Bloomberg Orientation

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AGENDA

- Introduction
- Login
- Unique keyboard navigation
- Looking up News
- Looking up Equities
- Equity Screening
- Looking up Industry-wide information
- Looking up Bonds, ETFs
- Looking up Macroeconomic data
- Looking up currencies
- Where do I get help?

INTRODUCTION TO BLOOMBERG

What is Bloomberg?

- Financial, news and economic database
- Real time information:- 15 min delay for academic subscribers.
- Scope: Global coverage

Bloomberg l.p.

Bloomberg L.P. is a financial data analytics and media company present in over 194 countries that provides financial software tools, data services and news through the Bloomberg Professional Service to financial and business companies.

Keyboard Navigation

Yellow =For different asset classes

 (eg equity, fixed income, commodity, etc)

Blue: Panel to toggle between windows.

Green=Action

Red=log on/off

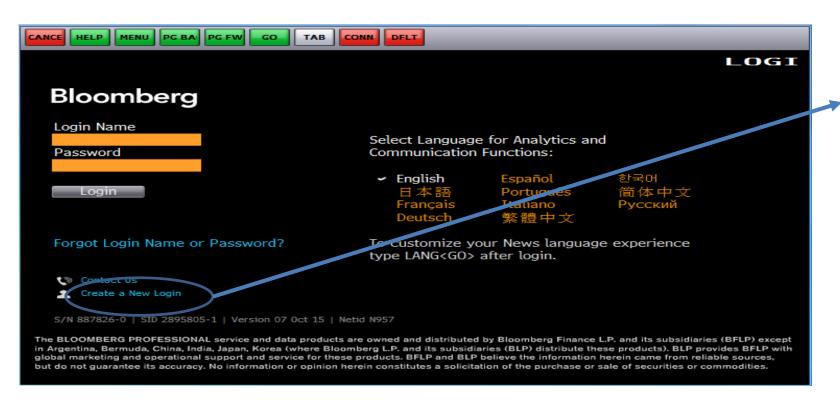|		
Esc CANCEL	END MENU	SEARCH
Enter GO	HELP	F8 EQUITY

Bloomberg

Login

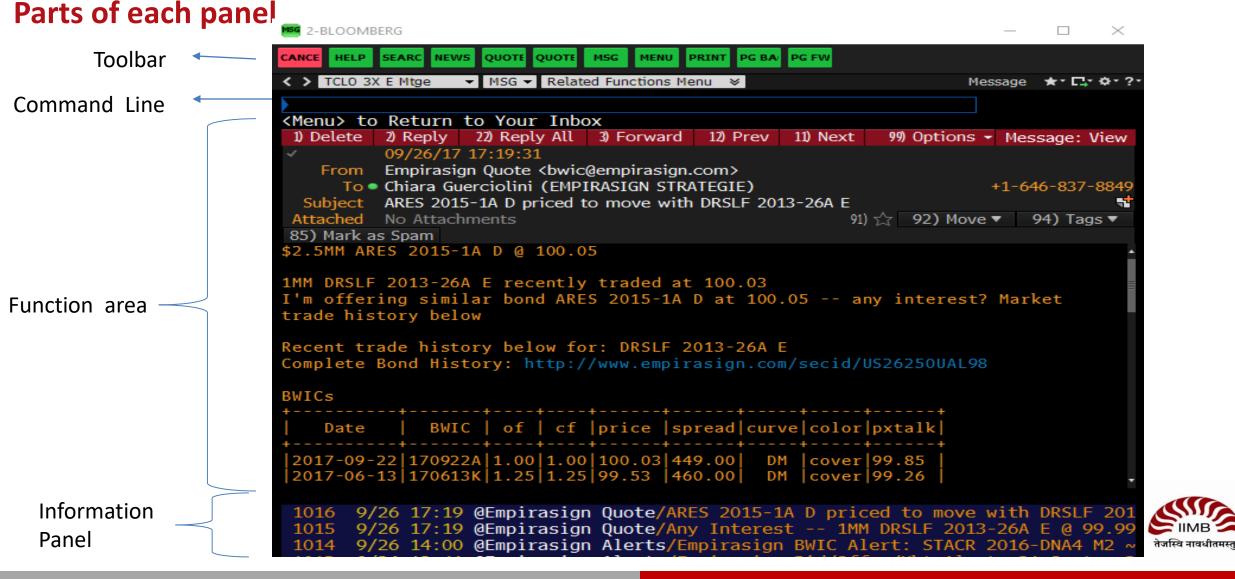- Click on the Bloomberg icon on the desktop

- Use the unique login ID and password for each terminal.

