



Bloomberg Equities Reference Rev 1.0


Intermediate Bloomberg Reference Sheet: Equities

1. Entering the Equity Section


- Press the yellow <Equity> button on the keyboard (F8).
- Press the green <Go> button.

2. Finding a Security

- Enter the Equity Section.
- Click on “Finding and Creating Securities” or type in “1” and press the <Go> button.
- Click on “Ticker Symbol Look Up” or type “TK” and press <Go>.
- When prompted, type in the name of the issuer of the security you are look for (Ex. Microsoft). Press the <Go> button.

 Short Cut: Put the cursor at the top of any page and enter: <Equity> TK “full or partial name” <Go>

- Select the security you are looking for by clicking on its name. The Ticker will be on the right side of the name (ex. Microsoft Corp Ticker is MSFT US).

 When you search you will most likely see five or more pages of tickers. A great hint is to choose the simplest ticker symbol. You can also look under the help function (Instructions for this function are explained in the beginner course).

- To get to a particular securities page from any other page in Bloomberg you must type the ticker followed by <Equity> and <Go> (ex. MSFT US <Equity> <Go>).

Alternate Route:

- a. Enter the Equity Section (follow steps outlined in 1).
- b. Click on “Finding and Creating Securities”
- c. Click on “Ticker Symbol By Industry” or type “TKI” and press <Go>.
- d. Drill Down by pressing on the “+” icons until you are at the lowest level (ex. Basic Materials, Forest Products&Paper).
- e. Double click on the lowest level industry you are interested in (ex. Forestry)
- f. In a few seconds the symbols of the companies in that industry will appear on the right side of the screen.
- g. Click on any company to find more information about it.

3. Generating a List of Equity Securities Based on a Set of Criteria You Select

- Go through steps a-b in the “Finding a Security” section of this help sheet.
- Click on “Custom Search” or type in QSRC <Go>.
- Bloomberg will only save 20 search criteria sets so if there have already been 20 created you will need to erase one.

To Erase (20 searches in left hand column):

- Click on any of the numbers in the left hand column.
- Click “Delete Current Search”
- Click on “Enter 1 <Go> to delete this search”

If a New Search is Available (less than 20 searches in left hand column):


- On the right side of the screen you will find the “Add New Search” section.
- Click on the type of template you would like to use (ex. Popular Fields Template).

The following is an explanation of the Popular Fields Template.

- Enter your specifications by entering the max and min values in the orange columns on the right of the page (ex. If I wanted to look for securities that had a closing price of between 20 and 30 on the previous day I would type 20 into the min column and 30 into the max column).
- When you are finished enter your search title (in the “Search Title:” box) and click on “1<Go> to save” at the top of the screen. You have now created your search criteria.
- Press <Menu> to go back to Equity Search page.
- Click on the search you created. It will be located in the left hand column.
- Click “Run Current Search” or type 21<Go>
- To download information to Excel, click on “Output Results to”, then “Excel Spreadsheet” and finally “Enter 1 <Go> to download to Excel”. Wait!

4. Retrieving Information on a Particular Security

- From any screen in Bloomberg type in the security ticker and press <Equity> followed by <Go> (MSFT US<Equity><Go>).

 The screen that will appear is the CU Menu for the security you selected. This screen contains links to all the information Bloomberg has available for the selected security. When ever you want to return to the CU Menu type CU at the top of any screen related to the security you are interested in.

Most Requested Information on Equities:**a. Click “Fundamentals & Earnings Analysis”. To get the:**

- *Balance Sheet*: Click on “Balance Sheet”
- *Income Statement*: Click on “Income Statement”
- *Cash Flow Statement*: Click on “Cash Flow Statement”

✂ To download data into Excel: click on Downloads (on the red menu at the top of the page), click excel downloads, click yes when excel opens and wait.

- *Historical Data on P/E ratio*: Click on “P/E Table”
- *Earnings Estimates*: Click on “Earnings Estimates”


b. Click “Historical Prices”. To get the:

- *Graph of the share price of the selected equity over time*: Click on “Px Graph w/Volume” or type GP<Go> at the top of the screen.
- *Chart of the share price of the selected equity over time*: Click on “Px Table w/Avg Daily Volume” or type HP<Go>.
- *Distribution of Returns*: Click on “Historical Return Histogram” or type HRH<Go>.

5. Relative Value Function

Using the RV function you can benchmark your company's performance or capital structure against your industry.

- a. Find the Security you are looking for using the steps listed in number 2 (ex. MSFT US <Equity>)
- b. Enter RV and press <Go>
- c. To see a comparison of Microsoft to the industry:
 - a. Click on Edit in the red tool bar at the top of the page.
 - b. Move the cursor to "Security List"
 - c. Click on "Load by Security Sector"

 For Help with the RV function either ask a lab assistant or go to the RV page and press the green <Help> key at the top of your keyboard.