Library Hours
Fall/Winter/Spring Terms
Mon - Thurs  8:30 a.m.- 10:30 p.m.
Friday    8:30 a.m. -   5:00 p.m.
Saturday  8:30 a.m. -   5:00 p.m.
Sunday    Noon – 5:00 p.m.

Circulation Periods
   Renewable by Phone
Books - 4 weeks
For Use in Library Only:
   Journals
   Reference Books
   Tax Materials
   Class Reserves

Overdue Fines:
   Four day grace period
   First day thereafter, $1.25
   Books $.25 / day
   Annual reports $.25 / day

Reserve Items:
   Four minute grace period
   First minute thereafter, $1.25
   $.25 per minute

FIN 416
Library Services

Reference Service
Reference librarians are available to help students formulate research strategies using both print and electronic resources. Students may call (248) 823-1228, visit the library for reference help, or email questions to librarian@walshcollege.edu.

Library Orientations
Every semester the librarians offer tailored classroom presentations demonstrating the online databases. Instructors initiate the arrangements for these orientations.

MeLCat  Michigan Electronic Library
Students and faculty can use MeLCat to borrow books from other libraries. MeLCat is a resource-sharing service that lets library patrons search for, locate, and request materials from a single, comprehensive online catalog that includes the holdings of other libraries around the state. MeLCat provides access to millions of items, including books, audio books, music, movies, and other library materials. The Walsh College Library, however, does not borrow or lend DVDs, CDs, or audio visual materials through MeLCat. To order a book through MeLCat go to http://elibrary.mel.org/search. Most books arrive within a week or less.

DALNET Reciprocal Borrowing
Patrons can now request items from other local area academic libraries, through their Walsh online catalog and have them delivered to their library by using the DALNET Get It Local feature of the online catalog. When you have done a search on the shared catalog system and don’t see an item you want, you can click the DALNET Get It Local button which takes you to the shared catalog. Select the item you want, and click the Request a copy link. Enter your library card number to complete the transaction. Books will be delivered to Walsh.

Borrowing from Other Academic Libraries Using Michicard
Students can request a Michicard sticker to be placed on their Walsh library card; see http://michigan.gov/michicard for a list of participating public and academic libraries. Students may also go directly to one of the participating DALNET libraries with which Walsh College Library has worked out reciprocal borrowing privileges. Students must return borrowed materials at a time set by the lending library. You will be asked to present a drivers license and a Walsh class registration receipt as proof that you are a currently enrolled student. Check with a librarian for more information.

Interlibrary Loan – Using the Web/Portal Pages—Books Outside Michigan
Books and articles not owned by Walsh College Library can be borrowed through Interlibrary Loan. Before requesting a loan, a student should seek the assistance of a reference librarian to make sure all Walsh Library resources have been checked for the needed item. Faculty and currently enrolled students may request ILL via the library web page. For more information on ILL, visit the library, call (248) 823-1337, or check the Interlibrary Loan web page at http://www.walshcollege.edu/interlibraryloan or select the Interlibrary Loan link under the Library tab in the college portal.

Reserve Materials
Reserve materials that instructors place on reserve for students are stored at the circulation desk and may be checked out for two hours.

Copy Machines
The library has two black and white copy machines which work only with copy cards which can be purchased and reused by adding additional money to them using the card dispenser machine.

Study Area
Study tables are located by the windows on the north and south sections of the library, as well as at back of the library behind the reference collection.
Library Links:

Find Articles
On-Campus Databases: Search the library's databases from on campus
Off-Campus Databases: Search the library's databases from off campus
Find electronic journals: Find a journal in the library's databases
Find print journals: Find a print magazine or journal in the library collection
Inter-library loan: Request an article from another library

Research Guides – Access tailored web pages arranged by topic to help you make the best use of library resources.

Find Books
Library Catalog: Find books in the library catalog
E-books: Electronic books accessible from any computer
MeLCat: Find and request books in Michigan academic and public libraries
Other Library Catalogs: Find books in Metro Detroit area libraries
WorldCat: Search a catalog of libraries worldwide
Inter-library loan: Request a book from another library

About the Library – Learn about library collection and services and access contact information.

Ask a Librarian – Email your question to a reference librarian for help
Financial Information Research Guides at http://researchguides.walshcollege.edu/finance is a collection of library print and electronic resources important to finance students. The guide includes tutorials and a list of databases to meet your research needs for company, industry, and investment information. You can also access the guides by going to the portal page; under the Library tab select Databases; and then click on the Research Guides link from the navigation menu on the left. Select the Finance link and choose any of the tabs for more information under that tab:

- FAQs
- Tutorials
- Finance Databases
- Company Information
- Company Web Sites
- Industry Information
- Investment Information
- Economics Web Sites
- Newspapers
- Business Plans & Startups
- Business Ethics
- International Business
- Course Guides
- Citing in APA Style
- Demographics and Statistics
- Michigan Demographics
- New Books
- Using Social Media
- Using MeLCat
The following online databases are available for research 24/7:

<table>
<thead>
<tr>
<th>Database</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ABI/Inform Complete: ProQuest</strong></td>
<td>Full text articles on global business and management topics.</td>
</tr>
<tr>
<td><strong>Accounting &amp; Tax</strong></td>
<td>As part of the ProQuest ABI/Inform Complete database, it includes full text articles on current accounting and tax topics.</td>
</tr>
<tr>
<td><strong>ArchiveGrid</strong></td>
<td>Includes historical documents, personal papers, and family histories held in museums, libraries, and archives around the world.</td>
</tr>
<tr>
<td><strong>ArticleFirst</strong></td>
<td>Index of articles from the table of contents of magazines and journals.</td>
</tr>
<tr>
<td><strong>LexisNexis Academic</strong></td>
<td>Full text articles including transcripts and congressional hearings, as well as company reports.</td>
</tr>
<tr>
<td><strong>Academic OneFile: Gale</strong></td>
<td>Full text academic journals covering the social sciences, education, humanities, psychology, medicine, science, and criminal justice.</td>
</tr>
<tr>
<td><strong>Business Insights</strong></td>
<td>Full text articles from 1980 to the present with information on companies, markets and industries, market trends, mergers and acquisitions, management theory.</td>
</tr>
<tr>
<td><strong>BNA Accounting Portfolios</strong></td>
<td>Full text explanation and analysis of accounting topics.</td>
</tr>
<tr>
<td><strong>BNA Tax Management Portfolios</strong></td>
<td>Topic-driven analysis for researching and analyzing state and federal tax topics.</td>
</tr>
<tr>
<td><strong>CCH IntelliConnect</strong></td>
<td>Full text federal and state tax literature.</td>
</tr>
<tr>
<td><strong>Checkpoint Accounting, Audit &amp; Corp Finance: RIA</strong></td>
<td>Professional Standards, Audit &amp; Accounting Guides, AICPA Other Alerts, Technical Practice Aids</td>
</tr>
<tr>
<td><strong>Communications &amp; Mass Media Collection</strong></td>
<td>This collection provides current information from more than 100 journals focused on all aspects of the communications field. Key subjects covered include: advertising and public relations, literature and writing, linguistics, and many more.</td>
</tr>
<tr>
<td><strong>Computer Database</strong></td>
<td>Computer-related product introductions, news and reviews in areas such as hardware, software, electronics, engineering, communications and the application of technology.</td>
</tr>
<tr>
<td><strong>CountryWatch</strong></td>
<td>Detailed country reports with political, economic, investment, social, and environmental overviews.</td>
</tr>
<tr>
<td><strong>Credo Reference</strong></td>
<td>Online access to business dictionaries and encyclopedias.</td>
</tr>
<tr>
<td><strong>D&amp;B Million Dollar Database</strong></td>
<td>Information on over 1,300,000 U.S. leading public and private businesses.</td>
</tr>
<tr>
<td><strong>Dissertations and Theses</strong></td>
<td>Database of all dissertations and theses available in WorldCat, an online library of books and other materials in libraries worldwide.</td>
</tr>
<tr>
<td><strong>EBSCO Business Source Elite</strong></td>
<td>Full text from top management, marketing, economic magazines and journals.</td>
</tr>
<tr>
<td><strong>EBSCO Regional Business News</strong></td>
<td>Incorporates 75 business journals, newspapers and newswires covering all metropolitan and rural areas within the United States.</td>
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<tr>
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</tr>
<tr>
<td><strong>Environmental Studies &amp; Policy</strong></td>
<td>Covering the field of environmental issues and policy, this collection, which includes nearly 200 journals, provides instant access to the multiple viewpoints of this volatile field of study, including perspectives from the scientific community, governmental policy makers, as well as corporate interests</td>
</tr>
<tr>
<td><strong>E-Journals</strong></td>
<td>The database locates full-text articles published in the library databases.</td>
</tr>
<tr>
<td><strong>ERIC</strong></td>
<td>Journal articles and reports in education (mostly full text)</td>
</tr>
<tr>
<td><strong>Euromonitor Passport Markets</strong></td>
<td>Market research reports on international consumer, industrial, &amp; service markets.</td>
</tr>
<tr>
<td><strong>Expanded Academic ASAP: Gale</strong></td>
<td>Full text of journals, magazines, and newspapers covering the arts and humanities, social sciences, science and technology</td>
</tr>
<tr>
<td><strong>FACTIVA</strong></td>
<td>Business news, company financial statements, industry ratios, business web links</td>
</tr>
<tr>
<td><strong>First Research</strong></td>
<td>Industry information on small businesses</td>
</tr>
<tr>
<td><strong>FirstSearch/WorldCat</strong></td>
<td>The OCLC online catalog contains 40 million records describing books and materials owned by libraries around the world.</td>
</tr>
<tr>
<td><strong>Faulkner Advisory for IT Studies (FAITS)</strong></td>
<td>Technology reports, tutorials, marketplace overviews product guides, company profiles, and directories</td>
</tr>
<tr>
<td><strong>Faulkner's Security Management Practices</strong></td>
<td>Provides reports on critical management issues for those charged with providing enterprise-wide security</td>
</tr>
<tr>
<td><strong>FIS Mergent Online: Company Data</strong></td>
<td>Financial information on US and International companies including annual reports</td>
</tr>
<tr>
<td><strong>Gale Virtual Reference</strong></td>
<td>Access to <em>Business Plans Handbook</em>, vol. 11, and the <em>Encyclopedia of American Industries</em></td>
</tr>
<tr>
<td><strong>General Business File ASAP: Gale</strong></td>
<td>Full text investment reports; news and articles on companies, industries, and products</td>
</tr>
<tr>
<td><strong>General OneFile: Gale</strong></td>
<td>News and periodical articles on a wide range of topics: business, computers, current events, economics, education, environmental issues, health care, hobbies, humanities, law, literature and art, politics, science, etc.</td>
</tr>
<tr>
<td><strong>General Reference Center Gold: Gale</strong></td>
<td>Full text articles on general business topics</td>
</tr>
<tr>
<td><strong>GPO Monthly Catalog</strong></td>
<td>Index only (no full text) for U.S. government documents (Congressional reports, hearings, debates, judiciary materials.</td>
</tr>
<tr>
<td><strong>Health Ref Center Academic: Gale</strong></td>
<td>Full text articles on fitness, medicine, and health designed for academic libraries.</td>
</tr>
<tr>
<td><strong>Health and Wellness Resource Center</strong></td>
<td>Includes health/medical journals, reference books, &amp; over 700 health-related videos; it is designed for students, patients, health professionals</td>
</tr>
<tr>
<td><strong>InfoTrac Newsstand</strong></td>
<td>A collection of thousands of full text international, national, state, and local newspapers</td>
</tr>
<tr>
<td><strong>Gale Professional Collection</strong></td>
<td>Full text journals covering educational topics</td>
</tr>
<tr>
<td><strong>Insurance &amp; Liability Collection</strong></td>
<td>This collection covering environmental issues and policy includes nearly 200 journals which provide multiple viewpoints, including perspectives from the scientific community, governmental policy makers, as well as corporate interests</td>
</tr>
<tr>
<td>Database Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Internet Encyclopedia</td>
<td>3 volume online encyclopedia of computer terms and computer related articles</td>
</tr>
<tr>
<td>JSTOR</td>
<td>Full text articles covering business, economics, finance, management, and statistics.</td>
</tr>
<tr>
<td>LearningExpress Library</td>
<td>Interactive online learning platform of academic and licensing/certification practice tests, elementary level testing for math and reading. Includes a section that takes users from job assessment to success on the job.</td>
</tr>
<tr>
<td>LegalTrac (Gale)</td>
<td>Articles in all major law reviews, law journals, specialty law and bar association journals, and legal newspapers</td>
</tr>
<tr>
<td>Library Catalog</td>
<td>Online catalog of books held by Walsh and other college libraries in the area.</td>
</tr>
<tr>
<td>Military &amp; Intelligence</td>
<td>A custom collection of over 400 journals, covering all aspects of the past and current state of military affairs. Key subjects include socioeconomic effects of war, governmental policies, the structure of armed forces, etc.</td>
</tr>
<tr>
<td>Morningstar Investment Research Center</td>
<td>Access financial information on thousands of mutual funds.</td>
</tr>
<tr>
<td>OAItster</td>
<td>Catalog of digital resources including books, articles, and multimedia.</td>
</tr>
<tr>
<td>OECD</td>
<td>Access to the OECD Economic Outlook and OECD Economic Surveys</td>
</tr>
<tr>
<td>Opposing Viewpoints in Context</td>
<td>Full text viewpoint articles, topic overviews, full-text magazines, academic journals, news articles, primary source documents, statistics, images, videos, audio files and links to websites on today’s hottest social issues.</td>
</tr>
<tr>
<td>Psychology Collection</td>
<td>This collection gives individuals a basic understanding of the study of the mind, emotions and how the human mind develops and diminishes over time.</td>
</tr>
<tr>
<td>Small Business Collection</td>
<td>This database provides insights, tips, strategies and success stories about entrepreneurship. Users will find 250 subject-appropriate full-text periodicals.</td>
</tr>
<tr>
<td>Small Business Resource Center</td>
<td>Learn how to start, finance or manage your small business. Resources include sample business plans, how to guides, articles and websites.</td>
</tr>
<tr>
<td>Social Science Research Network</td>
<td>SSRN offers advanced research with full text in the social sciences in the areas of accounting, economics, entrepreneurship, finance, health, management, marketing, negotiations, etc.</td>
</tr>
<tr>
<td>Social Sciences Abstracts</td>
<td>Abstracts with some full text of articles on the social sciences; available in the FirstSearch database.</td>
</tr>
<tr>
<td>S &amp; P Net Advantage</td>
<td>U.S. Industry profiles, trends, ratios, and statistics, stock reports, mutual fund information, as well as <em>Industry Global Supplements</em> for Europe, Asia, Latin America</td>
</tr>
<tr>
<td>U.S. History Collection</td>
<td>This collection of over 40 journals provides balanced coverage of both the current thought and events in US History, as well as scholarly work being established in the field; useful both to the novice historian and to the advanced academic researcher.</td>
</tr>
<tr>
<td>Service</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>ValueLine Investment Online</strong></td>
<td>Company financial information on approximately 7500 companies as well as short summaries of over 100 industries.</td>
</tr>
<tr>
<td><strong>Wall Street Journal</strong></td>
<td>Search the current issue or back issues using the Factiva database.</td>
</tr>
<tr>
<td><strong>World History Collection</strong></td>
<td>This collection of over 40 journals provides coverage of both the current thought and events in World History, as well as scholarly work being established in the field; useful both to the novice historian and to the advanced academic researcher</td>
</tr>
<tr>
<td><strong>INTERNET</strong></td>
<td>Internet for educational research via Microsoft Explorer is available at all computer terminals</td>
</tr>
</tbody>
</table>

