

BLOOMBERG

May 17, 2019

BLOOMBERG BASICS

The Bloomberg terminals contain access to financial news and market data and analysis of equities, bonds, commodities, etc. The data we receive through the U of C's Bloomberg academic license has a 20 minute delay.

Log In

Use mouse to click on "<Enter> or <GO> to begin" in blue type
Input login and password in amber boxes

Keyboard and Screen

Yellow keys – Market sectors: Equities, commodities, currencies, bonds – government, corporate, municipal

Green keys – Action keys: Go, Menu, Back, Help

Amber coloured boxes – fields that can be edited

Data Search

Begin typing at blue cursor; Bloomberg is intuitive and will display what it thinks you are looking for

Use mouse to click on desired option

Standard security lookup is: ticker symbol <space> country code – yellow equities button – Bloomberg mnemonic (optional) - <GO>

Ex: ECA CN <EQUITY> <GO> - this brings up the call-up or menu screen for the equity

Amber colored fields can be changed, ex: date range

If a screen has a notation such as Page 1/10, ex.: Security Description, use the PgDn key to view subsequent pages

<HELP> – press help key once for information about your topic and <HELP>< HELP> to send an email to a Bloomberg customer service rep (24 hour turnaround)

Green <MENU> key – brings cursor to top left

- Goes back to main menu

Blue <PANEL>key - moves to other screen

Save and Print

Red Edit tab – Copy data to clipboard – Open Excel – Control 'V' to paste

BLOOMBERG

May 17, 2019

Formatting Problems

Note that downloading financial data to Excel carries formatting that will allow the data to be updated if the file is reopened on a Bloomberg terminal. However that means that the data will not display properly if the Excel file is opened on any other computer. To eliminate the formatting: once you have downloaded the data into an Excel file, copy the whole spreadsheet, open a new sheet and use "Paste Options" to **paste as "Values"**.

Red Actions tab – choose export to pdf, print, etc.

If graph is displayed and there is no Edit or Actions tab, right-click on graph - copy/export options - copy data to clipboard -, open Excel from start menu - paste data

If the screen does not have an Edit tab, Actions tab, or graph, use cursor to click and drag across page - control C (copy) - open Excel or Word- control V (paste). Each page will have to be copied separately.

If results are poorly formatted, click on: Data –text to columns – next – next – next ~ at top of page
Click top left cell in Excel – double click on horizontal line between column A & B to fix display
To delete pipes, click "Find & select" binocular icon on top toolbar - replace | with <space>

Email

Actions – Export – Image – Right click - Save in Documents or Downloads folder or on usb key – Open email and send image as attachment

Training

BMC – Bloomberg Market Concepts (video tutorials)

BLOOMBERG

May 17, 2019

EQUITIES**Common Equity Mnemonics**

Mnemonics are codes that act as shortcuts to save on computer keystrokes

CU	Call up menu
DES	Description (company overview)
GP	Graph price and number of shares traded (date range can be changed) - Actions – Table - to display tabular data used to produce graph
HP	Historical price; table format
ANR	Analyst recommendations
BRC	Analyst reports
COMP	Comparative returns – default compares security to the index and to the sub-index - Amber fields can be updated to compare return percentage to other equities, commodities, etc. -Can also go to templates: XLTP - Historical studies for multiple securities (see BLOOMBERG TEMPLATES, page 6)
RV	Relative value – to compare a security to a peer group -Region, ex: limit to country of domicile <GO> -To delete companies from results list, click settings - “edit comparables”, uncheck and SAVE -Custom tab to add data fields to results, ex: ESG disclosure score (environmental factors)
FA	Financial analysis – I/S, B/S, ratios, etc. -Amber boxes – select periods, periodicity, currency -Grey boxes – select I/S, B/S, etc. -Actions – field – input search term such as: research and development -Or add field to custom template
EQS	Equity screen -Amber fields can be edited; can screen by sector (industry), geography, exchange, etc. -Update -Add criteria -Input term in amber box, ex: p/e ratio, total cash >, <, =, etc. -Input another term: Options – arithmetic - *.8 (80%), +2 (if value must be greater than 2) -Results -Fields - Add columns: enter keyword and select -Delete columns: right click -Sort results: click on column heading to sort by results in that field -Actions – edit display – selection – update
XLTP	Templates (see BLOOMBERG TEMPLATES, page 6)

