

# INVESTMENT ANALYSIS LIBRARY INSTRUCTION

## DR. VOLPE – FINANCE 3730

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The sources listed below include **PRINT REFERENCE RESOURCES** or **RESEARCH DATABASES** available through Maag Library. A few web resources that relate to the library resources have been included. Print resources listed are available in the Reference Room for in-library use only. Research databases may be accessed by going to the Maag Library home page at <http://www.maag.ysu.edu> and clicking on **Research Databases** under **Quick Links**. While inside the library you can access these databases directly. For information and directions to off campus access, click on the **Off Campus Access** link under **Quick Links**.

### COMMON STOCK ANALYSIS:

#### ❖ **Print Resources:**

- *Mergent's Handbook of Common Stocks* REF HG4501 .M59  
Key financial statistics on approximately 900 New York Stock Exchange-listed issues. This handbook, updated quarterly, presents market data, performance ratios, stock prices, and dividend information of recent quarterly results as well as future prospects in succinct one-page profiles.
- *Mergent's Handbook of NASDAQ Stocks* REF HG4501 .M58  
Presents market data, performance ratios, stock prices, and dividend information as well as recent quarterly results and future prospects in succinct one-page profiles.
- *Mergent's Dividend Achievers* REF HG4050 .M66  
Approximately 300 U.S. companies that have increased their regular cash dividends annually for 10 or more consecutive years.

#### ❖ **Business Source Complete:**

- **Maag Home Page** → **Research Databases** → **Listed by Subject** → **Business** → **Business Source Complete**
- Find articles from business publications about your company:
  - Enter search terms and click on **Search** to obtain a list of relevant articles
  - Click on article title for citation information and article abstract
  - Click on **HTML Full Text** or **PDF Full Text** to retrieve full text of article
  - If no HTML or PDF link, click on **Find It!** to see if it is full text in another database
- Find a Datamonitor Report for your company:
  - At BSC opening search screen, click **More** on the blue toolbar at the top of the screen
  - Select **Company Profiles**
  - Enter the name of your company in the search box and click on **Browse**
  - Click on **Datamonitor Report** for your company
- Find and search specific publications within Business Source Complete:
  - At BSC opening search screen, click on **Publications** on the blue toolbar at the top of the screen
  - Enter title of a specific publication in Publications search box and click on **Browse**
  - Click on the title of the publication
  - To find specific issues, click on the years listed at the right and select the desired issue
  - To search all available issues of the specific publication, click on **Search within this publication** directly above list of years and enter terms in the search box(es)
  - Examples: *Morningstar StockInvestor*, *Morningstar DividendInvestor*

## ❖ **Mergent Online:**

- **Maag Home Page** → **Research Databases** → **Listed by Subject** → **Business** → **Mergent Online**
- Finding a Company Profile:
  - At Mergent opening screen in Company Search box, enter **Company Name** or **Ticker Symbol** and click **Go**
  - Select appropriate company name to access Company Profile
- **Company Details Tab:**
  - Synopsis includes Business Summary, Pricing Summary, Key Executives, Key Financials, etc.
  - Capital Stock tab reports Recent Dividends, Common Stock Information, Dividends Paid, etc.
  - Financial Highlights, History, Business Description, Property, Subsidiaries, Long Term Debt, Business Analysis
- **Ownership Tab:** Institutional Holdings, Insiders, Insider Trades
- **Company Financials Tab:** Balance Sheet, Income Statement, Retained Earnings, Cash Flow going back 15 years
- **Equity Pricing Tab:**
  - Chart tab: Create a custom chart going back up to 30 years
  - Report tab: Historical Pricing
- **Reports Tab:** Annual Reports, Industry Reports, Equity Reports, Mergent Reports
- **Filings Tab:** Lists most recent SEC filings; To access earlier reports, select **Click here for EDGAR Search**
- **News Tab:** Recent News, Historic News
- **Competitors Tab**
- **Report Builders Tab:** Custom Reports, Report Wizard, Comparison Reports

## ❖ **Reference USA: U.S. Businesses:**

- **Maag Home Page** → **Research Databases** → **Listed by Subject** → **Business** → **Ref USA** → **U.S. Businesses**
- Find a Company Profile:
  - After choosing **U.S. Businesses**, click on the **Custom Search** tab
  - Click on **Company Name**, select **Company Name** and enter your company's name in search box to the right
  - Click on **Financial Data**, select **Ticker Symbol** and enter your company's ticker symbol in search box
  - Click on **View Results**
  - Select appropriate Company Name to access the company profile
  - Profile includes: Corporate Tree, Location Information, Business Profile, Industry Profile, Business Demographics, Management Directory, Company News, Stock Data (SEC filings), Business Expenditures, Historical Data (annual reports), UCC Filings, Nearby Businesses, Competitors Report, Brands & Products...
  - **Stock Data** section includes links to Stock Info and Google Finance