For remote access to the library database, go to the portal page at [https://myportal.walshcollege.edu/](https://myportal.walshcollege.edu/).

To check on your user name and password students can go to [https://webadvisor.walshcollege.edu/](https://webadvisor.walshcollege.edu/). Students can also contact the Office of Information Technology Help Desk at (248) 823-1350 for any technical problems with their ID and password.

**Printing from Library Computers**

Each term students are given a printing allowance of $24.50. Once that allotment is used up, students will (1) need to add money to their account through the business office or (2) pay for copies with their charge card; click on the PaperCut icon located at the bottom of your screen and fill out the required information. Any money not used during a term will be carried over to the next term. No refunds will be made.

**Research Guides**  [http://researchguides.walshcollege.edu/](http://researchguides.walshcollege.edu/)

The library has prepared subject-specific research guides to help you with research. Currently, the guides cover these subject areas: accounting, APA documentation, communication, doctoral student guide, entrepreneurship, finance, global business information, health care reform, human resources, information assurance, legal resources, labor relations, management, marketing, project management, reading lists, and tax.

**Instructional Handouts**

Since each database is searched differently, the library provides instructional guide sheets for each database. Students may also obtain instructional handouts for online databases from the library web page at [http://researchguides.walshcollege.edu/](http://researchguides.walshcollege.edu/). For finance-oriented tutorials also select the **Finance** link and then the **Tutorials tab**.

The librarians also encourage students to ask for assistance in learning how to search the electronic databases.

NB 12
An Easy Way to Search for Full Text Articles in Specific Magazines, Journals, or Newspapers:

The Serial Solutions database allows users to locate which online database indexes the full text of specific magazines, journals, or newspapers. The database can be extremely useful. For example, let’s say you find only the abstract of an article in one database, and it is exactly what you need. You will want to find the full text in another database, but where would you look? Searching every library database would be time-consuming. Serial Solutions solves this problem by providing a database listing magazines, journals, and newspapers, along with the online databases where they can be found.

Go to the portal page at https://myportal.walshcollege.edu, select Databases from under the Library tab. Scroll down and select the E-Journals Available on the Library’s Online Databases link from the list. On-Campus users can access the database by going to http://www.walshcollege.edu/oncampusdatabases and then selecting the same E-Journals link. A screen with alphabetical letters will be displayed. Simply click on the appropriate letter for the magazine, journal, or newspaper you are looking for. The next screen displays all the periodicals alphabetized under that letter. Scroll down and find the publication you are looking for. After each journal title is a list of databases that index that particular magazine, journal, or newspaper. Clicking on one of the links takes you to the search screen of the database indexing the publication you want or to a screen that allows you to search your magazine or journal by title.

Full-text journals, magazines, and newspapers are available in the following databases licensed to Walsh College Library:

- ABI/Inform Complete: ProQuest
- Academic: LexisNexis
- Business Insights: Essentials
- Computer Database
- EBSCO Business Source Elite
- EBSCO Regional Business News
- Expanded Academic ASAP
- FACTIVA
- (Gale) Opposing Viewpoints in Context
- General OneFile
- General Business File ASAP
- General Reference Center Gold
- Health and Wellness Resource Center
- Health Reference Center Gold
- JSTOR
- LegalTrac

To find titles of magazines, journals, and newspapers available in the library in print format, you will need to search the Library's Online Catalog. If the title you want is not available online or at the library, you may use the Library's Interlibrary Loan Services available on the library web page at http://www.walshcollege.edu/interlibraryloan.
Online Library Catalog
http://www.dalnet.lib.mi.us/walsh/

On-campus and remote access to the web-based catalogs of Walsh College Library and other DALNET (Detroit Area Library Network) Libraries.

From the college home page select the Library link. To do a general keyword search you can use the Search the Library Catalog box. For more specific searches, select Find Books from the Library link on the left and then select Library Catalog.

Select the type of search from the drop-down menu of index terms and enter the terms in the search box:
- Title Keyword
- Author Keyword
- Subject Keyword
- Publisher Keyword
- ISBN
- ISSN

SEARCH FIELDS

● Keyword Search
Use keyword searching when you are uncertain about the exact title or the official subject heading, or if you want to enter several search terms.

Examples: leadership
strategic management

Combining Terms in Basic Keyword Searches
Combine keywords using the Boolean operators: and, or, and not
- and managers and forecasting
- or wages or salaries
- not stocks not bonds

Truncation in Keyword Searching
Use the * symbol to retrieve records with plurals, and various forms or spellings of a word
Examples: market* retrieves records with market, markets, marketing, etc.
tax* retrieves records with tax, taxes, taxation

Punctuation
Omit apostrophes, hyphens, commas, capitalization

Examples: accountants handbook
Displays accountant’s handbook or accountants handbook
Title Keyword Search

Finds titles of books and journals owned by Walsh College Library. Type as much of the title as you know. You do not need to type the entire title. Omit initial articles like a, an, and the. A list of all titles in the catalog will display in chronological order beginning with the most recent title.

