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# Chapter 4

## Adding Companies

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In addition to adding data items, Standard & Poor's Research Insight gives you the flexibility to add a company or set of companies not already included in one of the COMPUSTAT databases. You can also add data values for as many data items as you like to the new company. Once you add a company, you can analyze and compare it to other companies in the database, using all of the analytical tools available in Research Insight.

This chapter covers

- adding your own company
- assigning data values to a company
- deleting a company
- moving a company to another database

## Adding a Company to Research Insight

To add a company to Research Insight you must assign a ticker symbol, define company characteristics and assign values for specific company data items.

### Assign a Company Ticker Symbol

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **Company**.  
The Company Definition dialog box displays. This is the primary dialog box used to define all of the details of your company.

2. Enter a unique ticker symbol in the **Tic/Cusip** field to identify the company.
3. Click the **Edit** button.  
Research Insight checks to see if this company already exists in the active Database Group. If the company does not exist, you will see a message:  
"No record with the key "ABC" was found in the database. Do you want to add it to the database?"
4. Click **OK** to add the company.

Now you are ready to define the characteristics of the company. Keep the Company Definition dialog box open and proceed to the following steps.

## Define Company Characteristics

The following company characteristics must be defined in the Company Definition dialog box to complete the process of adding a company to the database.

### Assign a GVKEY and CUSIP Number

When you add a company, Research Insight automatically assigns it a GVKEY (this is a five-digit number preceded by a U and used by Research Insight to identify your company). The GVKEY is not assigned until you click **Accept**, and it's not visible until you attempt to edit the company again. If you have access to Cusip Service Bureau information, you can also assign your company a Cusip number. Simply select Cusip from the **Company** drop-down list and enter the **Cusip Number**.

### Enter the Company Name

Enter the name of the company in the Name field.

### Select a Set of Related Companies

Use the Set drop-down list to select the SSet that you want to associate your company with. For example, if you want to access your company while working with the population of Canadian companies in the COMPUSTAT (North America) database, select **\$T Canadian**.

By default, Research Insight associates your company with the set of active companies in the Default Database (\$C for the population of active North America companies; \$G for the population of industrial active Global companies).

### Identify the Current Period

Use the Periodicity and Period fields together to select the current period for each reporting period used by Research Insight: annual, quarterly, monthly, weekly and daily.

The current period indicates the most recent data available for a reporting period. For example, if the latest annual reporting period for a company was December 2001, then select the Period of Y01 for the annual Periodicity. If the latest quarterly reporting period for a company with a fiscal year ending in December is the first quarter of 2002, in the Periodicity field, select "quarterly"; in the Period field, select "Q1Y02". To complete this step, select the current period for the monthly, weekly and daily periodicities.

**Note:** Each time you add a future data value for your company you need to reset the current period. For example, suppose you add a company in 2001 and select 2001 as the current period at that time. When you add a value for SALE (or any other item) in 2001, you need to reset the current period to 2001 in the Company Definition dialog box. You also have to select equivalent settings for the other periodicities. You do not need to do this when you add historical data.

### Indicate the Company's Fiscal Year

Use the arrow keys in the Fiscal Year field to select the month in which a company reports its annual financial statements.

### Select an Adjustment Factor

The Adjustment Factor field is used to adjust all user added items that require it. Generally, the adjustment factor should remain on the default setting of **1.000**.

### Add Business Segments, Geographic Segments or Issues

For a complete explanation of how to add segments to a company, refer to Chapter 5 - Editing Companies.

If you are working with the COMPUSTAT (Global) database, you need to make an additional selection within the Company Definition dialog box.

### Select the Native Currency

Use the currency field to select the native currency for your company. To access all of the available Global currencies, click **Look Up** and select **\$N GV Currency** from the Select Company Category list.

If you are adding a company that reports its financial statements in a currency not included in the Global database, you will first need to add the currency and three translation rates for one of the primary currencies. Refer to Chapter 8 - Adding and Editing Currencies.

