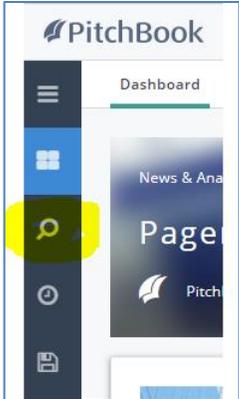


Goizueta Business Library

Creating Bridges to Knowledge

Pitchbook: Tips for Customized Searches for Companies, Investors, Deals, and League Tables

Click on the **Search Icon** on the left of the screen



Following are the options for searching/filtering for companies and deals

Companies & Deals

Investors & Buyers

Funds & IRR

Debt & Lenders

Limited Partners

Service Providers (League Tables, see more details about searching below)

People

Public Financials

Examples of Search Templates and Filtering Options

NOTE: you can query public company transactions in order to locate financials and deal multiples

Companies & Deals

Companies & Deals Search 1,374,755 Results Criteria (0) ▾

Showing criteria for: All Companies ▾

Key Fields

- Deal Criteria
- Deal Types
- Company Signals
- Debt Types
- Exit / Liquidity
- Industry
- Location
- Investors
- Service Providers
- Company Status
- Financial Data
- Other Criteria
- Public Comps
- Lists

Company Info

Ownership Status ⓘ

- Privately Held (backing)
- Privately Held (no backing)
- In IPO Registration
- Publicly Held
- Acquired/Merged
- Acquired/Merged (Operating Subsidiary)
- Out of Business

Backing Status ⓘ

Select backing status(es) ▾

Location

Select location(s) ▾

Search HQ only

Year Founded

Custom Dates Trailing Ranges

From

To

Deal Info

Investors

Add by name, stock symbol, pbID, or URL

Deal Types

Select deal type(s) ▾

Deal Size

Min

Max

Include deals without a deal size

Exclude deals without a deal size

Deal Date

Custom Dates Trailing Ranges

From

To

Only search the most recent transaction

Industries, Verticals & Keywords ⓘ

Type industries, verticals, and keywords

Once you generate your results table, be sure to take advantage of the options to sort and display

Companies & Deals Search | 440 Deals Criteria (1) ▲

Industry Query: Robotics and Drones AND (unmanned OR underwater OR unmanned aerial systems) ×

Overview
Companies
Deals
Investors
Pivot Table ▾
Charts ▾

440 Deals
View
Add Columns
Public Financials

Investors & Buyers

Investors & Buyers Search 270,639 Results Criteria (0) ▾

Showing criteria for: All Investors ▾

Key Fields

- Investor Types
- Investor Location
- General Information
- Stated Preferences
- Fund Criteria
- Fundraising & IRR
- Deal Criteria
- Deal Types
- Deal Exit Types
- Deal Location
- Deal Industry
- Service Providers
- Lists
- Request a Field

Investor Criteria

Investor Names ⓘ

Add by name, stock symbol, pbID, or URL

Investor Types

Select investor type(s) ▾

Only search primary type

Investor Locations

Select location(s) ▾

Search HQ only

Investor Public Exchange

Select Investor Public Exchange(s) ▾

Assets Under Management

Min

Max

Fund Criteria

Fund Names ⓘ

Add by name or pbID

Fund Status

Closed

Evergreen

Open

Without first close

With first close

Upcoming

Fund Size

Min

Max

Fund Date

Custom Dates Trailing Ranges

From

To

Deal Criteria

Deal Types

Select deal type(s) ▾

Deal Size

Min

Max

Include deals without a deal size

Exclude deals without a deal size

Deal Date

Custom Dates Trailing Ranges

From

To

Deal Location

Select deal location(s) ▾

Search HQ only

Industries, Verticals & Keywords ⓘ

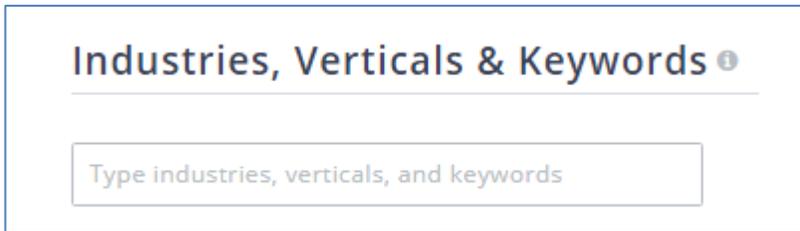
Type industries, verticals, and keywords