Example: bankruptcy bomb
Pulls up Seven Steps to a Successful Business Plan.

Author Keyword Search

Searches for all authors with the name you enter; results will be in chronological order unless you select another option from the sort by box.

Example: covey or covey, stephen

Subject Keyword Search

Finds records with the terms you entered in the search field

Examples: employee training
employees—recruiting

Journal/Magazine Keyword Search

Limit your search to magazines, and journals owned by the library

ISBN Search


Example: 9780814415115

Publisher Keyword Search

Example: ppc
or practitioners publishing company

MeLCat Michigan Electronic Library Catalog

http://elibrary.mel.org/search

MeLCat is a resource-sharing service that lets library patrons search for, locate, and request books from a single, comprehensive online catalog that includes the holdings of other Michigan libraries around the state. Students can go to the web site and request a book; it will usually arrive within a week.

File (Library Catalog 2012)

DALNET Reciprocal Borrowing

Patrons can now request items from other local area academic libraries, through their Walsh online catalog and have them delivered to their library by using the DALNET Get It Local feature of the online catalog. When you have done a search on the shared catalog system and don’t see an item you want, you can click the DALNET Get It Local button which takes you to the shared catalog. Select the item you want, and click the Request a copy link. Enter your library card number to complete the transaction. Books will be delivered to Walsh.

MICHCARD

Walsh College participates in a statewide library card program, Michicard. Over 300 public and academic libraries in Michigan participate in Michicard. For more information, go to http://michigan.gov/michicard. Patrons obtain a Michicard sticker to be attached to their local library card from their home library. The patron, not the home library, is responsible for returning borrowed items. A directory of participating libraries can be found at the Michicard web site at https://mdoe.state.mi.us/isapi/4disapi.dll/directory/search.html.

RECIPROCAL BORROWING

Walsh College has arranged reciprocal borrowing privileges for students at the following academic libraries through the Detroit Area Library Network and beyond:

- College for Creative Studies
- Detroit Public Library (M)
- Eastern Michigan University (M)
- Lawrence Tech University
- Macomb Community College
- Madonna University
- Marygrove College (M)
- Michigan State University (M)
- Oakland Community College
- Oakland University
- Rochester College
- Schoolcraft College (M)
- Troy Public Library
- University of Detroit Mercy
- University of Michigan-Dearborn
- University of Windsor
- Wayne County Community College
- Wayne State University, (M)

*Colleges with an (M) require Michicard.

If you plan to go directly to another academic library, you should always call ahead to double-check on their borrowing requirements, as these may change. The Walsh Library can also get books for you through interlibrary loan, but you need to allow 10 days or even two weeks for items borrowed from outside the state. See the Interlibrary page at http://www.walshcollege.edu/interlibraryloan
INVESTMENT RESEARCH

GENERAL REFERENCE:
For general reference, the following titles contain terminology, statistics and commentary on stocks, bonds, mutual funds, and other investment instruments as well as the economic outlook.

*The Irwin Business and Investment Almanac* (REF HF 5003.D68a)
World economies, economic indicators, and historical statistics on market averages, mutual fund performance, bonds, real estate and collectibles.

*Dow Jones-Irwin Guide to Using the Wall Street Journal* (REF HB 3743 .L44)
How-to guide to using information contained in the *Wall Street Journal* for investment analysis.

A general guide to investment information and advice for mutual funds, stocks, bonds, futures, options, and commodities.

Considered an investment Bible that analyzes securities and provides a guide to investment decisions.

*Illustrated Encyclopedia of the Securities Industry* (REF HG 4513 .P463)
Alphabetically organized by key word and cross-referenced, this reference work defines concepts and terms and explains financial statements and annual reports.

*Dictionary of Investing* (REF HG 4513 .R67)
Dictionary of investment terminology.

General Investment theory and advice.

*One Hundred and One Years on Wall Street: An Investor’s Almanac* (REF HG 4572 .B74)
Statistical reference of Wall Street performance.

Up to 30 years of per-share data for all industry groups in the S & P 500 composite index and up to 6 years of detailed financial data on each of 67 industry groups in the S & P 400 Industrials Index.

*(Standard and Poor’s) Outlook* (REF HG 4501.O88); also online through S&P Net Advantage
Analysis of stock/bond market and general economic trends, with investment recommendations by objective, i.e. growth, equity, etc.

General investment theory.

INVESTING IN BONDS:

NOTE: Moody’s Investors Services has sold many print products to Mergent FIS; expect to see gradual title changes.

*Mergent Bond Record* (REF HG 4905 .M78)
Ratings of Corporate, Municipal, government and convertible bonds along with interest dates, call price and date, current price, yield to maturity, date issued and current year high and low.

*Mergent Bond Survey* (REF HG 4905 .M785)
Describes recent and prospective offerings of domestic and foreign bonds, commercial paper, preferred stock. Includes Moody’s ratings and averages.

Annual coverage of over 14,000 bond-issuing municipalities and government agencies. Includes assets, growth, revenues, tax collection, debt, property assessments, tax rates, operating revenues, population.
**INVESTING IN STOCKS:**

*Dow Jones Averages 1885-1980* (REF HG 4915 .D64)
A historical look at Dow Jones stock market averages from 1885 to 1980.

*Dow Jones Guide to the World Stock Market* (REF HG 4661.D68)
Market overview and company information.

*Encyclopedia of Technical Market Indicators* (REF HG 4915 .C56)
Forecasting values of over 110 stock market indicators.

*Mergent’s Handbook of Internet Stocks.* (REF HG 4501 .H37 1999)
Business and financial profiles of 200 Internet companies with description of the company’s business, stock performance, detailed financials, and web address.

*Latin American Companies Handbook* (REF HG 4091.5 L356)
Provides information on Latin American Stock Exchange and companies.

*Mergent’s Annual Dividend Record/Mergent Dividend Record (new title)* (REF HG 4537 .M66)
Full year dividend summaries on over 10,000 dividend-paying common and preferred stocks and 3600 mutual funds. Includes dividend amount, dates, totals, splits, tax information.

*Mergent’s Handbook of Common Stocks* (REF HG 4051 .M59)
A quarterly overview and evaluation of 950 leading New York Stock Exchange stocks, plus operating and stock performance data such as capitalization, debt, dividends, percentage average yield, etc.

*Mergent’s Industrial Manual* (REF HG 4961 .M67)
*Mergent’s OTC Industrial Manual* (REF HG 4961 .M7237)
*Mergent’s OTC Unlisted Manual* (REF HG 4907 .M68)
*Mergent’s Transportation Manual* (REF HG 4971 .M74)

All of the above Mergent volumes contain operating and financial data on leading industrial and transportation companies--financial history, capital structure, dividends, earnings, splits, executive officers, and mergers. **FIS Online** provides company data for U.S. companies and U.S.-based foreign companies in 100 countries worldwide via the Web.

*Mergent’s Handbook of Dividend Achievers* (REF HG 4050 .M66)
Tracks stocks which consistently pay out dividends.

*NASD Manual* (REF HG 4921 .N3)
General information on the NASDAQ.

*NASDAQ Handbook* (REF HG 4551 .N37)
Explains the NASDAQ system in detail.

Bibliography of readings and information sources on the New York Stock Exchange.

*SBBI Yearbook Stocks, Bonds, Bills and Inflation* (REF HG 4501 .S7949)
Ibbotson Associates market result tabulations and analyses covering the years 1926 - 2000.

*Standard & Poor’s Quarterly Dividend Record* (REF HG 4908 .S765); also available online in S&P Net Advantage
Quarterly dividends paid out by NYSE, ASE, and OTC listed companies.

*Standard & Poor’s Security Owners Stock Guide* (REF HG 4915 .S67); also available online through S&P Net Advantage
Monthly background data on thousands of stocks presented in a convenient summary format with a separate section on mutual funds.
*Standard & Poor's Stock Reports* (REF HG 4905 .S44); Also Available online from **S & P Net Advantage**. Company profiles and financial statistics regarding activities of stocks listed on the NYSE, ASE, and OTC boards.

**INVESTING IN MUTUAL FUNDS:**

**Best of the Best Mutual Funds** (REF HHG 4530 .C445)
Features the top 64 heavy hitter funds

**CDA Mutual Fund Report** (REF HG 4930 .C21)
Analyzes the performance risk and lists the percentile rankings of over 1000 funds.

**Standard and Poor's Mutual Funds** (available online through S&P Net Advantage)
Statistical data on over 1500 mutual funds. Includes the NAV, total assets, objectives, yield, volatility, rank, capital gains and holdings. Ceased publication as of May 1997.

**Mutual Fund Encyclopedia** (REF HG 4530 .P432)
Mutual funds ranked by objectives 1992-1993

**Barron's Weekly - Report on Mutual Funds** (in periodicals)
Dow Jones Business and Financial Weekly.

**OTHER INVESTMENTS:**

**Handbook of Fixed Income Securities** (REF HG 4651 .H265)
Information on Treasury, Corporate and Municipal bonds, mortgage backed securities, futures, options, swaps and caps/floors.

**Annuities, Mutual Funds, and Life Insurance as Investment Products** (REF HG 8790 .A56)
A non-technical treatment of investment products written from the customer's point of view.

**All About Annuities** (REF HG 8790 .W55)
Explanation of what annuities are, who uses them, which varieties are offered, as well as the track record of 20 annuities.

* Starred items are books Mr. Gardner considers essential for Fin 416 research.

**ELECTRONIC DATABASES:**

Walsh College Library offers electronic database collections that are suited to investment research. All databases are available remotely.

**FACTIVA**
Factiva provides global business news, company financials, and business-related web sites.

**LexisNexis ACADEMIC**

**Academic** has snapshot company reports; use the Get Company Information and search by company name or ticker symbol. You can also use the Company tab on the left and search for annual reports and company profiles.

<table>
<thead>
<tr>
<th>Company Overview</th>
<th>Lists of SIC/NAICs numbers</th>
<th>Competitors</th>
<th>Links to SEC reports</th>
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<th>Brands</th>
<th>Reports from Hoovers, Worldscope, &amp; S&amp;P, &amp; more</th>
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<tr>
<td>News items</td>
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<td>Annual Reports</td>
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</tbody>
</table>

For annual reports use the company tab and then select the annual reports from the source box.

