# Chap er 5 Charts

Charts not only make your information easier to read and understand, but they can also help you identify trends, make comparisons and clarify relationships that may not otherwise be apparent.

Standard & Poor's Research Insight provides you with an extensive collection of pre-defined charts to help you bring your financial analysis to life. This collection includes the most commonly used charts for both the COMPUSTAT (North America) and COMPUSTAT (Global) databases. We've made it easy for you to modify these charts by changing the chart style, colors and axis labels. You can also add titles, change fonts and customize the legend.

Research Insight also gives you the flexibility to create your own charts. With just a few clicks of the mouse, you can select the data you want to display and design a chart to your own unique specifications.

This chapter shows you how to

- use pre-defined charts
- modify pre-defined charts
- create your own charts

No e: The procedures in this chapter use the Money Management default style. To change your style to Money Management, select **Op ion** from the **Tool** menu, select the **S le** tab, select the **Mone Managemen** style and click **Se Ac i\_e S le**.

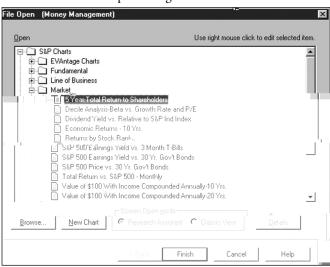
6

## U ing Pre-defined Char

Research Insight gives you the flexibility to evaluate your target companies using a variety of pre-defined charts. Here is how to run a 5 Year Total Return to Shareholders chart for Merck & Co.

Begin from the Research Insight desktop.

1. Click the (Open Char) button. You will see the File Open dialog box.

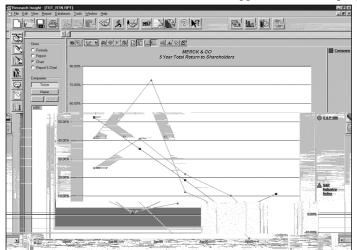


- 2. Open the Marke folder, and select 5 Year To al Re rn o Shareholder .
- 3. Click Fini h.

You will see the Run Assistant window.

Run Assistant	(Money Management)	×
Screen Set	Report Time Periods Screen - Classic View	
£.Qronanies mrk	_Junk_InJakialSet	C <u>h</u> ange Set
Economic Sect	ompanies	rnaround Fur.▲▶

4. Enter the ticker symbol mrk (Merck & Co.) in the Companie field and click OK.



A 5 Year Total Return to Shareholders chart appears for the company.

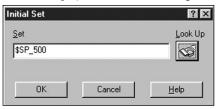
Hin : To view the underlying formulas for the corresponding report, select the Form la radio button in the Show area. To view the corresponding report for this chart, click the Repor radio button. You can also view the report and chart at the same time by clicking the Repor & Char radio button. To open another chart, click the (Open Char) icon on the desktop. To change your initial set or modify your base set and criteria, click the (R n) button.

71

### R nning a Pre-defined Char for M I iple Companie

Now let's say you want to look at a 5 Year Total Return to Shareholders chart on companies in the S&P 500 with the same SIC Code as Merck & Co. Follow the steps in the previous example, except in the Run Assistant window

- 1. Enter **mrk** in the **Companie** field.
- 2. Indighlighin Stamilar Companies list.
- 3. Click **Change Se** to display the Initial Set dialog box.



4. Enter **\$\$P\_500** in the **\$\$E** field and click **OK**.

Hin : If you don't know the name of a specific set, click the Look Up button, select a set, clickPa e, then click Clo e. The set name will be inserted in the Se field.

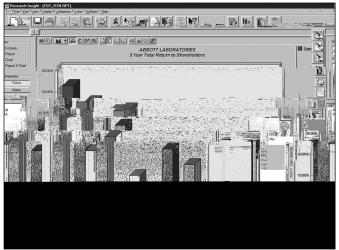
5. Click **OK** again. A 5 Year Total Return to Shareholders chart appears for the first company.

