Go to the library portal page at https://myportal.walshcollege.edu/: click on the Library tab, then on Databases. Select FIS Mergent Online: Company Data from the list of databases.

Click the Enter Mergent Online box on the left of the screen. Select company name, ticker symbol, or CUSIP from the Identifier box. Click the company name: Ford Motor Co.

BASIC SEARCH – Find financial information on specific companies

SEARCH RESULTS PAGE
Each report includes the 8 major headings, some of which open into sub-headings or sub-pages in a row below the selected tab.

- **Company Details**
  - **Synopsis** – Directory information, SIC, NAICs, PE Ratio, Web site, business summary, key executives, Ticker symbol, auditor, closing stock prices, etc
  - **Highlights** – financial highlights, profitability ratios, debt segment, asset management, stock price and valuation, liquidity indicators
  - **Joint Ventures** – List of joint venture agreements the company has made
  - **History** – important dates in the company history
  - **Business** – list of the company’s primary/secondary NAICS and SIC codes and a description of the business
  - **Property** – list of property owned by the company
  - **Subsidiaries** – list of the company’s subsidiaries
  - **Long Term Debt** – summary list of company debts: debt summary, securitized debt, and rating changes
  - **Executives** – list of executive officers and directors
  - **Capital Stock** – issue details, stock splits, voting rights, dividends paid

- **Company Financials** – reported annual balance sheet with sections on Segments, As Reported, Generated, Restated, and Preliminary Annual Income Statements, as well as profitability Ratios and Analysis

- **Create Reports** – Create 3 kinds of customized reports using criteria you select

- **EDGAR** – Filings for the previous 90 days including 10-K, 8-K, 10 Q, forms 4, 15, S-8,

- **News** – Recent news headlines

- **Annual Reports** – annual reports for the currently selected company dating back 6 years (pdf format)

- **TearSheets** – Click on the FactSheets link for a one page company profile with a chart in pdf format

- **Research** – includes ◆ **Earnings Estimates** - an analysis of the estimates that have made by brokers of the likely future EPS values for the company; ◆ **Institutional Holdings** – Institutional ownership summary and list of institutional holders with rankings; ◆ **Insider Holdings** – Insider buyers and sellers
FIS Mergent Online: Easy Search for Companies by Industrial Classification:

SIC, NAICS, or MIC (Mergent’s Industrial Classification)

Select the radio button and enter an SIC or NAICS code.

The code look up feature is available.

To search a range of codes you can use an asterisk or use the first 2 numbers of the code:
Example: 37* or 37 in the Code box
Search several codes by entering an or; for example: 3711 or 3714

Choose an index or leave the default, any

Add a country search, if desired

SIC CLASSIFICATION
Click on the + box to expand the contents
0 + AGRICULTURE, FORESTRY, & FISHING
1 + MINING & CONSTRUCTION
2 + MANUFACTURING (CODES 20-29 OUT OF 20-39)
3 + MANUFACTURING (codes 30-39 out of 20-39)
4 + TRANSPORTATION, COMMUNICATION & UTILITIES
5 + WHOLESALE & RETAIL TRADE
6 + FINANCE, INSURANCE & REAL ESTATE
7 + SERVICES (Codes 70-79 OUT OF 70-89)
8 + SERVICES (Codes 80-89 out of 70-89)
9 + PUBLIC ADMINISTRATION & NON-CLASSIFIABLE

You will get a list of companies based on your search criteria:

Create a company analysis list by entering check marks before the company name or add the entire list of companies

Click on a company link to go to its report

NAICS CLASSIFICATION
Click the + box to expand the contents
11 + Agriculture, Forestry, Fishing, Hunting
21 + Mining
22 + Utilities
23 + Construction
31 + Manufacturing (31-33)
32 + Manufacturing
42 + Wholesale Trade
44 + Retail Trade
45 + Retail Trade
48-49 + Transportation and Warehousing
51 + Information
52 + Real Estate and Rental and Leasing
54 + Professional, Scientific & Technical Management of Companies & Enterprises
56 + Administrative and Support & Waste Management & Remediation Services
61 + Educational Services
62+ Health Care and Social Assistance
71 + Arts, Entertainment, & Recreation
72 + Accommodation & Food Services
81 + Other Services
92+ Public Administration
CREATE REPORTS with FIS Mergent Online

Three reports can be built:
- **Custom report** – select individual pages that make up the report
- **Pre-defined Report** – select one or more ready built report formats from the list
- **Company Comparison Report** – create a report that compares a selected company against the industry or the company against a selected group of companies

**CUSTOM REPORTS (MULTIPLE COMPANY REPORTS)**

You must have done a classification or advanced search and created a Company Analysis List. After doing a Classification search, select one of these two options: Click here to add the currently selected companies or Click here to add all the companies from this search. The Company Analysis List will display the number of companies you selected. Click expand from the Company Analysis List and choose Multiple Company Report.