**S & P NET ADVANTAGE**

**Net Advantage**, the online version of S & P's Industry Surveys, expands the library's collection of web-based investment-oriented databases. It is comprised of a number of databases:
INDUSTRY SURVEYS
Provides detailed coverage of 52 major U.S. industries and covers:

- **Current Environment** - A review of recent developments and forecast of emerging trends
- **Industry Profile** - Major players and market share data, market developments, the raw materials situation, the labor environment and regulatory trends
- **Information on How the Industry Operates** - The business/economic cycles, competitive environment, distribution, regulation and legislation
- **Key Ratios and Statistics** - A listing and discussion of the key ratios and statistical measures of the industry's health
- **Useful Suggestions** - how to evaluate the profitability of a company in a specific industry
- **Comparative Company Analysis** - Tables giving historical financial data, including revenues and income, profitability ratios and important balance sheet ratios for leading companies in each industry

The service also includes *Monthly Investment Review*, which tracks the investment performance and prospects of 115 industries each month.

CORPORATION RECORDS
Provides in-depth financial information on approximately 12,000 publicly held U.S. and Canadian corporations, as well as 821 foreign corporations. There are two categories of searches available: Public Companies (the default) and Closed-End Funds.

REGISTER
Includes two databases:
- **Register of Corporations**: Directory of over 100,000 public and privately held companies, including address/phone, sales, employees, business descriptions, SIC/NAICS codes, stock exchanges (public companies), marketing areas, bank/accounting/law firms, and names of over 400,000 executives.
- **Register of Directors & Executives**: Brief biographical profiles on over 70,000 executives, including primary and secondary business affiliations, departments and positions, business and home addresses, educational background, fraternal organizations, and birth information.

STOCK REPORTS (including Closed-End Funds)
Access to facts, figures, analysis and projections for approximately 5,500 publicly held U.S. corporations. The basic report for each company includes the latest share price and current year’s range, P/E ratio, current dividend and yield, and S&P’s proprietary earnings and dividend rankings. It also provides a stock chart showing six to seven years of monthly stock price ranges and trading volume, as well as a ten-year summary of important per-share data, statistical tables of income and balance sheet data and quarterly breakouts of net sales.

STOCK GUIDE
Profiles over 11,000 common and preferred stocks—listed and NASDAQ. Coverage includes 250 warrants, 200 convertible preferred stocks, 475 closed end funds, and 700 mutual funds.

EARNINGS GUIDE
Delivers earnings information for approximately 5,000 publicly traded stocks. This includes the following:
- Wall Street consensus earnings estimates for the current quarter, current year, and following year
- S&P’s proprietary Earnings and Dividend Rankings
- P/E ratio
- 5-year growth rate
- Cash flow
- Book value
- Revenues

THE OUTLOOK
Provides analyses of stock market trends in newsletter format and offers and investment policy dating back to 1996. Individual stocks are discussed and recommendations are made to meet a variety of investment objectives. The Outlook offers STARS, S&P’s Stock Appreciation Ranking System, which ranks over 1,000 stocks on a short-term buy/hold/sell basis. The database is searchable by company name, ticker symbol, or CUSIP. In addition to articles on industries and the economy, you will find the “Supervised Master List of Recommended Issues,” a selection of stocks kept under continuous supervision. “In the Limelight” projects the effects of recent developments on short- and long-term values of selected stocks. “Market Forecast & Investment Policy” gives a capsule forecast of how a range of forces will affect stocks and bonds.
DIVIDEND RECORDS
The database covers over 20,000 issues and is updated quarterly. Reports are available for each issue and cover dividend payments, stock splits and stock dividends, rights distributions, and other capital changes.

MUTUAL FUND REPORTS
Profiles over 11,000 mutual funds, following both small and large funds equity and fixed income funds both load and no-load. Searches can be generated using over 100 search fields. Reports contain both statistical data and important investment information including:
- Performance during previous bull and bear markets;
- Best and worst historical performance;
- Quarter-by-quarter results for the last six years;
- Key profile statistics including Sharpe Ratio, R2, Alpha, and Beta;
- 10 years of key historical data;
- Graphical representations of trends and statistics;
- Investment objective;
- Fund performance against its peers and the Market;
- Information on the portfolio composition, including sectors, asset types, holdings and more.

THE BOND GUIDE
The Guide provides information on over 12,000 corporate, convertible, and foreign bonds. The data is searchable for the previous 12 month period. There are 3 searchable databases with the Bond Guide: 1 Corporate by Issue: Convertible, 2 Corporate by Issue: Non-convertible, and 3 Foreign Bonds.

FIRST RESEARCH INDUSTRY PROFILES
The database offers a guide to over 900 industry segments updated quarterly; the summaries include information on trends and factors affecting the industry:

Business Insights: Essentials
Access company information, market share reports, business rankings, SWOT analyses, magazine articles on company news, and more.

GENERAL BUSINESS FILE ASAP
This database provides information on practical business issues, the latest in business theory, investment analysts’ reports on major companies and industries, and timely news on products, industries and executives.

FIS Mergent ONLINE: COMPANY FINANCIAL INFORMATION
Mergent Online provides company financial information for over 11,000 U.S. public companies listed on the NYSE, AMEX, and NASDAQ exchanges, as well as over 17,000 non-U.S.-based companies in 100 countries worldwide. Each report for U.S. companies includes the company’s history, business, property, subsidiaries, officers, directors, long term debt, bond ratings, capital stock, income statement, balance sheets, statements of cash flow, exchange and ticker symbol, directory information, annual stock price ranges, trustees, stock splits, and dividend payment history. The coverage of international companies currently includes information on a company’s history, business property, subsidiaries, officers, directors, long term debt, capital stock, annual income statement, and annual balance sheet. Reports for both the domestic and international companies include annual reports, usually for the previous three years.

FIS Mergent WebReports
The database contains the archive of the entire collection of Moody’s Manuals.

Morningstar Investment Research Center
- Comprehensive financial information on New York Stock Exchange, American Stock Exchange, and NASDAQ stocks
- Information on thousands of mutual funds, including the Morningstar star rating
- Financial information on hundreds of exchange-traded funds with up-to-date information on returns, reports, and Morningstar ratings
- Portfolio tools to help you determine your asset mix
VALUE LINE INVESTMENT SURVEY
The online is available at both campus libraries and from home with your email password. The database provides stock reports and short industry profiles.

OTHER ONLINE DATABASES FOR RESEARCH

EBSCO Business Source Elite, with its Company Profiles, provides a SWOT analysis for many companies. Searchers can also find company and business related articles.

Another database for business research is General Reference Center Gold, which provides full text articles on general business topics.

ProQuest ABI/Inform Complete includes full text articles on U.S. and international business and management topics.

LIBRARY WEB PAGE

Go to the Walsh College Portal, select the Research Guides link, and then the Finance link for useful investment-related sites, as well as company and industry information.

NB Fin 403, 416
ProQuest ABI/Inform Complete

Search worldwide business periodicals for information on advertising, marketing, economics, human resources, finance, taxation, computers and information on over 60,000 companies.

**Basic Search Screen**

- **Enter keywords**
- **Click to activate the search**
- **Access search tips**
- **Go to the Advanced Search Screen**

**Operators**

- Finds articles with both terms
- or – Finds articles with one or both terms
- not – finds the first term and excludes the second
- Quotation marks - Searches for the exact phrase

**Results Screen**

- **ProQuest highlights your keywords**
- **ProQuest suggests other subjects to search**
- **View APA citation**
- **Preview abstract or summary of the article**
- **Sort by Relevance**
  - Date (oldest first)
  - Date (most recent first)

**Narrow Results by Source Types:**

- Scholarly Journals
- Magazines
- Newspapers
- Trade Journals
- Wire Feeds
- Reports
- Dissertations & Theses
- Conferences & Proceedings
- Other Sources

**Additional Ways to Narrow Results**

- Publication Title
- Document Type (article, news, feature, general information, report, industry report, commentary)
- Keyword
- Subject
- Classification
- Co/org
- Location
- Person
- Language
- Date
**Fields from the drop-down menu**

- **Keyfields + text** – Search in the text of the article and in the abstract, author, document text, document title, subject fields.
- **Citation/abstract** – CAB Search for keywords in the citation and abstract.
- **Abstract AB** – Search for keywords in the abstract of articles
- **Author AU** – Search for a specific author
- **Document Text FT** – Search for keywords in the body of the article
- **Document Title TI** – Search for keywords in the title of the article.
- **Publication Title PUB** – Search for keywords in the titles of periodicals
- **Subject heading (all)** – Search for subject keywords from a controlled list
- **Tags – TAG** – Label documents with keywords to share or use for later searching.
- **Classification – CC** 4 digit numbers that let you target search by topic, industry or market, geographical area, or article type
- **Co/Org ORG** – Search for a company or organization
- **Location – LOC** – Search for a specific geographic area or location
- **NAICS- NAICS** – Search for articles on a specific industry
- **Person PER** – Search for articles about a specific person
- **Product Name NP** – Find articles about a specific product

**Viewing Formats:**

- **Full Text** gives you the citation, abstract, and full text only of the article with no graphics
- **Citation/Abstract** – view the summary and citation for the article
- **Full Text PDF** gives you the pdf file for the article as originally published.
**Additional Actions:**

- **Save** - save articles and documents
- **Email** – email articles to yourself or group member
- **Tags** - access tags that have been assigned a document. Tags are relevant words or phrases given to items in ProQuest to help you organize your research and classify items. You can share your tags with other users or keep them private using My Research, and follow existing tags to find related material. You can add as many tags to a document as you want.

**Other Types of Advanced Search**

- **Command Line** - This feature is best for expert searchers who want to use command line syntax like `ti(social entrepreneurship)` or `au(spear, roger)`.

- **Find Similar** – Enter or paste text from a document to find similar items. Limit search to full text or scholarly journals. Display options by Relevance, Date (oldest first), or Date (most recent first)

- **Look Up Citation** - Use when you want to find a document and have incomplete information such as only the title or only the author (or ISSN, ISBN, date, date range, document ID). You can also use this feature to make sure you have an entry in your bibliography correct.

- **Obituaries** – Search obituaries, death notices in newspapers. Look up a deceased person and also search for names of relatives, occupations, hobbies, location of death, or other personal information.

ProQuest suggests other subjects to search

View images, charts, and maps found within the results

Mark records for later viewing
1. Click the **Publications** link at the top of the screen.

