

Annual report data in Capital IQ & Capital IQ Pro Students Manual

Capital IQ

For Capital IQ, you can retrieve financial results of companies by navigating to *Screening* and selecting *Companies* from the drop-down menu.

S&P Capital IQ	Search	Search Companies, People, Funds, and More							
My Capital IQ Co	ompanies I	Markets	Screening	Charting	Coverage	Projects	Alpha Factors	Structured M	lodels 🕂 🛟
Screening	Idea (Idea Generation			Reporting				
Companies Quick Screener Equities	Companies · Investment Banki Quick Screener · Investment Mana Equities · PE/VC		inking anagement	Screening Reports ent Comparable Analysis		/sis			
Fixed Income	 Corpo 	Corporate Screening Lite New and Newsworthy Credit Ratings			Create - Companies Create - Transactions Create - Fixed Income		ixed Income	Key Devs	O People (
Key Developmen People Transactions	ts · Scree · New : · Credi						uick Screener	Saved Screens	Idea Gener
Projects Projects/Portfolio	• All Id	ea Gener	ation Screens	s		ula	S		
Saved Screens	Targe	ting				- T			
Saved Templates	 Find I Find I 	Find Buyers or Investors Find Limited Partners				Ē	۹ –	Criteria	Display

Among numerous categories, locate *Financial Information* and select the sub-category that aligns most closely with your research objectives.



In each category, there is a multitude of estimators that you can incorporate as criteria for screening companies or for display purposes.

Search Financial Data Items Q	Criteria	Display Rank Aggregates			
Key Financials Market Capitalization					
Market Capitalization					
		Greater Than			
Implied Market Capitalization	Value (\$mm):				
Total Enterprise Value					
TEV, Excl. Operating Leases					
Total Revenue					
Gross Profit	Time Frame:				
EBITDA					
EBIT		O CY ♥ 2022 ♥			
Earnings from Cont. Ops.					
Net Income					
Cash And Equivalents					
Total Cash & ST Investments	Definition:	() EBITDA			
Net Property, Plant & Equipment					
Total Assets					
Total Debt					
Total Equity					
Cash from Ons.					

Ensure to incorporate criteria by clicking the button located in the bottom right corner to include the value in the final file.



Subsequently, click "View Results" on the right to observe all the companies that meet the criteria and their corresponding values for the selected parameters.



Now you have option to export the final table in Excel or Word and continue the work outside of Capital IQ system.

Edit Criteria Return to Screen Builder								
Search:								
Screening Results - Currency: Original Settings Change Export: All Companies V Templates: Go								
	Mord	🖲 🖲 Excel 🛛 Go		🖌 Keep Current Columns	Add/Edit Display Columns			
Save to List Group Results V Functions: Sum/Weight Columns Aggregates								
Search Results Q Clear Where is my Company?								



Choose Companies from the Screener App to view the accessible parameters.



From many categories you can find sub-category of the *Financials*. To view the most important financial statement characteristics, choose Key *Financials*. For other variables you may require *Standard Template* menu.



Capital IQ Pro

data using Capital IQ pro terminal.

Then you can run your screener according to the chosen parameters and export the data table to excel.

