The Chart Library

What is the Chart Library?

To enhance your financial analysis, Standard & Poor's Research Insight gives you an extensive collection of pre-defined company and industry performance 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.

We've made it easy for you to customize each of the insightful charts included in our software to suit your individual needs. You can change a chart's style, colors and axis labels. You can add titles, change fonts and customize the legend. You can even change a two-dimensional chart to a dynamic three-dimensional chart. **And, just like the Report Library, all the Research Insight charts are available in Excel!**

The Chart Library provides both an example and an explanation of each of the pre-defined charts available in Research Insight using the COMPUSTAT® (North America) database. The Chart Library features:

- 40 pre-defined charts
- Charts for commonly-used presentations
- Analytical charts such as fundamental, market and pricing
- Segment charts that allow you to compare companies among industries
- Easy modification to meet your specific needs

Selecting a Chart Which Meets Your Needs

Research Insight contains an extensive collection of pre-defined charts to help you enhance your financial analysis. All of the charts contained in the software are categorized according to the type of data they display. Each of these categories is explained below.

Fundamental Charts

Chart Name	Chart File Name
Capital Structure - Quarterly	CAPITAL
Compound Growth - Sales - 5 Year	CSALE5
Gross Profit Margin vs. Sales	CGPM
Receivables Turnover vs. Sales	CRTO
Sales vs. Income Before Extra Items	CSALENI

Line of Business Charts

Chart Name	Chart File Name
Line of Business - Operating Profit	SEG_OPER
Line of Business - Sales	SEG_SALE

Market Charts

Chart Name	Chart File Name
5 Year Total Return to Shareholders	TOT_RTN
Decile Analysis - Beta vs. Growth Rate and P/E	GROW_PE
Dividend Yield vs. Relative to S&P Index	DIVYIELD
Economic Returns - 10 Years	ECONRTN
Returns by Stock Rank	RTN_RANK
S&P 500 Earnings Yield vs. 3 Month T-Bills	SP_TBILL
S&P 500 Earnings Yield vs. 30 Year Government Bonds	SP_BOND
S&P 500 Price vs. 30 Year Government Bonds	SP_PRC
Total Return vs. S&P 500 - Monthly	TOT_RTNM
Value of $100 With Income Compounded Annually - 10 Years	VALUE10Y
Value of $100 With Income Compounded Annually - 20 Years	VALUE20Y

Peer Charts

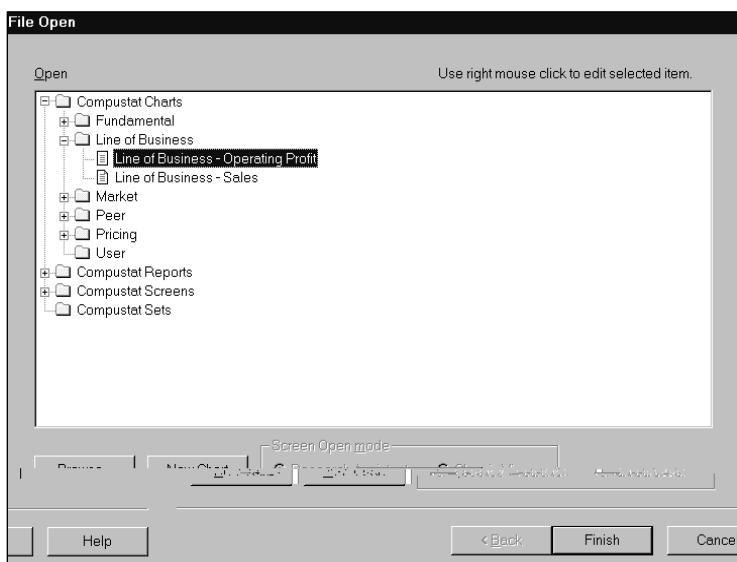| Chart Name	Chart File Name
Debt to Equity vs. Peer Companies (Quartiled)	DEBTEQ
Earnings Before Depreciation vs. Peer Set	EBITDA
Net Profit Margin vs. Peer Companies (Quartiled)	NPM
Return on Assets vs. Peer Set	ROAQ
Return on Average Equity vs. Peer Companies (Quartiled)	ROAE
Return on Equity vs. Peer Set	ROEQ