2. Select from the menu:
   - In title (default)
   - Title begins with
   - In publication summary
   - In subject

3. Enter the publication title in the search box

4. You can also choose from an alphabetical list

Next Screen

You can enter keywords to search just this publication

5. Click the + sign to display the issues under those years

6. For example, click on the + in front of 2010-2011 and again on the + in front of 2010 to display the contents under 2010; then select the month and issue of your choice.
ProQuest ABI/Inform Complete

Alerts and RSS Feeds

Create new content alerts to be sent to you by email. If you are researching a topic for an extended period of time, you might want to set up an email alert or an RSS feed so that you will automatically be notified of new articles on your subject of research.

**Setting up an Email Alert:**

After you retrieve your search results, select the **Set up alert** link at the top of the screen.

![Image showing the set up alert interface with options to receive alerts daily, weekly, monthly or quarterly, and to stop alerts in two weeks or up to one year.]

Not shown: Select HTML or text-only format to receive your email.

![Image showing a message that your alert has been created.]

You will get a message that your alert has been created.
Setting up an RSS Feed

An RSS feed for your current search, or for a publication title, serves the same purpose as an alert. Your RSS feed lets you know when new documents (or issues) are available in ProQuest. However, an RSS feed gives you more flexibility of access. Instead of only being delivered by email, you can integrate your RSS feed into an RSS reader or into a Web page. When you create an RSS feed, ProQuest provides you with a link that you can add to an RSS reader—such as the one built into Microsoft Outlook—or integrate into your own Web page or a Web page at your institution. Clicking the link at any time will display the most current matching search results, or the most current issue’s contents.

Click on the Create RSS feed link at the top of the search results screen.

The next screen tells you that your feed has been created. It will expire in 3 months if it is not accessed. You can also delete the feed at this screen if you change your mind.

You can view and manage all of your RSS Feeds when you are signed into your My Research account. First you need to create an account by selecting the My Research account button.
Business Insights: Essentials combines sophisticated research tools with convenient access to a range of comprehensive learning materials. Designed to move researchers quickly to higher levels of understanding and application, Business Insights: Essentials uses statistical data sources, news articles, academic journals and topical reference materials organized by company and industry to quickly engage users in the global business environment.

General Navigation

On the homepage, you will find the following options for beginning your research:

- Basic Search
- Advanced Search

Below the name of the database, you will find the menu bar with additional options:

- Home
- Company Finder: Develop lists of key competitors by industry or location and sort them according to revenue and other metrics.
- Industries: Browse a list of industries.
- Compare Companies: Generate statistics for a single company or compare multiple companies.
- Compare Industries: Generate statistics for a single industry or compare multiple industries.
- Saved Items: Collect documents during your research that interest you! Documents you have saved or “starred” can be found here.
- Search History: Keep track of the last 20 searches you have performed.
- Glossary: Displays a list of business terms and definitions.

Getting Started with a Basic Search

To perform a Basic Search, enter a company, industry, topic or other search terms in the search box found on the home page. A basic search box will also be located in the upper right hand corner on most pages.

Note: Information is organized contextually around company and industry. Your basic search will look for a Company or Industry Profile that matches your search terms and display those results first, along with any news, case studies, market share reports and other types of content found.
**Sorting Your Search Results**

Your results are listed in the order shown in the Sort By drop-down list.

- **Publication Date**: Sorts by publication date with the most recent documents displayed first.
- **Article Title**: Sorts alphabetically by document title.
- **Publication Title**: Sorts alphabetically by the title of the source publication.
- **Relevance**: Sorts by how closely documents match your search query.

**Filtering Search Results by Content Type**

The content types found are listed in the left-hand margin. The number shown in parentheses equals the number of results found for that content type. Click a content type link to view only those results. Depending on your search criteria, below is a list of content types you may see:

- **Recent News**: Articles from hundreds of international newspapers and news wires, updated daily.
- **Journals**: A wide variety of scholarly periodicals that contain full-text articles, updated daily.
- **Company Histories**: Provides detailed corporate chronologies and histories.
- **SWOT Reports**: Strengths, Weaknesses, Opportunities and Threats (SWOT) analyses on hundreds of global companies.
- **Market Share Reports**: Full-text reports showing various company rankings within their industry and market share.
- **Market Research Reports**: Full-text reports on most industries from Datamonitor International.

**Searching Within Search Results**

Below the list of content types, you will find a Search within Results box. Enter a term and hit Enter to search within your current results.

**Limit Search Results By Publication Title**

Depending on the search performed and the results found, the system may present additional ways to filter your results (displayed below the Search within Results box). For example, the publication titles that make up your search results may be listed. The number shown in parentheses equals the number of results found for that title. Click a title link to view only those results.

**Related Subjects**

Selecting a Related Subject link performs a Subject search on the selected term.
Viewing, Listening, and Translating a Document

- **View**: Clicking on the document title from the search results page takes you to the full content of the record, be it a case study, company profile, news article or other type of content.

- **Listen**: Whenever the Listen icon is present, you can have the content on that page read out loud by a computer-generated voice.

- **Translate**: Select a language from the Translate drop-down list. The system will generate a translation of the current document in the language you selected.

Document Tools

Document tools are provided in the upper right corner of the document view box. Below is a list of available tools:

- **Save**: Saves documents to your current session under Saved Items (on the top menu bar).
- **Print Preview**: Reformats the current page for printing.
- **Generate PDF**: Creates a PDF view of your document.
- **Citation Tool**: Generates bibliographic citations based on the format of your choice.

**Share**: Includes sharing via Bookmark URL, Email, and Social Media Sites

- **Bookmark**: Lets you create a stable and persistent URL that you and others can use to retrieve the content you are viewing.
- **Social Media**: Use a social media site or online bookmarking service to share a link to the content you are currently viewing.
- **Email**: You can e-mail content you find to yourself and others.

Using the Advanced Search

Do you know the title of the document you are looking for, or its author? Or perhaps you want to search for materials published within a certain date range from a publication. Go to the Advanced Search page by clicking the Advanced Search link found below the search box in the page banner. There are 3 general ways to do an Advanced Search:

1. Enter your search terms and select an index from the drop-down list.
2. Enter your search terms, select an index from the drop-down list, and enter one or more search limiters.
3. Perform a limiters-only search without entering any search terms.

Using the Subject Guide Search

The Subject Guide Search can be accessed from within the Advanced Search to browse a dynamic list of topics, people, products, organizations and more. Enter your subject term of interest and find results grouped by the closest available matches from our business subject index. You can select a term to view a results list of matching items, or continue navigating through the Subject Guide by expanding terms and viewing related topics.
Full text coverage for more than 1,100 scholarly business, management and economics journals, including nearly 500 peer-reviewed publications.
Offers indexing and abstracts for nearly 1,800 journals.
Includes full text (PDF) coverage dating back as far as 1985, and detailed company profiles for 10,000 companies.

Get a list of searchable fields
Enter keywords with field codes
Retrieve articles with full text
Search for articles in a specific publication
Limit searches to scholarly articles only
Limit by date

SEARCHABLE FIELDS
Click on Field Codes to get a list of available codes to help you narrow your search

AU Keyword search for author: Ex: AU Manry, David
CO Company keyword search: Ex: CO Microsoft
TI Title keyword search: Ex: TI sexual harassment
SU keyword search of the thesaurus, subject headings, companies, products, people, and author-supplied keywords: Ex: SU wall street

AB Abstract: keyword search
Ex: AB tax reform

People Keyword search of people’s names:
Ex: PE buffett, warren

PS Reviews & Products: Ex: PS dell dimension 8200

SO Publication Name: Ex: SO time

TK Ticker Symbol: Ex: TK AMZN
TX keyword search of all searchable fields
Ex: TX data warehousing

Limit Search by Document Type:
abstract, article, bibliography, book review, case study, directory, editorial, entertainment review, erratum, interview, letter, literature review, obituary, poem, poetry review, proceeding, product review, recipe, short story, speech
Proximity Searches
N near operator
Tax N5 reform
Finds tax within 5 words of reform in any order
W within operator
Tax w8 reform
Tax is within 8 words of the term reform in that order

Truncation
* finds root words
comput* finds computer(s), computing
? replace an unknown character
ne?t find results containing neat, nest, next

Search Results can be limited to the following:
- All Results
- Academic Journals
- Trade Publications
- Magazines

Viewing Formats
- HTML Full Text
- PDF Full Text

Delivery Options
- Print: Click the print icon; click OK.
- Save: Click the save icon, save in 3 ½ Floppy (A:), name the file; click Save.
- Email: Enter email address and subject

USEFUL TABS/LINKS
- Basic Search - Simplest search option available
- Advanced Search – More complex search option
- Visual Search – use interactive graphics (block or column style) to conduct a search
- Keyword - Start an interactive search
- Choose Database Go to the menu of EBSCO databases
- Publications Go to an alphabetical list of magazines and journal titles indexed in the database
- Thesaurus – Browse a list of available subject headings
- Indexes (under More) – Narrow results to fields such as author, company entity, journal name, NAICS Code, ticker symbol, year of publication, etc.
- Company Profiles -view Datamonitor company reports
- Images – Access over 180,000 images relating to people, natural science, places, history and flags
- Refine Search –Choose search criteria to narrow your search
- Search History/Alerts – Save, retrieve, and reuse your advanced searches
- Result List – View or return to search results
- Find similar results- find articles on the same topic.
- Sort by- sort search results by date, source, author, relevance

Cite: View the APA citation for the article
NB10
Business Source Elite/Company Profiles

Full text coverage for more than 1,100 scholarly business, management and economics journals, including nearly 500 peer-reviewed publications.

Offers indexing and abstracts for nearly 1,800 journals.


Includes full text (PDF) coverage dating back as far as 1985, and detailed company profiles for the world’s 5,000 largest companies.

1. Click on the Company Profiles tab
2. Enter the name of the company
3. The results screen brings up a PDF Report with Location/Industry category. Click on the PDF link.

**Delivery Options**

- **Print**
  - Click the print icon; click OK.

- **Save**
  - Click the save icon, save in 3 ½ Floppy (A:\), name the file; click Save.

- **E-mail**
  - Enter email address and subject.
Company Information

Access detailed information on over 20,000 publicly traded companies in 72 countries

How to Access:

① From the portal page click the Library tab, then Databases; scroll down and select the Factiva link.
② From the Get Company Snapshot drop-down menu, select Company Name or Ticker and enter a company name or ticker symbol in the search box.
③ Click the button to activate the search.