## ❖ **Standard & Poor's NetAdvantage:**

- **Maag Home Page** → **Research Databases** → **Listed by Subject** → **Business** → **S&P's NetAdvantage**
- *Standard & Poor's Stock Report:*
  - In "Simple Search" box in right column choose **Stock Reports** from Resources dropdown menu
  - Select **Ticker** or **Company Name** from Search by dropdown menu
  - Enter company name or ticker in Enter box and click on arrow to access S&P Stock Report
  - Stock Reports may viewed in **HTML** or **PDF** format
- **Companies** tab:
  - At S&P's opening screen, click on the **Companies** tab on the top toolbar
  - Box on left side contains links to **Market Snapshots**, **Outlook's Market Insight**, **Stovall's Sector Watch**, **Takeover Talk**, **Stock Picks and Pans**, **Focus Stock of the Week**, etc.
- Find a Company Profile:
  - From **Companies** tab, select **Company Profile** from Resources dropdown menu, choose **Ticker** or **Company Name** from Search by box, enter ticker or company name in search box, and click on arrow
  - **Overview** includes Business Summary and Company Fact Sheet
  - Navigate company profile from links on left side of screen
- **Quote** links you to company stock quote information
- **Chart** links you to interactive stock chart (up to 10 years)
- **Valuation** links you to Key Stock Statistics, Per Share Data by Fiscal Year, Relative Standings by Calendar Year
- **Dividend & Stock Splits** links you to Dividend Data and Stock Splits
- **Estimates & Opinions:** S&P Opinions, S&P Estimates, Debt, Wall Street Analysts' Earning Consensus...
- **How to Analyze** links you to Independent Equity Research
- S&P Industry Surveys may be viewed in **HTML** or **PDF** format

### ❖ **Value Line Research Center:**

- **Maag Home Page** → **Research Databases** → **Listed by Subject** → **Business** → **Value Line Research Center**
- *The Value Line Investment Survey*:
  - At Value Line opening screen, click on **Standard Edition** under Quick Index on left side of screen and select “Look Up Company”
  - Enter company name or ticker symbol in search box and select Company or Ticker Symbol; Click on **Search**
  - Click on **PDF** icon to access page from print version of *The Value Line Investment Survey*
  - Click on **HTML** icon to access a Custom Report from Value Line, which includes Business Profile, Company Commentary, Company Performance Chart, Income Statement, Financial Information, Industry Commentary, Industry Peers, Fund Owners, Social Responsibility, EDGAR Filings, Insider Table, etc.
- **Model Portfolios**:
  - To illustrate how an investment strategy can meet different goals, Value Line analysts select and maintain three model portfolios, each with a distinctive investment objective. All three portfolios hold 20 stocks.
  - To access 3 model portfolios, click on **Standard Edition** under Quick Index on left side of opening screen and select **Model Portfolio 1**, **Model Portfolio 2**, or **Model Portfolio 3**

## **EXCHANGE-TRADED FUND ANALYSIS:**

### ❖ **Business Source Complete:**

- **Maag Home Page** → **Research Databases** → **Listed by Subject** → **Business** → **Business Source Complete**
- Search specific mutual fund publications for information about exchange-traded funds:
  - At BSC opening screen, click on **Publications** on the blue toolbar at the top of the screen
  - Enter title of specific publication in Publications search box and click on **Browse**
  - Click on the title of the publication
  - To find specific issues, click on the years listed at the right and select the desired issue
  - To search all available issues of the specific publication, click on **Search within this publication** directly above list of years and enter terms in the search box(es)
  - Examples: ***Morningstar FundInvestor***; ***Money Management Executive*** (formerly *Mutual Fund Market News*); ***Fund Strategy***; ***Morningstar Fund Family Reports*** for American Funds, Fidelity, & Vanguard; ***Morningstar GrowthInvestor***; ***Morningstar Practical Finance***
- Search entire database for articles about your exchange-traded fund:
  - At BSC opening screen, enter search terms and click on **Search** to obtain a list of relevant articles
  - Click on article title for citation information and article abstract
  - Click on **HTML Full Text** or **PDF Full Text** to retrieve full text of article
  - If no HTML or PDF link, click on **Find It!** to see if it is full text in another database

### ❖ **Morningstar.com:**

- <http://www.morningstar.com/>
- Enter ticker symbol for your exchange-traded fund in Quote box
- Navigate report using tabs: **Quote**, **Chart**, **Performance**, **Ratings & Risk**, **Portfolio**, **Fees & Expenses**, **Tax**, **Options**, **Filings**

### ❖ **Mergent Online:**

- **Maag Home Page** → **Research Databases** → **Listed by Subject** → **Business** → **Mergent Online**
- At Mergent opening screen, enter the ticker symbol for your ETF in the search box and select the appropriate ETF from the menu that drops down
- **Synopsis** includes Business Summary, Financial Highlights, Pricing Information, etc.
- **Capital Stock** tab reports Recent Dividends, Stock Splits, etc.
- **Company Financials** and **Filings** tab present various company reports
- **Equity Pricing** tab includes Chart and Report subtabs