Pricing Charts

Chart Name	Chart File Name
Comparative Price/Earnings Ratio	PEM_PEER
Earnings & Price Momentum	MOMENTUM
Price and EPS	PRCEPS
Price Return vs. S&P 500 - Daily	PRC_RETD
Price Return vs. S&P 500 - Monthly	PRC_RETM
Price Value Base - Annual	VALUEBSE
Price Value Base - Daily	VALUEDAY
Price/Book Ratio vs. Relative to S&P Industry Index	PRC_BOOK
Price/Earnings Monthly vs. Relative to S&P Industry Index	PE_INDEX
Price/Earnings Ratio vs. 30 Year Government Bonds	PE_BONDS
Price/Sales Ratio vs. Industry Sector	PRC_SALE
Price-Close Daily vs. 14 Day Relative Strength Index	PRC_RSI
Price-Close Monthly - 10 Years	PRICE
Price-Close Monthly vs. Relative to S&P Industry Index	PRC_REL
Price-Close vs. Earnings Per Share and Dividends Per Share	EPS_DVPS
Price-High/Low/Close - Volume	HILOWCL

Running A Chart

In this section, we will show you how easy it is to run any of the Research Insight pre-defined charts. In this example we will run a chart that displays the operating profit for each business segment of Proctor & Gamble Company.
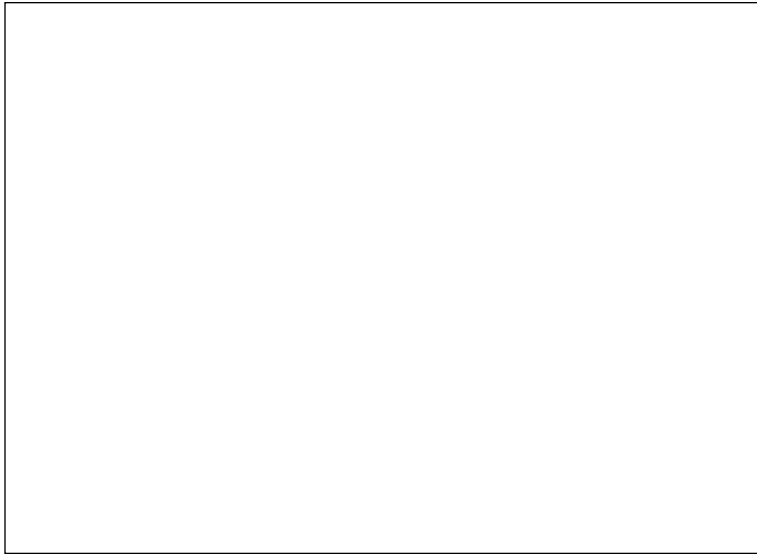
Begin from the Research Insight Desktop:

1. Click the **(Open Chart)** button.
    You will see the File Open dialog box and a list of the charts in the COMPUSTAT Charts folder.

2. Open the **Line of Business** folder, select **Line of Business - Operating Profit**, and click **Finish**.

You'll see the Run Assistant Window.

3. Enter the ticker symbol for Proctor & Gamble Co. (pg) in the **Companies** field and click **OK**. Research Insight will display the operating profit for each line of business for Proctor and Gamble Co.
4. If you want to add, delete or change companies from your initial set, or modify your criteria, click the 🏃**(Run)** button to re-open the Run Assistant window.

