

Goizueta Business Library

Creating Bridges to Knowledge

Screening for Past Precedents and Comparable Deals Quick Guide to Using FactSet, Thomson EIKON & Bloomberg

FactSet

<http://business.library.emory.edu/research-learning/databases/factset.php>

1. Click on the Screening button at the top of the screen
2. Click Private, M&A, PE/VC
3. Select the box Mergers & Acquisitions; then click General M&A
4. Complete the appropriate filters:
 - Deal Type – Acquisition/Merger
 - Transition Status – Complete
 - Acquirer/Target Sector/Industry – click the magnifying glass icon and use keyword search option; select Primary
 - Add additional filters as needed, such as Announcement Date, Financials, etc.
 - TIP: If you have difficulty finding any deals in which there are public companies involved, you might use the Ownership Type filter and select Public
 - Double click on the filter on the left and it will move to the main screen
 - TIP: Business Description – can be useful if you are struggling with finding good matches based purely on the NAICS/SIC codes; search a keyword (such as nonwoven) without selecting an industry code and see what codes fall out of the search

TIP: Target/Acquirer Company Name – this can be very useful if you have come across names of companies involved in deals in articles, etc.; search for the company name and back into the deal that way; this is especially helpful when most of the parties are not public parent companies

Thomson Reuters Eikon

<http://business.library.emory.edu/research-learning/databases/eikon.php>

1. Click Home icon in upper left corner
2. Click Search Tools>click Advanced Search Tools>click Asset Classes>click Advanced Search – which brings you to the Eikon Search Tools page
3. Under Companies, Equities & Funds, click Mergers & Acquisitions
4. At the M&A Deals Search/Filter template
 - Quick Filters – most frequently used filters
 - Add Filter box – add additional filters from the Data Items Library, e.g. EBITDA, Revenues, etc.
 - Count – check the box to display record count

Bloomberg

<http://business.library.emory.edu/research-learning/databases/bloomberg.php>

You must use the Bloomberg terminal in the Business Library

Once you are in Bloomberg

1. MA<GO>
2. Click, 91<Custom Search>
3. Build customized filters (Industry, Status, Value, etc.)