BLOOMBERG

May 17, 2019

Other Mnemonics

PRTU	To set up a portfolio -Portfolios set up on terminal will be listed -Click on “create new” -Name portfolio -Amber fields may be edited -Enter security into the amber security field in the format RY<space>CN -Enter number of shares into Position field -Enter price paid into Cost Price field -Once set up, input HFA (historical fund analysis) to compare the portfolio to the index, exchange, etc.
BMC	Bloomberg Market Concepts – video tutorials – macroeconomic overview of world markets
BU	Bloomberg University – upcoming live training, etc.
BI	Bloomberg Intelligence – Industry information: energy, includes oil rigs by geography
BMAP	Maps such as refineries, shipping vessels, etc.
VOLT	Home page for electricity
CN	Company news
MA	Mergers & acquisitions
DVD	Dividend summary
HDS	Equity holders by size
PPC	Peer comparative tool
RVRD	Compare debt peers
ECST	World economic statistics
BNEF	Bloomberg new energy finance (industry intelligence service)

Financial Mnemonics

BETA	Beta calculations
HRA	Regression analysis
RSKC	Company risk
ERN	Earnings summary
EE	Earnings estimates
EEO	Earnings estimates consensus overview
EEB	Earnings estimates consensus detail
CRP	Country risk premium
EQRP	Equity risk premium
HEDG	Equity hedge screen
TRA	Total return analysis (with or without dividends reinvested)

BLOOMBERG

May 17, 2019

BLOOMBERG ADVANCED**EXCEL PLUG IN****Historical comparison of companies**

Open Excel using start menu once Bloomberg is open

Click Bloomberg tab on top toolbar

- Use **Formula Builder** as previous tool has been retired

Import data - Real time historical - Historical end of day

Input securities and double click to add to "selected securities" column*

Next

Input data fields by typing in and choosing desired term, ex: last price, day to day total return, etc.

Click "Add" after each data field is entered

Next

Input periodicity and date range, ex: fiscal, annual, quarterly

Input currency, display information, etc.

Finish

* Can import list of securities from Excel; format must be TICKER<space>COUNTRY<space><EQUITY>, ex:

ECA CN EQUITY

If importing, sheet 1 should have securities list

Open sheet 2 and click on Bloomberg tab

Import data – real time historical – historical end of day -

Select securities – from spreadsheet

Click icon

Open sheet 1 – box with icon should be displayed

Click first company from column A– click shift button – click last company from column A

Click icon

Import

Next

Input data fields by typing in and choosing desired term, ex: last price, day to day total return, etc.

Click "Add" after each data field is entered

Next

Input periodicity and date range, ex: fiscal, annual, quarterly

Input currency, display information, etc.

Finish

BLOOMBERG

May 17, 2019

BLOOMBERG TEMPLATES

Bloomberg has over 400 templates
Only one template can be open at a time

Company compare – total return**XLTP XSTD**

You can also access this the following way:

XLTP

View Template List

Click top of list to sort alphabetically

Scroll down to “Historical studies for multiple securities”

Open

Import/edit securities

User defined

Enter ticker <space> country code (ex: CN), click yellow equity button, click add

GO

Settings

Total return (other options include historical volatility, statistics such as beta and more)

Next

Select display items, ex: last price, dividends, price appreciation, total return, etc.

Currency, ex. CAD

Select third default: “rolling returns over”

Next

Period, ex: Daily, weekly, etc.

Sort, ex: reverse chronological - Finish