



# Database Guide: Mergent Online

Mergent Online provides detailed financial statistics for both domestic and international companies. Additional information includes debt information, earnings estimates, company information, and access to EDGAR filings.

## Database Information

**Search Interface:** Mergent Online provides three methods of searching: basic, advanced and EDGAR search.

**Simultaneous Users:** Mergent Online allows up to 4 simultaneous users.

**Dates of Coverage:** Data goes back 15 years or to the date of inception if that is sooner.

## Search Fields and Limits

Mergent Online provides some field searching in Advanced Searching only.

**Categories:** Executives, Financials, General Company Information, Ratios, Textual Search.

**Operators:** Contains, Starts with, Equal to, Does not equal, Greater than, Less than.

**Codes Reference Search:** SIC Lookup, NAICS Lookup, US State Lookup, Region Lookup, Exchange Lookup, Country Lookup.

**Limits:** U.S. Company Data, U.S. Company Data Archive, International Company Data, Foreign Exchanges.

## Basic Search

The Basic Search is the default search method and will be used in the majority of searching. The Basic Search allows you to only search by Company name or Ticker symbol. Please note that the Ferris account does not search private companies

**Basic Search** | Advanced Search | EDGAR Search

Select one of the following criteria below to search by:

Company Name (example: General Electric)  
or  
 Ticker Symbol (example: GE)

Search

Include private companies  US exchanges only

**Advanced Search**  
Advanced Search will give you the ability to search on a wide range of criteria to produce very specific reports.

**EDGAR Search**  
EDGAR Search will allow you to search against SEC filings.

## Advanced Search

Advanced Searching allows the ability to search on a wide range of criteria to produce specific reports.

Basic Search | **Advanced Search** | EDGAR Search

**1. Select a Category / Sub-Category**  
Select a Category  
- Category -  
Select a Sub-Category  
- Sub-Category -

**2. Select Operator**  
 Contains  
 Starts with  
 Equal to  
 Does not equal  
 Greater than  
 Less than

**3. Set Value**

**3a. Select Year**  
Latest

**4. Add Criterion**  
Add Criterion  
Note: Adding criteria will populate the box in step 5.

**Codes Reference**  
SIC Lookup  
NAICS Lookup  
US State Lookup  
Region Lookup  
Exchange Lookup  
Country Lookup

**Recent Searches**  
Clear List




After changing any of the information by use of a pull down menu, clicking Refresh will redisplay the results with the changes made.

### Download to MS Excel


One of the more powerful features of Mergent Online is the ability to download the financial information into MS Excel. If Excel is loaded on your computer, Mergent Online makes this quite easy to do. On the financial screen is a link to Download to MS Excel.

Once the Download link is selected, you will be prompted to open Excel and the data on the screen will be saved in Excel. This option will present itself in numerous places throughout the research session.

### Company Analysis List

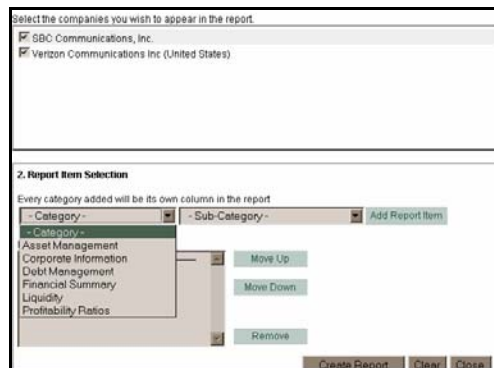
The Company Analysis List allows the creation of reports in a variety of formats. Upon the execution of a search, clicking  places the company into the company analysis list.



To add multiple companies to the analysis list, repeat the search process and click the  to add the other companies. Click on EXPAND to bring up all the companies in the list. Select the companies you wish to analyze and click on the desired report.



The Create Comparison Report allows you to compare the selected companies against each other from 6 major categories which include Asset Management, Corporate Information, Debt Management, Financial Summary, Liquidity, and Profitability Ratios. There are a large number of sub-categories associated with each category. By clicking on Add report item, the selected item appears in the report. This report can then be downloaded into Excel.



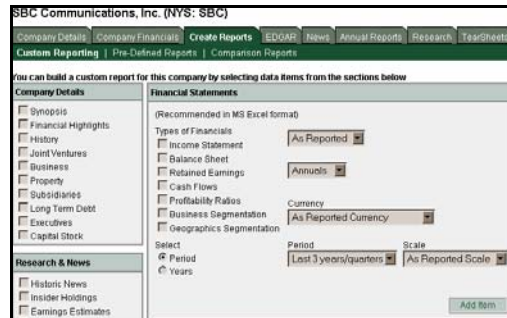
The Create Multiple Company Report, provides a way to add more information to the report that includes textual, as well as financial data, and is described below as well

## Create Reports

Mergent provides another way to generate reports on the companies selected. After selecting a company, under Create Reports are three options: Custom Reporting, Pre-Defined Reports and Comparison Report.

## Custom Reporting

The Custom Reporting facility enables you to collect together a variety of information to create a formatted report. With Custom Reporting you select the individual pages that will make up the report. These reports can then be viewed on the screen or downloaded for separate viewing or printing. The reports can be generated in Microsoft Word, Microsoft Excel or Adobe Acrobat PDF format. This is the same report that was generated by the Create Multiple Company Report from the Company Analysis Screen.



## Pre Defined Reports

Here you select one or more ready built report formats from a list of choices that Mergent provides. Some of these reports are very detailed, while others are brief. Again the option to download into PDF or Word is available.

## Comparison Reports

Two forms of Comparison Reports are available. They compare the currently selected company with:

1. The industry average, using the total revenues of the companies with the same NAIC code as the currently selected company.
2. A custom group of companies chosen from your Company Analysis List.

The Company Analysis List is a list of companies that you can build during a Mergent Online session. The Company Detail and Company Financial pages have a link that enables you to add the currently selected company to the Company Analysis List. See above section on this feature.

### Comparison Reports

#### Compare Company Against Industry

Allows you to compare this company against the overall average of the industry.

#### Compare Company Against Custom Group

Allows you to compare this company against the ones you have compiled in the Company Analysis List.

When you are done with your Mergent session, please LOGOUT of your session so others can use the resource.

### Printing, Emailing, Saving

Mergent does not provide a print option on its screens, rather you use either your browser to print or Excel to print and save. There are no options to email the data to your email account.