

Goizueta Business Library

Creating Bridges to Knowledge

Financial Statement Analysis (414/514P)

Susan M. Klopper (Spring 2008)

Economic & Business Climate

▶ [Standard & Poor's NetAdvantage](#) (Industries tab)

- ▶ Trends & Projections
- ▶ IPC (Economic & Stock Market Outlooks)
- ▶ Market/Stock Exchange Snapshots (Companies tab)

<http://business.library.emory.edu/eresources/title/view.php?erid=47>

▶ [Wall Street Journal](#) (Factiva)

- ▶ Click on News Pages to scan most recent 3 weeks

<http://business.library.emory.edu/eresources/title/view.php?erid=20>

Industry Analysis

▶ [Standard & Poor's Industry Surveys](#) (Industries tab)

- ▶ Understand how the industry works, trends, current state, key players, comparative peer financial analysis, and industry norms.

<http://business.library.emory.edu/eresources/title/view.php?erid=47>

Financial Statements

▶ [Thomson ONE Banker](#) (Financial tab>Financial Statements)

<http://business.library.emory.edu/eresources/title/view.php?erid=157>

▶ 20 years of data available; click on Excel icon on top of page to download into a spreadsheet

▶ [EdgarScan](#) (free SEC site)

<http://edgarscan.pwcglobal.com/servlets/edgarscan>

▶ Click on link to Excel Spreadsheet (Extracted Financial Data) to download 10+ years of annual and quarterly data into Excel

Valuation & Business Ratios

▶ [Thomson ONE Banker](#) (Overview tab/Key Fundamentals>View Fundamentals)

- ▶ Also: Financial tab>Financial Ratios/Growth Rates

<http://business.library.emory.edu/eresources/title/view.php?erid=157>

▶ [Standard & Poor's Stock Guide](#) (Companies tab)

<http://business.library.emory.edu/eresources/title/view.php?erid=47>

▶ [Value Line Investment Survey](#)

<http://business.library.emory.edu/eresources/title/view.php?erid=51>

Market Performance

Stock Prices

▶ [Thomson ONE Banker](#) (Prices tab)

<http://business.library.emory.edu/eresources/title/view.php?erid=157>

▶ [Value Line Stock Screening](#)

<http://business.library.emory.edu/eresources/title/view.php?erid=51>

▶ [Yahoo! Finance](#) (free source)

<http://finance.yahoo.com>

Peer Analysis

▶ [Thomson ONE Banker](#) (Peers tab)

<http://business.library.emory.edu/eresources/title/view.php?erid=157>

<http://business.library.emory.edu>

Estimated Earnings

▶ [Thomson ONE Banker](#) (Earnings tab)

<http://business.library.emory.edu/eresources/title/view.php?erid=157>

Wall Street Analysis & Commentary

▶ [Investext](#)

▶ Ibanking research reports on U.S. and international public companies

<http://business.library.emory.edu/eresources/title/view.php?erid=32>

▶ [Wall Street Transcript](#)

▶ Features commentary from industry experts and analysts, CEO interviews, and sector roundtables; provides insight into both company and sector performance and risk

<http://business.library.emory.edu/eresources/title/view.php?erid=54>

▶ [StreetEvents \(Thomson\)](#)

▶ "Conversations" between corporate management and Wall Street analysts. Typically take place when quarterly earnings are released and to discuss other significant corporate events (8K filings).

<http://business.library.emory.edu/eresources/title/view.php?erid=181>

Company News

▶ [Factiva](#)

▶ Search for company press releases, including earnings statements and recently filed SEC files.

▶ Search strategy: sn=business wire and hlp=company name and hlp=keywords (sn=business wire and hlp=Hershey and hlp=(8k or 8-k). To locate WSJ articles: sn=wall street journal and hlp=hershey

<http://business.library.emory.edu/eresources/title/view.php?erid=20>

WANT TO LEARN MORE???

The following guides will be useful for learning more about using these sources and identifying additional ones

Finance Industry

<http://business.library.emory.edu/info/finance/index.html>

Business Valuation

http://business.library.emory.edu/info/business_valuation/index.html

Hedge Funds

http://business.library.emory.edu/info/hedge_funds/index.html

Mergers & Acquisitions

http://business.library.emory.edu/info/mergers_and_acquisitions/index.html

Private Equity

http://business.library.emory.edu/info/private_equity/index.html

NEED ADDITIONAL HELP???

Send an email to the [Ask a Librarian](#) address on First Class to ask questions or schedule an in-person or phone consultation with a business librarian