	Research Insight - [TOT_RTN.RPT]			- 6 ×
View	w <u>Report Databases Tools Window H</u> elp			@_x ⊡ Ele "Edit"
		£ 😒 🎟 🗋 😰 🤉 🕅 💽	LL 😰 🧟	
12	- 2d df. <u>Alv</u> E	the second second states and the second s		
	Show 20 10 12 1			100
		ABBOTT LABORATORIES	Company	C/Formula
13		5 Year Total Return to Shareholders		C Report
	60.00%			Chat Chat
				Heport & Unat
-				Companies
	50.00%			Ticker
				Companies Ticker Name
				RicyNest
	40.00%	A		ABT
				AGN AZA AHP
			S&P 500	AZA AHP BOL
	30.00%	$\sim$		EAST BMY
	30.00 %	La X XI		CHIR
			JNU KG	
-	ULY 20.00%			
1	I PFE			And in the local division of the local divis
	SGP SGP	$M^{-1}$		30
1	WPI - IN 110,00%2		> <u> </u>	
1				
				S&P: industry
	0.000			Index
	-10.00%			
		$\sim$		
	A1/97	Apr90 Apr99 Apr90	44(01	
Concession in which the	AP9/	Apresi Apresi Apresi		

located in the Companies area. Click the **Name** button to display the list of company name. To save the chart, select **Sa\_e A** from the **File** menu. En name in the **File Name** field and click **Sa\_e**. To print the chart, select **Prin** the **File** menu.

**Modif\_ing a Pre-defined Char** When a pre-defined chart is displayed on your screen, you can use the Chart toolbar at the top of the screen to modify how the chart is displayed. You can use the previous example for running a pre-defined chart on multiple companies.

- Click the Change Galler, T, pe) button from the Chart toolbar and select Col mn to display the chart in a column format.
- 2. Click the 🛱 (S i ch be een 3D and 2D Vie ) button to view the chart in 3D.
- 3. Click the 🛄 (Hori on al Grid) button to remove the grid. Your chart should now look like this:



# Crea ing Yor On Char

With Research Insight you can quickly create your own custom charts using the Chart Assistant. All you have to do is select the type of chart and the companies you want to appear in your chart, and Research Insight will retrieve and display the information you requested. The following example shows you how to create a bar chart comparing credit worthiness information for Ames Dept Stores, Target Corp., K Mart Corp. and Wal-Mart Stores.

Begin from the Research Insight desktop.

- 1. Click the (Char A i an ) button.
- 2. Click the **Bar** radio button in the Chart Style area.
- 3. Click the **M** I iple Companie radio button in the Companies per Chart area.
- 4. Click the  ${\bf C}$  rren  ${\bf Period}$  radio button in the Periods area, and click  ${\bf Ne}$  .

°Area ® Bar °High, Low, Close	12000.00		Cost of Goods Sold
- High, Low, Close,	8000.00	- I	SG8A
Volutine C Line	4000.00 2000.00 0.00		Net Incom
C Pie	DÉC	HWP IBM	(Loss)
Companies per Chart	Periods	r- Iime Reference	
C One Company	Current Period	C Annual C Mo	mthly O Daily
<ul> <li>Multiple Companies</li> </ul>	C Historical Analysis	C Quarterly C W	

- 5. Click the **Credi Wor hine** radio button from the Item Groups area.
- Hin : If the radio buttons you need are not displayed, click C omo eand select the items you need from the Item Group category. Click OK, and choose whether or not to save your changes.

⊂ Valuation	C Batios	New Item Look
C Grawth	C Fieldsf Call Lamings Es	
C Income · Ann	C U.S. Economic	Selected Items Interest Coverage
← Credit Worthiness	C Market & Returns	Debt Service Coverage EBITDA/Total Debt
C Company Specifics	<u>C</u> ustomize	
EBITDA/Total Diago EBITDA/Intere Op Margin Alt 0	st Ecwerage	add All>

- 6. Click the **Add All** button in the middle of the window to move all the Credit Worthiness items over to the Selected Items area, and click **Fini h**.
- 7. In the Run Assistant window, enter the companies' ticker symbols (ame , g , km, m )