Click on Create a New Login and follow the instructions. Don't forget to take your mobile phones as the Verification code is sent to your phone or mail.

When you first log in to Bloomberg, up to four Bloomberg Panels appear. The panels are independent workspaces that enable you to multi-task within the Bloomberg system. Parts of each panel

Toolbar

Command Line

Function area

Information Panel

How to use the command line?

- It is a command and menu-based system (command line is not a search box.)

- How to use the database?
  - Start from an asset class and then go forward from there

- Type the company name and wait for the drop down
- Choose what is relevant and required from the drop down.

Functions and Securities

RUNNING FUNCTIONS

- Functions are unique Bloomberg applications that provide analysis and information on securities, sectors, regions and more.

- Two types
  - Non-security: Non-security functions provide information or analysis on an entire market sector and do not require a loaded security. WEI <GO>
  - Security: Security-specific functions analyze a loaded security.
  - TTMT IN <EQUITY> GP <GO>.

WORKING WITH SECURITIES

- Securities are financial instruments— like stocks and bonds— that you can analyze with Bloomberg functions.

Comprehensive Help (HL)

- HL allows you to search by keyword across all categories of information, including functions, securities, companies and people. HL groups results by category and relevance.

- TATA MOTORS EARNINGS Press the <SEARCH> key on the keyboard.

- HL appears with a categorized list of matches. » Select the appropriate match from the featured search results section of the screen

1: LOOKING UP NEWS

An Overview

NEWS

- NEWS ON TATA MOTORS ACQUISITIONS IN ECONOMIC TIMES

TOPIC

Source

- **NI : Filter the required topic from various available topics**

- NH: Most upto-date news from particular sources.

- AID: automated insights on demand: This gives snapshot about the loaded security from the entire Bloomberg database.

2: LOOKING UP EQUITIES

An Overview

Looking up equities

- If you know the ticker for Tata Motors (e.g. TTMT)
- Type "TTMT" and then press F8 key to get EQUITY.

Security Finder: SECF <GO>

- Allows you to filter and search for all securities available on Bloomberg.
- Need to type in the orange box to search
- Sort the column by clicking on the header.
- Once a security is loaded, you can then run single-security functions like DES and RV.

TTMT IN Equity Menu screen

1) Company Overview >
2) DES   Security Description
3) CF   Company Filings
4) CN   Company News

5) Company Analysis >
6) FA   Financial Analysis
7) OWN   Ownership Summary
8) CRPR Credit Rating Profile

9) Research & Estimates >
10) EE   Earnings & Estimates
11) BRC   Research
12) BIP   BI Primary Industry
13) GNR   Legal, Regulation & Govt Anal...

14) Comparative Analytics >
15) RV   Relative Valuation
16) EQRV Equity Relative Valuation

17) Charting & Reporting >
18) GP   Line Chart
19) GF   Graph Fundamentals

20) Security Surveillance >
21) EVT   Company Events
22) BQ   Bloomberg Quote

23) Trade Analytics >
24) IOIA IOI & Advert Overview
25) MDM Market Depth Monitor
26) VWAP Price and Volume Dashboard
27) RANK Broker Rankings
28) TP   Trading Performance

29) Derivatives >
30) OMON Option Monitor

Accessing Menus There are three ways to access menus (Menu Button, Menu Key and Yellow Key).

Example: To browse the Equities menu, press <EQUITY> <GO>.

Example: To access the menu of functions that can be used to analyze TTMT US, enter TTMT IN <EQUITY> <GO>.

Equity overview: DES <GO>

DES provides consolidated financial information about a specific corporate or government security, including issuance and redemption, identification numbers and ratings.

Use DES to review, in one place, all the descriptive information you need to evaluate, buy, sell and trade a bond. To simplify analysis, all the tools in DES remain the same regardless of the type of bond.

Financial analysis: FA <GO>

Use FA (Financial Analysis) to display financial history for a specific company or equity index, identify trends and to gain data transparency so you can analyze the value of a potential investment, partnership or acquisition target

Price graph (chart): GP <GO>

- Graph and tables including open, high, low, closing price, and volume
- We can compare graphs of two companies and indices also.

Historical price table: HP <GO>

HP is one of three historical price tables that allow you to display a security's price, yield, and/or volume plus the close, open, high, and low prices. You can also select the time period range and period frequency.