### Add a Note to Your Company

You may find it useful to include a note about your company for future reference.

Begin from the Company Definition dialog box:

1. Click the **Note** button to display the Note dialog box.
2. Enter your note at the cursor.
3. Once you are finished, click **OK**.
4. Click **Accept** in the Item Definition dialog box to save your note.

To edit an existing note, access the Note dialog box and type over what you have previously written. Click **OK**. To save your changes, make sure that you select the **Accept** button in the Company Definition dialog box.

## Assigning Data Values to a Company

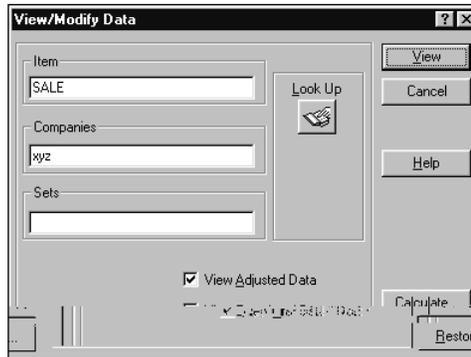
Once you have added a company, the next logical step is to add values for company data items such as Net Sales (SALE), Income Before Extraordinary Items (IB), Total Assets (AT), Primary SIC Code (SIC) and so on. Research Insight provides you with three ways of doing this: adding data manually, calculating data and importing data from an ASCII file.

The following section is based on an example of adding Net Sales and Total Assets to a user-added company with the ticker **XYZ**.

### Adding Data Manually

Continue from the active Company Definition dialog box:

1. Click the **View/Modify** button.  
The View/Modify Data dialog box displays.



2. Enter an item mnemonic in the **Item** field.
3. Enter a company ticker in the **Companies** field.
4. Click the **View** button.

The Company Data dialog box appears for the item. Notice that Research Insight shows no data available (@NA) for each available year. (The available years range from 1950 to 2049.)



## Deleting a Company

Once you decide that you have no further need for a company you have added, you can delete it along with all of its associated data values.

To delete a company:

1. Select **Company** from the **Databases** menu.
2. Enter the ticker for your company in the **Tic\Cusip** field.
3. Click the **Edit** button.
4. Click the **Delete** button.  
You are asked if you want to delete the company and all of its associated data.
5. Click **OK**.  
Research Insight deletes your company and the associated data values.

**Note:** Research Insight won't allow you to delete a company or any of its associated data values from the COMPUSTAT database. You cannot accidentally delete any data from the core database.

## Moving a Company to a Different Database

When you add a new company, Research Insight stores the item in a write-to database, rather than in the COMPUSTAT North America or Global core databases. There are two write-to databases associated with the core databases in Research Insight.

|                                  | <u>Write-to Database</u> |
|----------------------------------|--------------------------|
| <b>COMPUSTAT (North America)</b> | CS5USER                  |
| <b>COMPUSTAT (Global)</b>        | GV5USER                  |

The Database area at the bottom of the Company Definition dialog box indicates where the data item you created will be stored.

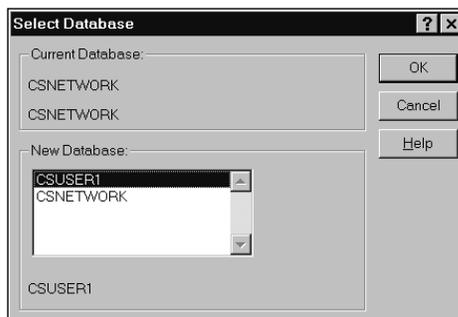


This section assumes you have previously created additional databases.

Begin from the Company Definition dialog box:

1. Enter a Ticker or cusip in the **Tic\Cusip** field.
2. Click **Edit**, then click **Move** to display the Select Database dialog box.

All of the available write-to databases are listed here.



3. Select the database that you want to move your company to.
4. Click **OK**.  
The new database is identified at the bottom of the Company Definition dialog box.
5. Click the **Accept** button instead of the **Close** button. By doing so, Research Insight accepts the database move for the company.