■ Snapshot Screen (shown below in part)
Contact Information - company address, telephone, fax, web site
Business Description - brief statement on the company’s business
Peer Group: Key competitors – major competitors for your company
Key executives; Key Financials SIC/NAIC industry Classification
Stock Price Activity chart Performance/Segment information with charts
Company News

■ News
Latest headlines from newspapers, magazines, blogs, Web sites, Multimedia sources

■ Financial Results - Download to Spreadsheet Format
Balance Sheet
Cash Flow - Annual
Income Statement - Annual
Key Ratios – relative valuations, financial strength, profitability, effectiveness, efficiency
Reports

Company Report - A detailed outline of this company's primary activities, top officers and executives, competition, history, products, services, key financial ratios, and full balance sheet, income statement and cash flow statements.

Detailed Company Profile Report - A detailed outline of this company's primary activities, top officers and executives, competition, history, products, services, and key financial ratios.

Custom Report – Build a custom report by selecting the criteria from 3 topics: Business Summary, Financials and Market Activity, and News. See the next page for more information.

Financial Health - A summary of the company's financial health with the latest key indicators, margins, valuation and effectiveness ratios, and share and dividend activity data.

Ratio Comparison - Compares key financial ratios of this company against its industry, sector, and the S&P 500 Index aggregates

Custom Report - Create a report with criteria you choose: Access under Reports or click the Custom Report link.

Business Summary
Peer Comparison
Datamonitor Overview and History
Datamonitor Products and Services
Reuters Extended Business Description
Industry Classification
Datamonitor Company Statement
Datamonitor SWOT Analysis

Financials & Market Activity
Performance/Segment Information
Key ratios
Financial Health
Business Segment Breakdown
Ratio Comparison Report
Balance Sheet – Annual
Cash Flow – Annual
Income Statement – Annual
Balance Sheet – Interim/Quarterly
Cash Flow – Interim/Quarterly
Income Statement – Interim/Quarterly

News
Latest News
Performance
Bankruptcy
Management Moves
Contracts/Orders
New Products/Services
Legal/Judicial
Ownership Changes
Press Releases
Trade Articles
Capacities/Facilities
Earnings

USEFUL LINKS

Quotes – Current and historical stock quotes going back two years
Charting – Enter a ticker symbol or symbols up to 10 to create a chart based on the available options
Company – Return to the search Screen
Company Report [PDF] – Quickly access the company’s comprehensive report

Useful Icons

Print Results
Reformat text for printing using your browser

Save Results
Reformat text for saving as html or .txt

Email Your Results
Email up to 100 documents
First Research Industry Profiles

Industry Profiles offer a guide to over 900 industry segments updated quarterly; the summaries include information on trends and factors affecting the industry:

- Competitive landscape
- Products, operations, technology
- Sales and marketing
- Finance and regulation
- Regional & International issues
- Human Resources
- Industry employment growth
- Recent developments
- Quarterly industry updates
- Business challenges
- Trends and opportunities
- Executive insight
- Call prep questions – suggested questions to consider
- Financial information
- Industry forecast
- Industry drivers

The database offers a variety of ways to search for industry profiles. See numbers, 1, 2, 3.

1. Enter the SIC, NAICS, or name of the industry in the search box at the top of the screen if you know it.
2. Quick search for industries by keyword, SIC Code, or NAICS Code.
3. Click to display industry segments.
4. View the latest updates.

Click the Browse Industry Profiles link. Enter SIC code, NAICS code or keywords; for example: sic 3711, naics 33611, or the keywords, automobile manufacturing.

You can also browse an alphabetical list of industry profiles.

You can also click on the blue boxes before a sector to expand the list of profiles in it.

Available sectors:
- Construction and real estate
- Government, Education, Recreation
- Finance & Insurance
- Retail
- Food & Agriculture
- Services
- Healthcare
- Manufacturing
- Technology and Communications
- Transportation, Energy, Storage
- Wholesale
NAVIGATION TABS:

- **Industries: Your Starting Place**
  Find industry profiles for over 900 industries.

- **North American Regional Information**
  Select a state or Canadian province to access concise industry statistics, employment data, real estate information, and web resources.

- **Sales & Marketing: Customize Communication**
  Access sample templates so you can customize your communication to customers in email, voicemails, and prospect letters.

- **Industry Prospector**
  Rank industries based on key economic and financial metrics. Drill down into industries that best fit your research needs. Industry Prospector gives you the power to select and rank industries based on 34 financial metrics, 2 human resources metrics, 7 industry drivers, forecasted growth, and international trade growth and dollars. Use the following search metrics to find business opportunities and identify risks:
  - **Financial Metrics** – 34 metrics derived from income statements, balance sheets, and financial ratios
  - **HR Metrics** - Employment growth and average worker wages.
  - **Industry Drivers** - 7 industry drivers that have a positive or negative economic impact on an industry
  - **Forecast** - Predicted industry growth for the next two years.
  - **International Trade** - U.S. imports & exports in total $ annual value and % growth

- **International Global Content**
  - Access a list of Canadian industry profiles.
  - Read international news.
  - View top industries for US imports.
  - Explore global web links.
  - Access international acronyms.

OTHER OPTIONS

- **Call Prep Questions**
  Call Prep Sheets are one-page “Executive Summaries” designed to give you strategic insight into your prospect's business issues before you pick up the telephone. Call Prep Sheets are located as a link within of each of our Industry Profiles covering 900 industry segments available to you through your First Research subscription. Just click on the “View Call Prep Sheet” button at the bottom of the Industry Profile chapter list to dig in.

- **MP3 Podcasts** (Located on the bottom of the Industries page under Intelligence On the Go)
  Listen or download industry profiles. Each five-minute podcast provides a quick industry overview.

- **Self-Paced Training Sessions** (under the Tools and Resources heading on the Industry page)
  View detailed modules with search tips on how to make maximum use of the database.
Walsh College Library   FIS Mergent Online

U.S. Company Data – Financial information on over 25,000 U.S. public companies (active & inactive)
International Company Data – Financial information for over 20,000 non-U.S. companies
U.S. Annual Reports – Current and historical annual reports on 40,000 U.S. public companies
International Annual Reports – current annual reports on over 75,000 non-U.S. companies
Country Profiles - Country statistical data and map (includes GDP)

◆ 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. Enter the company name or ticker symbol. A list will display.

BASIC COMPANY SEARCH

Select one or more of the databases to search

As you enter the company name or ticker symbol, a list of choices will display. Click on the appropriate choice.

USEFUL TABS:
- **Company Details:**
  - *Synopsis* – Directory information, business summary, SIC, NAICs, key executives, key financials, company news
  - *Highlights* – Financial highlights including income statement, balance sheet, cash flow, liquidity indicators, etc.
  - *History* – Important dates in the history of the company
  - *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 the company debts
  - *Capital Stock* – issue details, stock splits, voting rights, dividends paid
  - *Business Segments* – business analysis of revenues and earnings before taxes, as well as geographic analysis
- **Executives** – Individual executive details on the company’s officers and directors, including biographies, compensation, committees, and executive insider trading
- **Ownership** – Institutional and insider holdings on the specific company
- **Company Financials** – Historical as reported and standardized financials, as well as ratios, restated financials, prelims, and business analysis. Financials go as far back as 15 years and can be downloaded to a spreadsheet.
- **Filings** – Government documents filed by the company
- **Reports** – View and/or download company annual reports (back to 1995), industry reports, buy/sell/hold reports, and Mergent pre-defined reports which includes a Full Company Report, Company Details Report, Financial Details Report, and Executives Report.
- **Filings** – Government documents filed by the company
- **News** – Recent updated company news stories, including joint ventures
- **Competitors** – View and/or create company competitors based on industry codes and financial highlights; included are news items about your selected company, as well as its competitors.
FIS Mergent Online: Easy Search for Companies by Industrial Classification:
(SIC, NAICS, or MIC (Mergent’s Industrial Classification))

Use Code Lookup

SIC CLASSIFICATION
Click on the + box to expand the contents. Drill down to the specific code you need.
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.

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

Click on a company link to go directly to its report
REPORT BUILDER with FIS Mergent Online

Three reports can be built:

- **Custom report** – select criteria from a list to include in the report
- **Report Wizard or Pre-defined Reports** – Drag, drop, and reorder icons (Company Description, Executive Compensation, Subsidiaries, Financials, Insider Transactions, Institutional Holdings, History, 3 Year of End of Day) and place in the Report Preview box.
- **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

Select from the List of 5 categories by clicking the + sign to expand a list of subcategories:

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company Details</strong></td>
<td>Synopsis, Financial Highlights, Property, Subsidiaries, Long Term Debt, Capital Structure, Earnings Estimates, Business Segment</td>
</tr>
<tr>
<td><strong>Pricing Information</strong></td>
<td>Closing Price, Dividend yield, EPS, DPS, Market Cap, 52 Week Range, PE Ratio, Price Change %</td>
</tr>
<tr>
<td><strong>Company Financials</strong></td>
<td>Type (Prelims, As Reported, Restated), Frequency (Annuals, Quarters), Currency (As reported or choose foreign currency), Scale (As reported, no scale, in thousands, in millions, in billions), Select Period (Past Year, Last 2, 3, 5, 10, or 15 Years/Quarters), Years (present – 1997), Income Statement, Balance Sheet, Cash Flows, Ratios</td>
</tr>
<tr>
<td><strong>Executives</strong></td>
<td>Officers, Directors, Committees, Compensation, Insider Holdings, Insider Trades</td>
</tr>
<tr>
<td><strong>News</strong></td>
<td>Recent News, History, Joint Ventures, Business, Corporate Events</td>
</tr>
</tbody>
</table>

Click on the item(s) you want in the report and click on the > to add the item(s) you want. Click < to remove the item from the report. Choose >> to automatically add all available data to the report.

Select the format for the report: HTML, Word, Excel, PDF. Click the Create Company Report button.
**Report Builder Comparison Reports: Compare Company Against the Industry**

Create reports which compare your currently selected company against a number of competitors within the same industry.

Click on the **Report Builder** tab. Select the **Comparison Reports** link.