Analyst recommendations

Analyst recommendations: ANR<GO>

- ANR provide transparency into analyst recommendations for a selected equity, so you can determine the latest analyst sentiment, as well as monitor changes in opinion and analyze the quality of analyst predictions.
- analyst recommendations, price targets, price target time periods, and total return rankings, as well as consensus rating for the equity. The consensus rating is based on broker recommendations compiled by researchers around the world.
- The screen is divided into 4 areas
  – Control Area
  – Consensus Rating
  – Recommendation Charts
  – Recommendations Table

Broker/analyst reports: BRC<GO>

- RES/BRC is your gateway to research from over 1,500 providers, including brokers, independent providers, market research firms, industry associations, and other premium content.
- The Research Portal screen is divided into a control area and a research grid.

EQRV: Relative valuation

- Use RV (Relative Value) to perform a customized peer group analysis using a proprietary industry classification system that places companies in multiple industries by revenue.

- Relative value analysis can be applied to companies (stocks), mutual funds or municipal bond issuers.

SPLC

- Supply chain conditions provide crucial insights into a company's future; offers a unique look at supply chain fundamentals–mapping business relationships across suppliers, customers and competitors for more than 35,000 companies globally.

3: EQUITY SCREENING

An Overview

Equity screening: EQS <GO>

- Add screening criteria (e.g. exchanges)
- Criteria may include universe categories, such as countries, exchanges, indices, security types, security attributes, security lists, as well as data categories, such as fundamentals, estimates, financial and price ratios, and technical fields.
- Use "Fields" button to search for screening criteria
- Click on "Results" button
- Results list
- Analyse

4: LOOKING UP INDUSTRY-WISE INFORMATION

An Overview

FIND INDUSTRY INFORMATION: BI<GO>

- Go to Bloomberg Intelligence • Enter BI<GO> • Select industry and drill down to dashboard
- More than 100 analysts highlight themes, performance drivers and metrics for each industry, giving you insight and perspective for your investment decisions.

5: LOOKING UP BONDS

An Overview

Bonds screening: SRCH <GO>

- Go to "Example Searches" tab for pre-made screens
- Load Search to view results

Bonds can be screened based on various criteria such as amount outstanding, maturity date, issue date, rating etc.

YAS

- Price a fixed-income security using spreads to a benchmark issue/benchmark curve,
- calculate risk/hedge ratios/cost of carry, display market data, pricing information, interpolated spreads to benchmark curves,
- descriptive/ fundamental/rating data and relative value analysis.

COMB

- COMB allows you to compare the relative value of a customizable list of corporate bonds or syndicated loans.

- You can use filters to find bonds/loans that share similar characteristics or import a list of bonds/loans that you have previously created and saved

Term structure, Yield curve

- Eg: RILIN <CORP>
- GC gives the yield curve.
- IYC<GO> International Yield Curves, graphs the term structure of interest rates around the world. Compare government yield curves and see where you can achieve the highest yield.

5: LOOKING UP MACROECONOMIC DATA

An Overview

Inflation Index in India, IIP, GDP

- **ECO <GO>** Use ECO (Economic Release Calendars) to display, customize and manage multiple economic calendars. Economic calendars can be managed by region, country and event type, and can display current, historical and upcoming economic event details.
  - Click on **Change Date** (Data back to 1996)
- **ESNP <GO>** Use to display the economic statistics of a specific country.
  - Choose country (example: United States)
  - Choose **Unemployment Rate**
- **ECST <GO>** Use to display current and historical economic statistics
  - Choose country (example: United States)
  - Then choose **CPI**
- **IMF <GO>** Up to 50 Years of monthly financial and economic data on over 200 countries

CURRENCIES

Currencies

- FXIP <GO>: Forex information portal

- Eg: USDINR Curncy gives the MENU

- GP<GO> shows how the rupee has been doing against USD

- FXFC<GO> Forex forecasts.

CREATING PORTFOLIOS

Creating portfolios

PRTU<GO>

- Create -> Give it a name

- You can change the date and see how it performs.

- Analyze the basket of securities, YTD, Characteristics such as P/E, P/B, D/E and dividends.

- You can also see how it performs when compared to a benchmark index.

- Generate a report-> chart or pdf

- Efficient frontier is not directly seen here, however we can get the statistical summary such as Beta, Risk, Sharpe ration, Jensen measure, Treynor measure etc.

OTHER COMMANDS

OTHER USEFUL COMMANDS

- Commodity Price Forecast: CPFC <GO>

- Economic Forecast: ECFC <GO>

- Other commands to note • Bloomberg Resource Centre Cheatsheets with commonly used commands: BPS <GO>

- Other commands to note • Cheatsheets in PDF format, can be downloaded

- Other commands to note • To register for Bloomberg seminars, use BU <GO> for Bloomberg University

- Other commands to note • Bloomberg Market Concepts BMC <GO> • 8-hour course with 4 modules

- **NLRT** Set up Bloomberg Message (MSG) news alerts

Thank you