Now it’s easier than ever to research your topic:

- a company
- a fund
- an index
- an executive

Just start typing the name or the ticker into the Search Bar

Your typed term will generate a list. Click your selection in the drop-down

Next screen provides an overview description (“Tearsheet”) of your selection.

Use the links in left hand column for a deeper dive into your topic.

Key tools include:

- Industry Classification (to get information on its industry including the Industry Survey)
- Financials (with item drill downs)
- Quick Comps (peer companies)
- S&P Equity Research (where you’ll find the company’s S&P Stock Report)
**Deeper Understanding of Financial Data**

Company financial data is now downloadable and auditable on the new NetAdvantage site:

a) With a company open, select financial data sets from the left hand column

b) Clicking on any number brings up the formula for that financial item

c) Mouse over any number with this symbol to drill down to its components

d) Clicking on a number with no deeper level source opens the filing where that number originated
Researching a company and its competitors

**Company Research**: The *S&P Stock Report* is a widely used source for evaluating a company. For investment research on the company you have open on the primary screen, in the left hand column click on *S&P Equity Research* then see that page for Type> Reports (open by clicking on **Headline** or on the pdf icon.

**Finding a company’s peer group**: When you have a company on screen, click **Peer Analysis > Quick Comps** in the left hand column, then use tabs for different sets of comparisons.
Want More Competitors?

From a company overview, to locate MORE companies in that field:

Click the **Primary Industry Classification** listed for your company.

(If you’re open to a different company page, look in left hand column for that link.)

1) Clicking on the primary industry name opens that company’s industry / market
2) Now use the left hand column for companies in that competitive frame, such as:
   a) **Constituents** - a deep list of what companies operate here
   b) **Key Professionals** – who’s who in the industry
   c) **Key Stats & Ratios** – benchmarks for the industry or sub-industry
   d) **Financial Operating Metrics** - Company financials for the top large, mid, and small size competitors,
       Tabs bring up different sets of financials for the most significant large cap., mid cap., small cap, 
       and mico cap competitors (see screen shot below)
NOTE: Data is downloadable to Excel by clicking the Excel icon under the subject name.

### Screening

An alternative way to create lists of companies is to use the **Screening** tab in the Menu Bar.

- use the **Quick Screener** for basic variables (**Company Screening > Quick Screener** shown below)
- **Or** select from a range of criteria (see **View Criteria** tab),
- To run screen, click **View Results** button in bottom right corner

```plaintext
<table>
<thead>
<tr>
<th>Company</th>
<th>Gross Margin</th>
<th>EBITDA Margin</th>
<th>EBIT Margin</th>
<th>Net Inc Margin</th>
<th>Tot Rev.</th>
<th>Yr Gr.</th>
<th>EBITDA</th>
<th>Yr Gr.</th>
<th>EBIT</th>
<th>Yr Gr.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intel Corporation (Nasdaq:INTC)</td>
<td>62.16</td>
<td>39.97</td>
<td>25.86</td>
<td>17.84</td>
<td>2.47%</td>
<td>4.09%</td>
<td>(5.00)%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taiwan Semiconductor Manufacturing Company Limited (TSEC:2330)</td>
<td>48.84</td>
<td>64.73</td>
<td>33.29</td>
<td>33.49</td>
<td>(2.05)%</td>
<td>(2.44)%</td>
<td>(4.42)%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QUALCOMM Incorporated (Nasdaq:QCOM)</td>
<td>59.74</td>
<td>39.11</td>
<td>32.9</td>
<td>22.04</td>
<td>(13.92)%</td>
<td>6.15%</td>
<td>3.93%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Texas Instruments Inc. (Nasdaq:TXTN)</td>
<td>58.66</td>
<td>41</td>
<td>32.89</td>
<td>23.32</td>
<td>(2.68)%</td>
<td>(1.29)%</td>
<td>1.17%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Broadcom Limited (Nasdaq:AVGO)</td>
<td>68.18</td>
<td>30.5</td>
<td>10.35</td>
<td>-1.55</td>
<td>45.50%</td>
<td>47.91%</td>
<td>21.95%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARM Holdings plc (LSE:ARM)</td>
<td>96.22</td>
<td>44.92</td>
<td>41.31</td>
<td>34.03</td>
<td>21.67%</td>
<td>21.86%</td>
<td>21.76%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TGP Semiconductors IV (Nasdaq:IDIX)</td>
<td>48.55</td>
<td>25.54</td>
<td>13.07</td>
<td>-18.01</td>
<td>-16.87%</td>
<td>15.42%</td>
<td>(22.96)%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

- **Results List** will also let you add more details by clicking
- then click **Browse All Display Columns**
You can search just the same for Mutual Funds, ETFs, or for Indices

Universe of Indices covered is global, so you can find indices for all major markets

Then use the tools in left hand column to get:

- Constituent list
- Key executives
- Price history (using Chart Builder)  Example: click **Chart Builder** in left column
**Chart Builder**'s default period will be the most recent 12 months. You can change period to another selection, or use **Custom** to set your own date range start and end dates.

Available under **Chart Options** dropdown, you can add **Annotations**:

- Company Forecasts and Ratings
- Corporate Structure Related
- Listing/Trading Related
- Potential Transactions
- SEC Filings
- Red Flags/Distress Indicators
- Announced/Completed Transactions
- Customer/Product Related
- Results Announcements/Corporate Communications
- Dividends/Splits

**Downloading Charts:** Click on the Excel icon in the upper area of your screen to open a spreadsheet.

Look for the different tabs at bottom of spreadsheet for data columns and daily pricing on your chart.