Hint: If you are not sure of a ticker symbol, click the 📇**(Look Up)** button to search the list of companies in the COMPUSTAT database. When running a chart for multiple companies, you will need to separate the tickers with commas. If you are running a chart for a set of companies, make sure to include a **"$"** before the set name. For more information on running charts with sets, refer to the *Research Insight Getting Started* manual or online help.
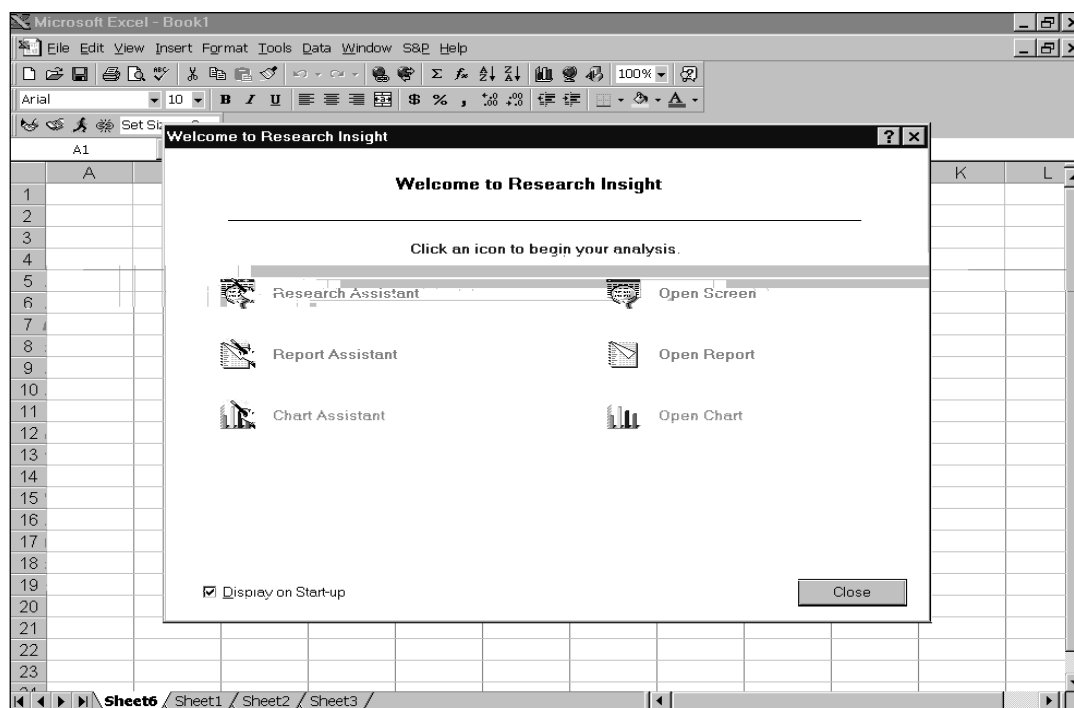
Opening a Research Insight Chart Using Excel

In Research Insight you have the ability to run *all* reports and charts as Excel spreadsheets. Excel requests data from the Research Insight database using a communication link known as Active-X Technology. Whether you're using Research Insight or Excel, the same information is available for your financial analysis without having to convert or import files. The example in this section was done using Microsoft Excel 8.0.
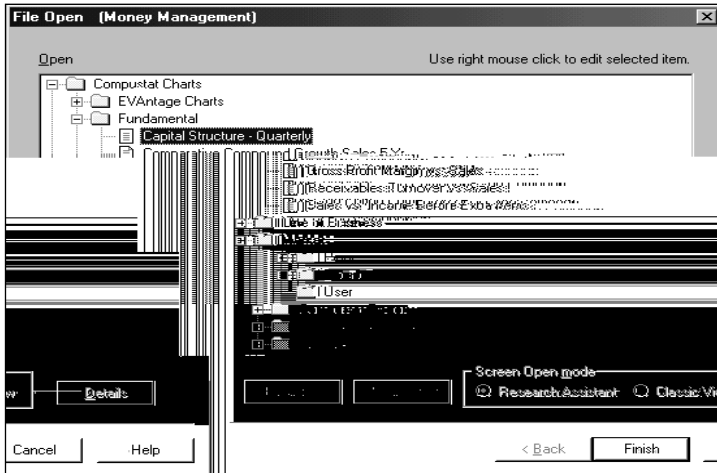
In this example, we'll show you how to open a chart that displays the quarterly capital structure for Chase Manhattan Corporation.
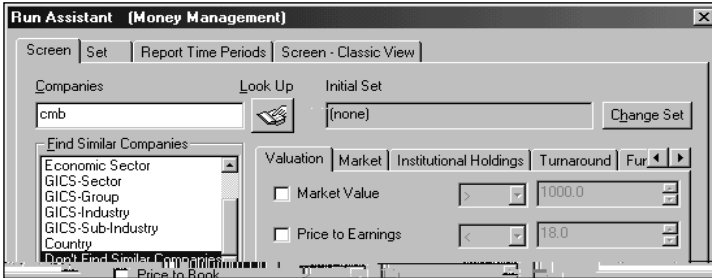
Begin with Excel open:
1.   From the **S&P** menu, select **Welcome to Research Insight.**
       You will see the Welcome to Research Insight window appear on top of Excel.