Filtering by Industries, Verticals and Keywords

Pitchbook is unique across its competitors (Bloomberg, FactSet, Thomson EIKON) in that it allows you to filter both by the primary Industries (e.g. Healthcare, Energy, Financial Services, Consumer Products/Services, etc.) and Verticals (e.g. 3D Printing, Robotics & Drones, AgTech, Autonomous Cars, Artificial Intelligence/Machine Learning, etc).

You can additionally further refine these selections with keywords (e.g. “unmanned underwater vehicles”). This allows you to tailor your searches with a high degree of specificity.

To view the Industries, Verticals and input unique keywords, click within the Industries, Verticals & Keywords search box, then click on **+Browse All Industries and Verticals**.



Follow the following search examples to create a highly customized search

When to Use Industries vs Verticals vs Keywords

By selecting an industry and/or vertical, you can focus in on a sector and then add keywords to target specific products, services or themes. For example, if you select the industry *Transportation* and the vertical *CleanTech*, you could add keywords such as *bikes* and *cars* to tailor the query even further.

Definitions

Industries are assigned to each company, based upon PitchBook’s proprietary industry categorization. Every company is assigned a primary industry and may be assigned additional industries as deemed relevant.

Verticals represent a specific investment area of focus that cannot be accurately depicted by industry groups alone. Verticals commonly span across industries, such that companies tagged to a vertical may belong to a variety of different industries.

Keywords are assigned based on the content of a company’s business description as well as PitchBook researcher-curated keywords, which include words and phrases related to a company’s products, services, related technology, and target market.

“AND” Search Logic Mode

This mode combines all of your search terms with AND. Use this mode to retrieve results that contain *every one* of the search terms. This type of search will yield the narrowest set of results.

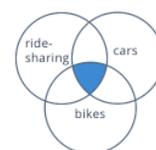
Screenshot:



Search Logic

- OR
- AND
- Custom

Logic Diagram:



“Custom” Search Logic Mode

For full flexibility, use the custom logic mode. This mode allows you to use any combination of Boolean operators (AND, OR & NOT), as well as parentheses to create nested queries.

Nesting

Nesting is a powerful tool for constructing targeted queries by typing parentheses anywhere to group search terms. Consider the following examples.

Search 1 Example: `ridesharing AND cars OR bikes`

Without parentheses the search engine will run *ridesharing* AND *cars* first. This will retrieve three types of companies:

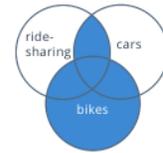
- Companies that include both *ridesharing* AND *cars*
- Companies that include *ridesharing* AND *cars* AND *bikes*
- Companies that include *bikes*

Screenshot:

ridesharing (Keyword) × AND ▾ cars (Keyword) × OR ▾ bikes (Keyword) ×

Search Logic
 OR
 AND
 Custom

Logic Diagram:



Search 2 Example: *ridesharing* AND (*cars* OR *bikes*)

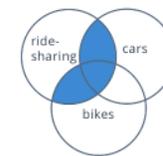
The statement in the parentheses is processed first. This will retrieve companies that contain *cars* or *bikes*. Next, terms outside the parentheses are processed. This will retrieve *bikes* or *cars* companies, but only if they also have the term *ridesharing*.

