



# The Sainsbury Library

One of the Bodleian Libraries

## S&P Aftermarket Research

A collection of full-text analysts' reports from over 1,700 brokers and independent research providers around the globe, including J.P. Morgan, UBS Investment Bank, HSBC, Deutsche Bank, Jefferies & Company, and RBC Capital Markets. Coverage is global and covers both companies and industries. The database is only accessible by postgraduates and staff.

### Accessing the database

To access the databases, go to the Sainsbury Library website at:

<http://www.bodleian.ox.ac.uk/business>

If accessing this database outside the Oxford network, you will be prompted for your **Single Sign-On (SSO)**

### Searching for analyst reports

Once you've signed in to Capital IQ, click on the RESEARCH tab on the home screen.

The screenshot shows the S&P Capital IQ web application. At the top, there is a search bar with the text "Search Companies, People, Funds, and More...". Below the search bar is a navigation menu with tabs for "My Capital IQ", "Companies", "Research", "Markets", "Screening", "Charting", "Coverage", "Projects", "Alpha Factors", "Real-Time", and "Structured Models". The "Research" tab is currently selected. On the left side, there is a sidebar menu with categories like "Search Profiles", "My Capital IQ", "My Profile", "Group Management", and "Admin Tools". The main content area features a "Welcome Becci Hutchins Dashboard" and a "Product Notification: New RatingsDirect® Monitor". There are also utility links at the bottom right, including "Take a Tour of the new Dashboard".

Use the QUICK SEARCH to look for reports on specific companies or keywords. You may need to change the DATE RANGE in order to show more results.

The screenshot shows the S&P Capital IQ Investment Research interface. The 'Quick Search' tab is active. The search criteria section includes fields for Symbol / Name, Keyword, Tips, Report Type (set to All Types), Date Range (set to Last 30 Days), and Analyst. There are also checkboxes for 'Primary Symbol Only' and 'Search Headline Only'. Below the search criteria, there are filters for 'Contributors' (set to Default) and 'Product Type' (set to All Research). A search button is located at the bottom right of the search criteria section. Below the search criteria, there is a summary of search results: 'All Research (224,686)', 'Models (46)', 'Fixed Income (6,705)', 'Economics (10,271)', and 'Strategy (40,758)'. A table of results is displayed, showing columns for Contributor, Analyst, Date/Time, Company, Headline, Type, and Pages. The first result is for Edison Investment Research, Analyst: Jeans, Richard, Date/Time: 06:28 AM, Company: SOG, Headline: Returns to organic growth, cash flow jumps, Type: Reports, Pages: 3.

## Advanced search

You can also build up a search using the ADVANCED SEARCH tab. This provides a large number of selectable options, including GEOGRAPHES, INDUSTRIES, LANGUAGES, etc.

The screenshot shows the S&P Capital IQ Advanced Search interface. The 'Advanced Search' tab is active. The search criteria section includes fields for Start from (Choose Saved Search...), Search for (Search Companies, Indices, Lists (or Paste Tickers/IQ IDs / CUSIPs / ISINs from Excel)), and checkboxes for 'Primary symbol only' and 'Export Tickers Clear'. Below the search criteria, there are sections for 'Keywords' (Search by: Individual Fields, Entire Document), 'Date Range' (Last 30 Days, From: To: (mm/dd/yyyy)), 'Include Partial Access' (Yes, No), 'Product Type' (All Research), and 'Industries' (Energy, Materials, Industrials, Consumer Discretionary, Consumer Staples). There are also buttons for 'Search' and 'Clear', and a 'Mapping' section with SIC and NAICS options.