**3 Data Items to Select from**

<table>
<thead>
<tr>
<th>Corporate Information</th>
<th>Address, Email Address, CIK, 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</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financials</td>
<td>Advertising, Current liabilities, Current Assets, Current Liabilities, Earnings before Tax, EBITDA, Inventories, Net Interest (Banks), Net Loans and Leases (Banks), Net Property Plant &amp; Equipment, R&amp;D, Selling General and Admin, Total Deposits (Banks only), Cash Flow from Operations, Long-term Debt, Net Income, Operating Income, Stockholders Equity, Total Assets, Total Liabilities, Total Revenue</td>
</tr>
<tr>
<td>Ratios</td>
<td>Advertising % TR, Calculated Tax Rate %, Current Ratio, Earnings Before Tax Margin %, EBITDA Margin %, Gross Margin %, Interest Coverage, Inventories % TA, Inventory Turnover, Loans to Deposits (Banks Only), Long-term Debt/Equity, Loss Ratio % (Insurance Only), LT Debt to Equity, Net Current Assets % TA, Net Interest Margin % (Banks only), Net PPE % TA, Net PPE Turnover, Net Profit Margin %, Operating Margin %, Quick Ratio, R&amp;D % TR, Revenue per Employee, ROA % (Net), ROE % (Net), ROI % (Operating), Selling Gen &amp; Admin % TR, Total Asset Turnover, Total Debt to Equity</td>
</tr>
</tbody>
</table>
Comparison Reports: Compare Company Against a Custom Group

You have to create a list of companies before you can build this report. One way is to go to the competitors tab and click on the companies you want. When you select a company, in the quick intro at the top of the page you will see the company name followed by a + sign; for example:

**Toyota Motor Corp (NYS: TM)**  to Company Analysis List. Click on the + sign to add the company to your Analysis List. Repeat for all the companies you want in the report. Then click on My Mergent Tools+/Company Analysis List.

Select from the Data Items:

**Corporate Information** – Directory information, NAIC codes, SIC codes, ticker, state of incorporation

**Financials** - Advertising, Cash Flow from Operations, Current Assets, Current Liabilities, Earnings Before Tax, EBITDA, Inventories, Long Term Debt, Net Income, Net Interest (Banks Only), Net Loans & Leases (Banks Only), Net Property Plant & Equip, Operating Income, Research & Development, Selling General & Admin, Stockholders Equity, Total Assets, Total Deposits (Banks Only), Total Liabilities, Total Revenue

**Ratios** - Advertising % TR, Calculated Tax Rate %, Current Ratio, Earnings Before Tax Margin %, EBITDA Margin %, Gross Margin %, Interest Coverage, Inventories % TA, Inventory Turnover, Loans to Deposits (Banks Only), Long-term Debt/Equity, Loss Ratio % (Insurance Only), LT Debt to Equity, Net Current Assets % TA, Net Interest Margin % (Banks Only), Net PPE % TA, Net PPE Turnover, Net Profit Margin %, Operating Margin %, Quick Ratio, R&D % TR, Revenue per Employee, ROA % (Net), ROE % (Net), ROI % (Operating), Selling Gen & Admin % TR, Total Asset Turnover, Total Debt to Equity
FIS Mergent PREDEFINED REPORTS for the Currently Selected Company

There are two types

✓ Predefined Reports: Select Data Items
Click on the Reports tab.
Select the Mergent Reports link.

Four Available Reports:
Click on the + icon next to each of the report titles to expand a list of all of the topics, headings, subheadings, and data covered within the report

◆ Full Company Report: Complete Quantitative and Qualitative Report on the company. All financial data cover the last 3 years.
◆ Company Details Report: Includes all the quantitative and qualitative information on five years of annual & quarterly financial statements
◆ Financial Details Report: Includes five years of quantitative "as-reported" data.
◆ Executives Report: Includes three years of quantitative "as-reported" data

Formats for Viewing Reports:
Word    Excel
PDF     HTML

✓ Second Predefined Report: Click and Drag Icons
Click on the Report Builder tab.
Select the Report Wizard link.
Drag one or more of the icons into the Report Preview Screen. Reorder the icons, if desired.

Available Icons:
Company Description Executive Compensation Subsidiaries
Insider Transactions Institutional Holdings History
Financials
3 Year of End of Day Pricing

The Financials icon has been dragged from the reports on the left to Report Preview on the right
FIS Mergent Multiple Company Reports (Competitors)
You must first do a company search. Then click on the Competitors tab.
Click here to create a competitor report. Click on the X before a company to remove it from the list.
You can also click Add all to company Analyst List.
If you choose this option, click on My Mergent Tools.
Select Company Analyst List.
Select companies in company analyst list by clicking on the company name and then on the > sign.
Select items from the Data Items and click >. Data items include Company Details, Pricing Information, Company Financials, Executives, and News.
Click Create Multiple Company Report.
The report you generate will have all the companies with the selected data items, one after the other.

Create a Company Analysis List Using Basic Search
Click on the + to Company Analysis List link to add a company to your Company Analysis. Use this method when you are comparing companies with different SIC or NAICs numbers.
The link is at the top of the company report after the company name.
Do another basic company search and repeat the procedure to add other companies.
When you finish selecting companies, click on the My Mergent Tools button.
Select Company Analyst Link. The screen shown above will display.

Saving for Later Retrieval
Save your report by clicking on Save Report Template List. 
You will be asked to enter your email address and then a name for your report.
Select Load Report Template to view a template you previously created.

Data Items:
Click the + sign to expand the contents
Company Details
Pricing Information
Company Financials
Executives
News
FIS Mergent Industry Reports

Industry Reports are available for the following industries:

- Automotive
- Aviation
- Banking
- Biotechnology
- Chemicals
- Construction
- Construction - Public Infrastructure
- Consumer Services
- Electricity
- Energy
- Food & Beverage
- Health
- Hospitality & Tourism
- Information Technologies & Communications
- Insurance
- IT & High Technology
- Media
- Medical Instruments
- Metal Works
- Mining
- Non-Precious Metals
- Oil and Gas
- Pharmaceuticals
- Precious Metals
- Property & Development
- Retail
- Retail - General
- Telecommunications
- Textiles

The regions covered are **North America, Asia Pacific, and Europe.**

If you have done a company search, click on the **Reports** tab or if you are at the initial search screen, click on the **Report Search** tab.

Then click on the **Industry Reports** link.

DISPLAY OPTIONS:

**View** link
View opens up an html page with the following information: sector overview, sales, sector performance, leading companies in the industry, mergers, acquisitions & divestments.

**PDF** file
The PDF file opens up a detailed report (over 30 pages) on the automotive industry in North America and covers the current environment, industry profile, market trends and outlook.
STANDARD & POOR’S NET ADVANTAGE is an online database which provides access to S & P’s Industry Surveys, Sub-Industry Reviews, Stock Reports (including closed-end funds), Stock Guide, Earnings Guide, Dividend Records, Bond Guide, Mutual Fund Reports, The Outlook, Security Dealers of North America, Register of Corporations (including private companies), and Register of Executives.

Click on the Companies Tab.

1. Select a publication from the drop-down menu.
2. Search by ticker or company name.
3. Click the Go button.

The next screen displays the Stock Report in pdf file format. Reports are usually 8 pages in length.

Company Profile:
- Overview – Business summary and fact sheet.
- Quote – Current stock quote
- News – Current news headlines about company
- Chart – Stock chart (1 day to 5 years)

Stock Reports
- Statistics
- News Headlines
- Sub-Industry Outlook
- Wall Street Consensus with Analysts’ Recommendations

Vital Statistics
- Valuation – Key stock statistics, per share data, relative standing by calendar year
- Financials – Revenues, EPS, income statement, other financial data
- Corporate Actions – Dividend data, stock splits
- Industry Information – Brief industry information for the company researched
- Competitors (All) – Complete list of competitors for the company researched
- Competitors (Covered by S&P) – Competitors found in the S & P database
- Industry News – News headlines and press releases by date

Stock Reports – View in html or pdf format
**STANDARD & POOR’S NET ADVANTAGE**

**Industries**

**Net Advantage** is an online database which provides access to S & P’s Industry Surveys, Sub-Industry Reviews, Stock Reports (including closed-end funds), Stock Guide, Earnings Guide, Dividend Records, Bond Guide, Mutual Fund Reports, The Outlook, Security Dealers of North America, Register of Corporations (including private companies), and Register of Executives.

- **Industry Surveys** - Provides in-depth economic and business information on 55 major U.S. industries, including trends and key industry ratios and statistics.
- **Sub-Industry Reviews** - Provides a half-page review of 137 industries.
- **Search Industry by Company Name or Ticker** – Use this option if you are unsure what industry or sub-industry your company is in.

**Industry Surveys**

1. Click the **Industries** box at the top of the screen.
2. You will get a list of industries. You can view the report in HTML or PDF format or download to a spreadsheet.
3. Select one of the 55 industries. Choose the HTML or PDF versions.