Screenshot:

ridesharing (Keyword) × AND ▾ (cars (Keyword) × OR ▾ bikes (Keyword) ×)

Search Logic
 OR
 AND
 Custom

Logic Diagram:



Exclusions

Use NOT operators to exclude companies. Starting broad and excluding what you don't want can be another useful way of getting targeted results.

Example: *ridesharing* AND *cars* NOT *bikes*

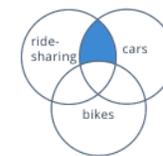
This will retrieve companies that contain *ridesharing* and *cars*, but not *bikes*.

Screenshot:

ridesharing (Keyword) × AND ▾ cars (Keyword) × NOT ▾ bikes (Keyword) ×

Search Logic
 OR
 AND
 Custom

Logic Diagram:



Controlling Keyword Specificity

Special characters can be used in all three search logic modes for more control over keywords (they cannot be used for industries and verticals).

Asterisks for Wildcards

Run a wildcard search to make sure the search results include all keyword variations. Include an asterisk (*) as the last character of the keyword and hit the "Return/Enter" key to add it. PitchBook's search engine will then include any variations that match the letters before the asterisk but differ afterward.

Example: *rideshar**

This will retrieve companies tagged with *ridesharing*, *rideshare*, *ridesharing platform*, etc.

If plurals are the only variations you are concerned about, there is no need to use a wildcard, as the search engine includes plurals and other minor variations by default.

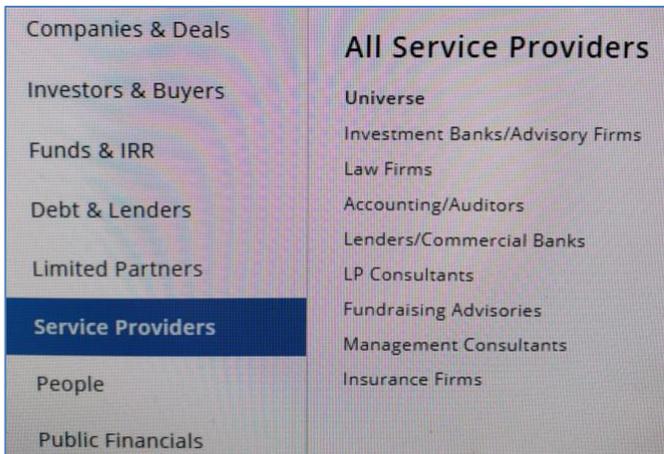
Quotation Marks for Exact Matches

PitchBook's search engine by default will include plurals and other minor variations for keyword terms. For example, searching *bike* will also automatically retrieve companies tagged with *bikes*.

To retrieve only exact matches, place quotation marks around the keyword and hit the "Return/Enter" key to add it. For example: "*bike*"

League Tables

Click **Service Providers**, then click the role



Service Providers Search **51,426 Results** Criteria (0) ▾

Showing criteria for: Investment Banks/Advisory Firms ▾

Service Provider Information

Service Provider Names ⓘ
Add by name, stock symbol, pbID, or URL

Service Provider Types
Select service provider type(s) ▾
 Search Primary Type only

Service Provider Locations
Select service provider location(s) ▾
 Search HQ only

Search by Service Provided

Hired for general services
 Hired for fundraising
 Hired for deal work (buy side)

Client Information

Client Names ⓘ
Add by name, stock symbol, pbID, or URL

Client Types
Select client type(s) ▾

Client Locations
Select client location(s) ▾

Deal Information

Number of Deals

Min
Max

Deal Date
 Custom Dates Trailing Ranges

From
To

Deal Size

Min
Max

Include deals without a size
 Exclude deals without a size

Deal Types
Select deal type(s) ▾

Service Types On Deal
Select service type(s) on deal ▾

Company Information

Industries, Verticals & Keywords ⓘ
Type industries, verticals, and keywords

Company Locations
Select company location(s) ▾
 Search HQ only

Company Universes ⓘ

- Pre-venture
- Venture Capital
- Private Equity
- M&A
- Debt Financed
- Publicly Listed
- Other Private Companies