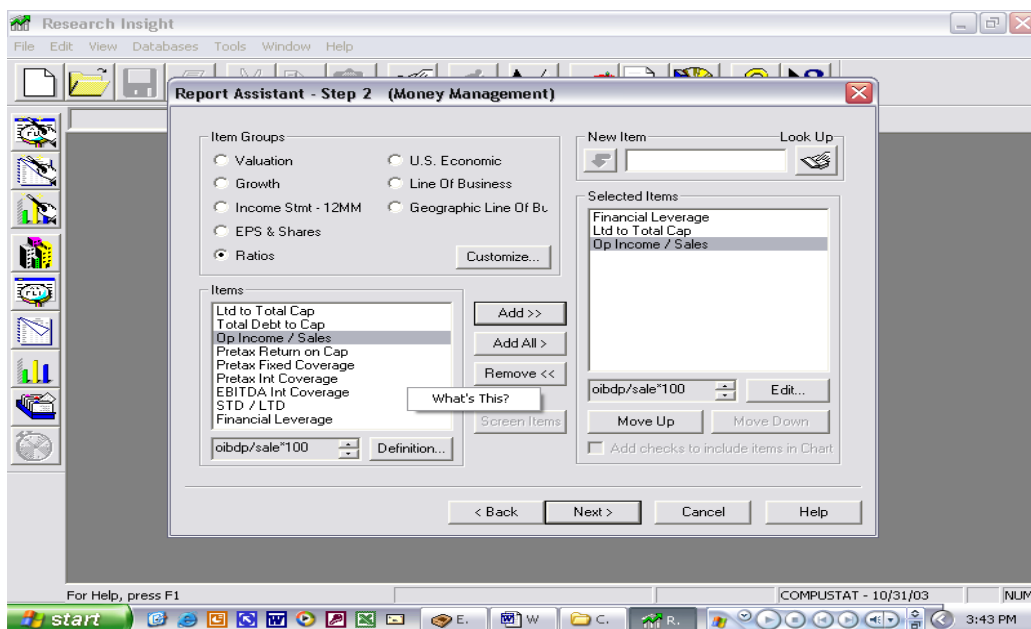


5. The following screen will appear. <u>Choose</u> **Report Assistant** and <u>Click</u> **Next>** button on the bottom of the window.
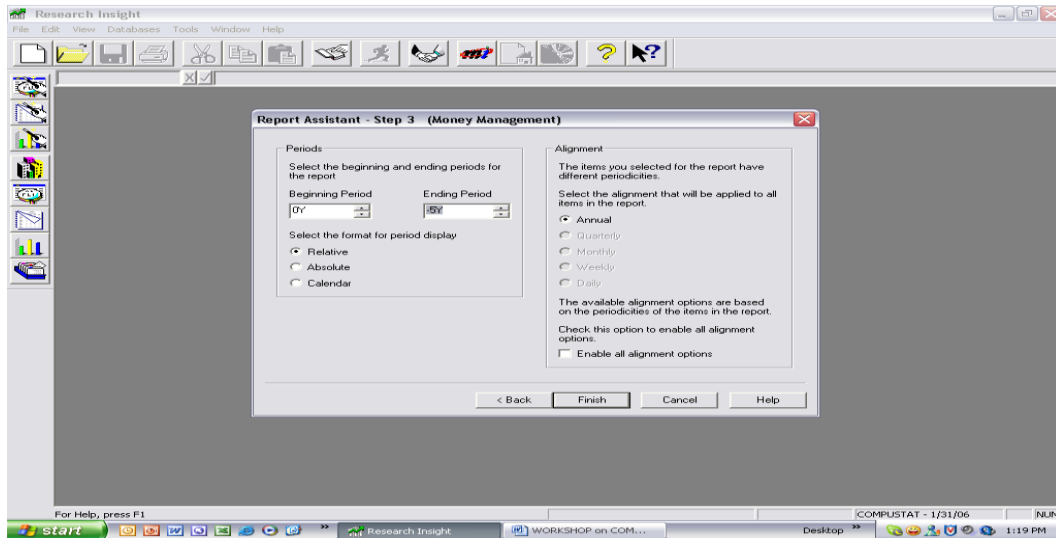
6.  The following screen will appear. <u>Choose</u> **Items vs. Companies** (**under Historical Analysis** -- as we need historical numbers) and <u>Click</u> **Next>** button on the bottom of the window.



7.  The following screen will appear. <u>Choose</u> one of the **Item Group**s and <u>Add</u> as many **Items** you want by using the add button [In this example I have chosen Ratios and have added the 3 items]. <u>Click</u> **Next>** button on the bottom of the window.

8. The following screen will appear. Choose **Relative** and under *Ending Period*  Choose **-5Y** [as we need data for the last five years].  Click **Finish** button on the bottom of the window.



9. The requested data should appear on your screen as shown {if a window pops up before the data just Click **Close** button on the bottom of the window}. *Note: you will have to scroll right of the screen to see the complete data*. Go the **File** at the top of the screen and you can either **Print** the data or **Save** the data (you can save in text form and Import it into Excel).