**55 Industries**

- Advertising
- Aerospace & Defense
- Agribusiness
- Airlines
- Alcoholic Beverages & Tobacco
- Apparel & Footwear
- Autos & Auto Parts
- Banking
- Biotechnology
- Broadcasting Cable
- Chemicals: Basic
- Chemicals: Specialty
- Communications Equipment
- Computers: Software
- Computers, Storage & Peripherals
- Computers: Consumer – Services & the Internet
- Computers: Commercial Services
- Computers: Hardware
- Computers: Networking
- Electric Utilities
- Environmental & Waste Mgmt.
- Financial Services: Diversified
- Foods & Non-Alcoholic Beverages
- Healthcare Facilities
- Healthcare: Managed Care
- Healthcare: Pharmaceuticals
- Healthcare: Products & Supplies
- Homebuilding
- Household Durables
- Household Nondurables
- Industrial Machinery
- Insurance: Life & Health
- Insurance: Property-Casualty
- Investment Services
- Lodging & Gaming
- Metals: Industrial; Metals: Precious
- Movies & Home Entertainment
- Natural Gas: Distribution
- Oil & Gas: Equipment & Services
- Oil & Gas: Production & Mktg.
- Paper & Forest Products
- Publishing & Advertising
- Restaurants
- Retailing: General
- Retailing: Specialty
- Semiconductors
- Semiconductor Equipment
- Supermarkets & Drugstores
- Telecommunications: Wireless
- Telecommunications: Wireline
- Thrifts & Mortgage Finance
- Transportation: Commercial
Sub-Industries
Advertising
Aerospace & Defense
Agricultural Products
Air Freight & Logistics
Airlines
Airport Services
Alternative Carriers
Aluminum
Apparel Retail
Apparel, Accessories & Luxury Goods
Application Software
Asset Management & Custody Banks
Auto Parts & Equipment
Automobile Manufacturers
Automotive Retail
Biototechnology
Brewers
Broadcasting
Building Products
Cable & Satellite
Casinos and Gaming
Catalog Retail
Coal & Consumable Fuels
Commercial Printing
Commodity Chemicals
Communications Equipment
Computer & Electronics Retail
Computer Hardware
Computer Storage and Peripherals
Construction and Engineering
Construction Materials
Construction, Farm Machinery, & Heavy Trucks
Consumer Electronics
Consumer Finance
Data Processing and Outsourced Services
Data Processing Services
Department Stores
Derivatives
Distillers and Vintners
Distributors
Diversified Banks
Diversified Capital Markets
Diversified Chemicals
Diversified Metals and Mining
Diversified Real Estate Activities
Diversified REIT’s
Drug Retail
Education Services
Electric Utilities
Electrical Components & Equipment
Electronic Equipment Manufacturers
Electronic Manufacturing Services
Employment Services
Environmental & Facilities Services
Fertilizers & Agricultural Chemicals
Food Distributors
Food Retail
Footwear
Forest Products
Gas Utilities
General Merchandise Stores
Gold
Health Care Distributors
Health Care Equipment
Health Care Facilities
Health Care Services
Health Care Supplies
Health Care Technology
Heavy Electrical Equipment
Highways & Railtracks
Home Entertainment Software
Home Furnishings
Home Improvement Retail
Homebuilding
Homefurnishing Retail
Hotels, Resorts & Cruise Lines
Household Appliances
Household Products
Housewares & Specialties
HR & Employment Services
Hypermarkets & Super Centers
IT Consulting & Other Services
Industrial Conglomerates
Independent Power Producers & Energy
Industrial Gases
Industrial Machinery
Insurance Brokers
Integrated Oil & Gas
Integrated Telecommunication Services
Internet Retail
Internet Software & Services
Investment Banking & Brokerage
Leisure Facilities
Leisure Products
Life & Health Insurance
Managed Health Care
Marine
Marine Ports & Services
Meat, Poultry & Fish
Metal & Glass Containers
Mortgage REIT’s
Motorcycle Manufacturers
Movies & Entertainment
Multi-Sector Holding
Multi-line Insurance
Office Electronics
Office REIT’s
Office Services & Supplies
Oil & Gas Drilling
Oil & Gas Equipment & Services
Oil & Gas Exploration & Production
Oil & Gas Refining, Marketing, Transportation
Other Diversified Financial Services
Packaged Foods & Meats
Paper Packaging
Paper Products
Personal Products
Pharmaceuticals
Photographic Products
Precious Metals & Minerals
Property & Casualty Insurance
Publishing
Railroads
Real Estate Development
Real Estate Services
Real Estate Operating Companies
Regional Banks
Reinsurance
Restaurants
Retail REITS
Security Alarm Services
Semiconductor Equipment
Semiconductors
Soft Drinks
Specialized Finance
Specialty Chemicals
Specialized Consumer Services
Specialty Stores
Steel
Systems Software
Tech Distributors
Textiles
Thrifts & Mortgage Finance
Tires & Rubber
Tobacco
Trading Companies & Distributors
Trucking
Water Utilities
Wireless Telecommunication Services

Additional Links

Global Industry Reports
Access reports from Europe in Autos & Auto Parts, Banking, Foods & Beverages, Media, Oil & Gas, Pharmaceuticals, Telecommunications, Tobacco; also reports from Asia in Airlines and Telecommunications

Industry Focus
One page analyst commentary on various industries

Stovall’s Sector Watch
Sam Stovall, S&P Chief Investment Strategist, offers his commentary on industry sector information

Economic Insight
Short commentary on some aspect of the economy such as the employment picture, GDP, wholesale prices, and more

Economic Calendar
A list of dates for upcoming economic events

Trends & Projections
An 8 page summary of the economy including charts on retail activity, consumer confidence, consumer finance, interest rates, economic indicators etc.

Printing

It is best to print the pdf version, rather than the html.

- Choose the PDF link.
- Select the print icon in Adobe Acrobat.
- Click OK.

Saving in PDF

- Display the format.
- Click the save icon in the toolbar of Acrobat.
- Enter a file name in the File Name box: For example: restaurants
- Save as type: Acrobat (*.pdf).
- Click Save.
- You must view your document with Adobe Acrobat Reader.

NB 13
Value Line Online: Company & Industry Information

To quickly find a company stock report, click on the Standard Edition, Small & Mid-Cap, or Plus Edition link under Quick Index. The Plus Edition combines the first two editions plus an additional 4,000 reports.

Company Report

After Lookup Company enter either the name of the company or the ticker symbol.

Next choose either the PDF or HTML version.

Click on the company name or the PDF file to bring in a one-page summary of the company’s financials.

Click on the Industry link to display a list of companies in the same industry as your company.

Display the company report in HTML.

Enter company ticker symbol or name; use ticker symbol for the easiest search.

View the Selection & Opinion report.

View the Summary & Index file.

View the Ratings & Reports file.
**Industry Reports** (these vary according to the Edition you selected)

Choose **Lookup Industry** to get a one-page industry report. Click on the pdf icon for the report or click on the name of the industry to get a list of companies in that industry:

Advertising
Aerospace/Defense
Air Transport
Apparel
Auto & Truck
Auto Parts
Bank
Bank (Canadian)
Bank (Foreign)
Bank (Midwest)
Beverage
Biotechnology
Building Materials
Cable TV
Canadian Energy
Cement & Aggregates
Chemical (Basic)
Chemical (Diversified)
Chemical (Specialty)
Coal
Computer Software/SVCS
Computers/Peripherals
Diversified Co
Drug
E-Commerce
Education Services
Electric Util. (Central)
Electric Util. (East)
Electric Util. (West)
Electrical Equipment
Electronics
Entertainment
Entertainment Tech
Environmental
Financial SVCS. (Div.)
Food Processing
Food Wholesalers
Foreign Electronics
Funeral Services
Furn/Home Furnishings
Grocery
Healthcare Information
Heavy Construction
Homebuilding
Hotel/Gaming
Household Products
Human Resources
Industrial Services
Information Svcs
Insurance (Life)
Insurance (Prop/Cas.)
Internet
Investment Co.
Investment Co. (Foreign)
Machinery
Manuf. Housing/RV
Maritime
Medical Services
Medical Supplies
Metal Fabricating
Metals & Mining (Div.)
Natural Gas (Distrib.)
Natural Gas Utility
Newspaper
Oil/Gas Distribution
Oilfield Svcs/Equip
Packaging & Container
Paper/Forest Products
Petroleum (Integrated)
Petroleum Producing
Pharmacy Services
Power
Precious Metals
Precision Instrument
Property Management
Public/Private Equity
Publishing
R.E.I.T.
Railroad
Recreation
Reinsurance
Restaurant
Retail (Special Lines)
Retail Automotive
Retail Building Supply
Retail Store
Securities Brokerage
Semiconductor
Semiconductor Equip.
Shoe
Steel (General)
Steel (Integrated)
Telecom. Equipment
Telecom Services
Thrift
Tobacco
Toiletries/Cosmetics
Trucking
Utility (Foreign)
Water Utility
Wireless Networking

**Survey Issues**

Click on Survey Issues in the left navigation screen to get the following reports:

**Summary and Index** – The front cover contains a Table of Contents, three important market statistics, and a list of all the industries VL follows in alphabetical order with their industry rank relative to the other 90 industries next to the name of the industry. The page number is to the right. The market statistics are found in 3 boxes. The first box (a) has the median of estimated price/earnings ratios of all stocks with earnings covered in The Value Line Investment Survey (around 1,700). The second box (b) shows the median of estimated dividend yields (total dividends expected to be paid in the next 12 months divided by the recent price) of all dividend-paying stocks in the Survey. The third box (c) contains the estimated median price appreciation potential 3 to 5 years into the future for the 1,700 stocks in The Survey, based on VL’s hypothesized economic environment 3-5 years hence. On page 2 you will find an alphabetical listing of all stocks in the publication with references to their location in Ratings and Reports. Information about companies includes: recent stock price, VL’s Timeliness, Safety and Technical Ranks, beta, 3-5 year target price range and % appreciation potential, each stock’s current P/E ratio, each stock’s % estimated yield for the next 12 months, 12 month earnings (6 months historical and 6 months estimated), estimated dividends for the next 12 months, VL’s industry rank, latest earnings and dividend declarations, etc.

Beginning on page 24 there are a list of useful screens : industries in order of timeliness, stocks moving up or down in timeliness rank, timely stocks in timely industries, conservative stocks, highest dividend yielding stocks, stocks with the highest estimated 3 to 5 year price appreciation potential, best and worst performing stocks in the past 13 weeks, stocks with the lowest and highest P/E ratios, stocks with the highest estimated annual total returns (next 3 to 5 years), stocks with the highest projected 3 to 5 year dividend yield, highest growth stocks.

**Ratings and Reports** – This section has one-page reports on approximately 1,700 companies and one or two page reports on over 70 industries. The company reports contain Timeliness, Safety and Technical Ranks, Value Line’s 3 to 5 year forecasts for stock prices, income and balance sheet data, as much as 17 years of historical data, and analysts’ commentaries. There are also stock price charts, quarterly sales,
earnings, and dividend information, etc. Each page is updated every 13 weeks. Important news occurring during these 13 week intervals will be published in a Supplementary Report. Every week, there will be a new edition of Ratings & Reports with approximately 135 company reports grouped by industry and a smaller number of one or two page industry reports. Over a 3 month period, revised reports will be issued on approximately 1,700 companies and over 90 industries.

**Selection and Opinion** - contains the latest economic and stock market commentary and investment advice, along with one or more pages of research on interesting stocks or industries, and a variety of pertinent economic and stock market statistics. It also includes 3 hypothetical stock portfolios (Stocks with above-average year-ahead price potential, stocks for income and potential price appreciation, and stocks with long-term price growth potential).

**Useful Links**


**Flash Tutorials: View this two part tutorial**

[http://www.walshcollege.edu/upload/flash/Library/ValueLinepdfreport/ValueLinepdfreport.swf](http://www.walshcollege.edu/upload/flash/Library/ValueLinepdfreport/ValueLinepdfreport.swf)

[http://www.walshcollege.edu/upload/flash/Library/Valuelinehtml/Valuelinehtml.swf](http://www.walshcollege.edu/upload/flash/Library/Valuelinehtml/Valuelinehtml.swf)

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