# MUTUAL FUND ANALYSIS:

## ❖ **Business Source Complete:**

- **Maag Home Page → Research Databases → Listed by Subject → Business → Business Source Complete**
- Search specific mutual fund publications for information about mutual funds:
  - At BSC opening screen, click on **Publications** on the blue toolbar at the top of the screen
  - Enter name of specific publication in Publications search box and click on **Browse**
  - Click on the title of the publication
  - To find specific issues, click on the years listed at the right and select the desired issue
  - To search all available issues of the specific publication, click on **Search within this publication** directly above list of years and enter terms in the search box(es)
  - Examples: **Morningstar FundInvestor**; **Money Management Executive** (formerly *Mutual Fund Market News*); **Fund Strategy**; **Morningstar Fund Family Reports** for American Funds, Fidelity, & Vanguard; **Morningstar GrowthInvestor**; **Morningstar Practical Finance**
- Search entire database for articles about your mutual fund:
  - At BSC opening screen, enter search terms and click on **Search** to obtain a list of relevant articles
  - Click on article title for citation information and article abstract
  - Click on **HTML Full Text** or **PDF Full Text** to retrieve full text of article
  - If no HTML or PDF link, click on **Find It!** to see if it is full text in another database

## ❖ **Morningstar:**

- Morningstar in **PRINT**:
  - *Morningstar Mutual Funds* **READY REF HG4530 .M8** (Held at Reference Desk)
  - Look your mutual fund up in the Index to find the page number for its report
  - Choose funds from Top Performers list
- <http://www.morningstar.com/>
  - Enter ticker symbol for your mutual fund in Quote box
  - Navigate report using tabs: **Quote, Chart, Performance, Ratings & Risk, Management, Portfolio, Expenses, Tax, Purchase, Filings**

## ❖ **Value Line Research Center:**

- **Maag Home Page → Research Databases → Listed by Subject → Business → Value Line Research Center**
- *The Value Line Mutual Fund Survey*:
  - At Value Line opening screen, click on **Mutual Fund Survey** under Quick Index on left side of screen
  - Click on **Lookup Fund**
  - Enter ticker for mutual fund in Symbol search box and click on **Search**
  - Click on Symbol for relevant fund to access report
  - Navigate report through tabs on left side of screen: **Snapshot, Portfolio, Historical, Performance, Fund Load, Management**

## FINDING SPECIFIC PUBLICATIONS:

### ❖ **MJF: Maag Journal Finder:**

- Use MJF: Maag Journal Finder located on Maag Home Page under Quick Links to locate the print and/or electronic holdings of journals
- Search for a specific journal title or browse journals by title or subject

### ❖ **The Wall Street Journal:**

- Maag Library keeps the most current two weeks of print edition in the Reference Room
- Previous issues are on Microfilm X0468 in the 3<sup>rd</sup> floor Microforms Center (allow time lag for transfer to film)

### ❖ **Barron's:**

- Maag Library keeps the most current two weeks of print edition in the Reference Room
- Previous issues are on Microfilm X0339 in the 3<sup>rd</sup> floor Microforms Center (allow time lag for transfer to film)

### ❖ **Forbes:**

- **Available full text in Business Source Complete 1/8/1990 to present**
- At Maag Home Page, click on **MJF: Maag Journal Finder**, enter "Forbes" in search box and click on **Search**
- Click on **Business Source Complete** under *Forbes* to access the publication directly
- To find specific issues, click on the years listed at the right and select desired issue
- To search all available issues of *Forbes*, click on **Search within this publication** directly above list of years and enter terms in the search box(es)

### ❖ **Money:**

- **Available full text in Business Source Complete 5/1/1990 to present**
- At Maag Home Page, click on **MJF: Maag Journal Finder**, enter "Money" in search box and click on **Search**
- Click on **Business Source Complete** under *Money (Chicago, Ill.)* to access the publication directly
- To find specific issues, click on the years listed at the right and select desired issue
- To search all available issues of *Money*, click on **Search within this publication** directly above list of years and enter terms in the search box(es)

### ❖ **Kiplinger's Personal Finance:**

- **Available full text in Business Source Complete 1/1/2000 to present**
- At Maag Home Page, click on **MJF: Maag Journal Finder**, enter "Kiplinger's Personal Finance" in search box and click on **Search**
- Click on **Business Source Complete** under *Kiplinger's Personal Finance* to access the publication directly
- To find specific issues, click on the years listed at the right and select desired issue
- To search all available issues of *Kiplinger's Personal Finance*, click on **Search within this publication** directly above list of years and enter terms in the search box(es)

## LEXIS NEXIS ACADEMIC:

- **Research Databases → L-M → LexisNexis Academic**
- Click on **Sources** (blue tabs on left side of screen), then **Find Sources**
- Type name of specific publication and click on **Find Sources**
- Select source(s) and click on **OK-Continue**
- Enter search terms in search box and click on **Search**
- Click on article title in result list for full text
- Specific publications in LexisNexis Academic: *Fund Action, Fund Strategy, Investment Business Weekly, Investor's Business Daily, Kiplinger's Personal Finance, Money Management, Morningstar US Institutional Database, Morningstar International Institution Database, McClatchy-Tribune Business News* (contains *Morningstar* and *Morningstar Mutual Fund Column*), *On Wall Street, Traders Magazine*...