2.   Select **Open Chart**.
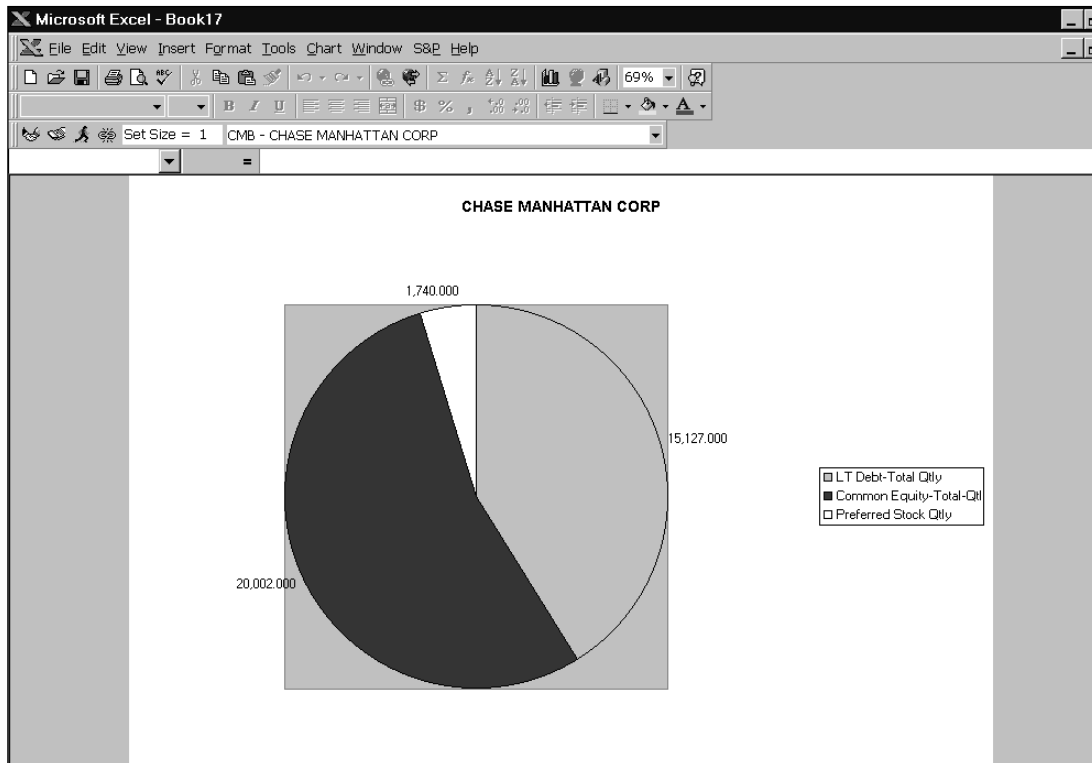   You will see the File Open window

3.   From the **Fundamental** folder, select **Capital Structure - Quarterly** and click **Finish**.

4.   Enter the ticker symbol for Chase Manhattan Corporation (**cmb**) in the **Companies** field.

Hint: If you are not sure of a ticker symbol, click the 🖑 **(Look Up)** button to search the companies in the North America database.

5.   Click **OK**.
      You will see a Capital Structure - Quarterly Chart for Chase Manhattan Corporation in Excel

Hint: To view the chart for other companies, click the ⚡**(Run)** button to open the Run Assistant window where you can add, change, or delete companies from your initial set or modify the criteria used to create the spreadsheet.