1. In the Company Details box, check company details you want to include; Synopsis, Financial Highlights, History, Joint Ventures, Business, Property, Subsidiaries, Long Term Debt, Executives, Capital Stock.
2. In the Research & News box, check the boxes for pages to include: Historic News, Institutional Holdings, Insider Holdings.
3. In the Financial Statements section, check the boxes for the type of financials you wish to include: Income Statement, Balance Sheet, Retained Earnings, Cash Flows, Profitability Ratios, Business Segmentation, Geographics Segmentation.
4. From Type, choose the default As Reported or Segments, Prelims, Generated, Restated.
5. For Frequency choose Annuals or Quarters.
6. In Currency select As Reported Currency or the currency of another country.
7. In the Scale box, choose As reported Scale, No Scale, In Thousands, In Millions, In Billions.
8. Select from the Period box: Past Year/quarters Last 2 years/quarters, Last 3 years/quarters, Last 5 years/quarters, Last 10 years/quarters, Last 15 years/quarters. If you choose years select 2004-1997.
9. Click Add This Financial Item. The Report Contents box will display your selections.
10. Click Create Company Report (when you have one company selected) or Create Multiple Report (when you have 2 or more companies selected (not shown)).
11. Choose from the following format options:
   - **PDF format** (Requires Adobe Acrobat Reader)
   - **Microsoft Word format** (Word 2000 or above)
   - **Microsoft Excel format**
   - **Html format**
Create COMPARISON REPORTS in FIS Mergent Online

Two comparison reports are available: comparison with a custom group or comparison with the industry average.

Custom Group Comparison

For the custom group, you must have done a classification or advanced search and created a Company Analysis List. After you have selected a list of companies for the report, click expand; then select Comparison Reports.

To compare one company to the industry, see the directions at the bottom of this page.

Categories / Sub-Categories

Corporate Information
- Address
- Email Address
- Auditor
- Fax number
- Legal Counsel
- MIC
- NAICS Codes
- SIC Codes
- State of Incorporation
- Country of Incorporation
- State/Province
- Stock Exchange
- No. of Employees
- Region
- Shareholders
- Ticker
- Transfer Agent
- Web Site
- Year Incorporated/Founded
- Telephone
- Zip Code

Financials
- Current liabilities
- EBITDA
- Inc. from Continuing Operations
- Cash Flow from Operations
- Long-term Debt
- Net Income
- Operating Income
- Stockholders Equity
- Total Assets
- Total Liabilities
- Total Revenue

Ratios
- Current Ratio
- Quick Ratio
- Debt/Total assets
- EBITDA of Revenue
- Effective Tax Rate
- gross Margin
- Interest coverage
- Long-term Debt/Equity
- Operating Margin
- Pre-Tax Margin
- Profit Margin
- Return on Assets (ROA)
- Return on Equity (ROE)
- Revenue/Total Assets
- Revenues/Working Capital
- Total Liabilities/Equity
- Working Capital/Total Assets

Industry Comparison: Comparing a Company against the Industry

After a basic search of one company, click the company name link; click the Create Reports Tab; then choose Comparison Reports/ Compare Company Against Industry. Click the name of the company: For example: Ford Motor Company.

- Under Peer Group Selection, choose the Classification: NAIC, SIC, MIC; under Scope, choose Worldwide or Target Country (USA).
- Choose the Top 10, 25, 50 companies, All Companies, or the Bottom 10, 25, 50 companies.
- Click Create Report to generate the report.

Selecting Compare Company Against Custom Group yields the same screen that you see at the top of this page.
Below are the types of pre-defined reports available to you through Mergent Online. After doing a basic company search, click Create Reports/Pre-Defined Reports.

Select the format of your choice to view a single report for printing or to download.

- **Full Company Report**
  - Available formats: 
  - Full company report with textual and five years & quarters of financial statements. An abridged version of Detailed Company report. Includes all the quantitative and qualitative five years & quarters of financials statements “as-reported” financials

- **Detailed Company Report**
  - Available formats: 
  - Report includes all the quantitative and qualitative five years & quarters of financial statements. Includes the basic company information, business descriptions, officers, directors, recent news, company history, business segmentations, financial highlights, joint ventures, and property.

- **Company Overview Report**
  - Available formats: 
  - Report includes the basic company information, business descriptions, officers, directors, company history, earnings estimates, business and geographic segmentations, financial highlights, stock pricing summary, subsidiaries, joint ventures, and property.

- **Financial Overview Report**
  - Available formats: 
  - Report includes three years of quantitative “as-reported” data that includes the basic company information, the financial statements (balance sheets, income statements and cash flow statement, if available in US Dollars as default for US companies and in their native currency for non-US companies).

- **Detailed Financials Report**
  - Available formats: 
  - Five years of quantitative "as-reported" data that includes the basic company information, the financial statements (balance sheets, income statements and cash flow statement, if available in US Dollars as default for US companies and in their native currency for non-US companies)

- **Financial Analysis Report**
  - Available formats: 
  - Two years and two quarters comparisons of quantitative analysis data that includes the basic company information and the financial analysis reports (income statement analysis with currency conversion, balance sheet analysis with currency conversion and ratio analysis if available in US Dollars as default for US companies and in their native currency for non-US companies)

To perform batch printing or downloading on the currently selected company or the Company Analysis List (available in MS Word or PDF formats), select the desired reports and click below as appropriate:

- **Batch Reporting - Currently selected company**
- **Batch Reporting - Company Analysis List**

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