Capital IQ
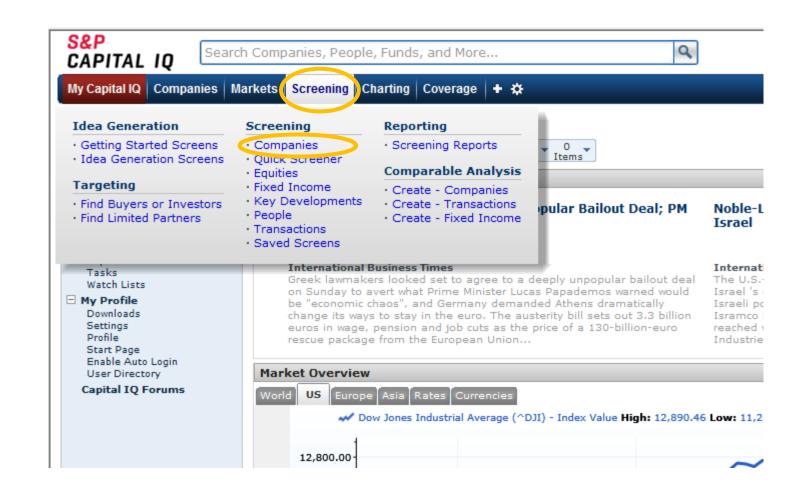## Companies with Operations in Foreign Countries

Business Library

Haskayne School of Business

June 2018

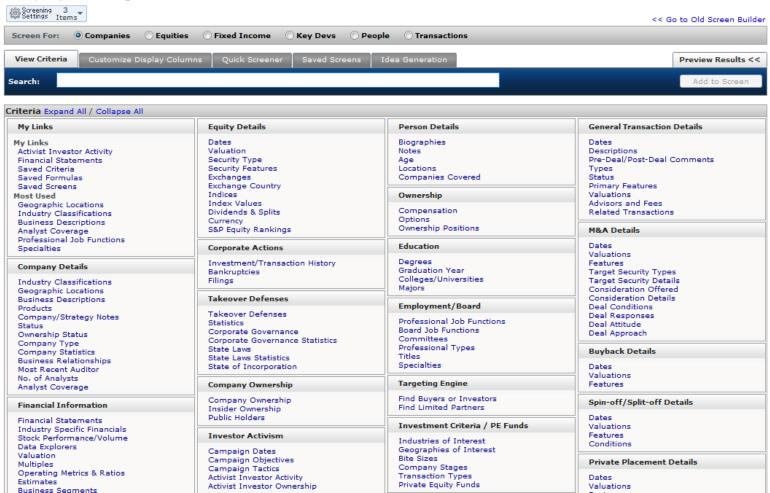## There are 2 methods to identify companies with operations in foreign countries.

1. Screen with assets from geographic segments
2. Screen for countries or regions mentioned in the company description

Use Capital IQ's screening function to identify countries or regions where companies have operations.

There are numerous criteria that may be applied to screen or filter companies. Apply as many criteria as required to identify the companies that meet specifications.
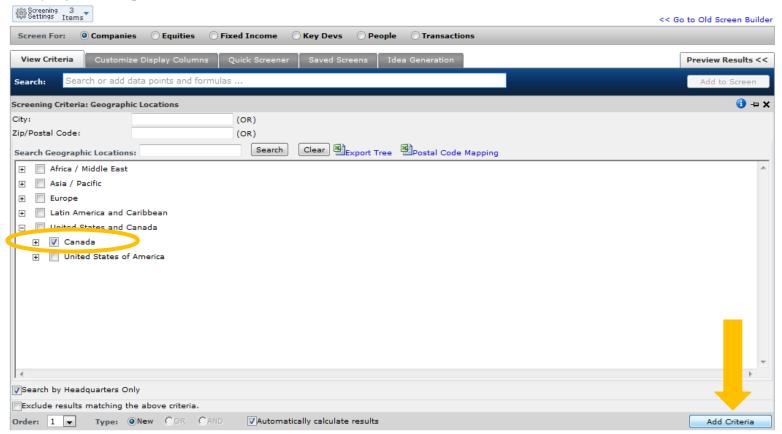
As an example we will identify oil and gas exploration companies based in Canada with operations in Brazil, Colombia, Argentina or Venezuela.

Select geography for the primary (home) companies, i.e. in this example, Canadian companies.

Expand geographic regions to select the correct "country of domicile", then click on "Add Criteria"

Next, select the industry sector by clicking on "Industry Classifications".

Expand industry sectors to select the relevant industry, the click on "Add Criteria"

You may also search for the appropriate industry sector using keywords.

You may limit the search to publicly traded companies.

Click on "Company Type" to display a drop down list of company types. Select "Public Company" and add it to the Selected items area. Click on "Add Criteria".

The results of the screening process are displayed and updated as each new criterion is added. The list of companies on the right side of the screen is also updated.

Which method do you want to apply?

- At this point in the screening process you may choose to identify companies who report assets from different countries or regions.

OR

- Identify companies that have mentioned country or region names in the business description.

Option 1

Assets from geographic segments

To identify which companies have operations in the countries you are interested in (Brazil, Colombia, Venezuela and Argentina) click on "Geographic Segments".

Transaction Descriptions
Geographies of Interest
Biographies
Equity Dates
Operating Metrics & Ratios

Company Details

Industry Classifications
Geographic Locations
Business Descriptions
Products
Company/Strategy Notes
Status
Ownership Status
Company Type
Company Statistics
Business Relationships
Most Recent Auditor
No. of Analysts
Analyst Coverage

Financial Information

Financial Statements
Industry Specific Financials
Stock Performance/Volume
Data Explorers
Valuation
Multiples
Operating Metrics & Ratios
Estimates
Business Segments
Geographic Segments
Intra-Company Ranking
Inter-Company Ranking

Formula Builder

Create Custom Formula
Saved Formulas
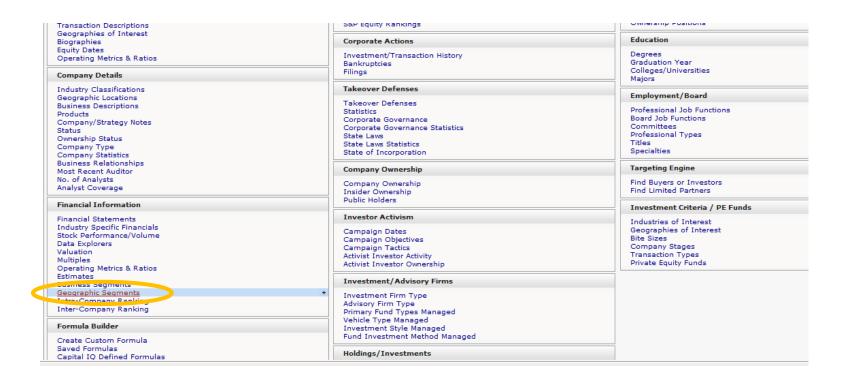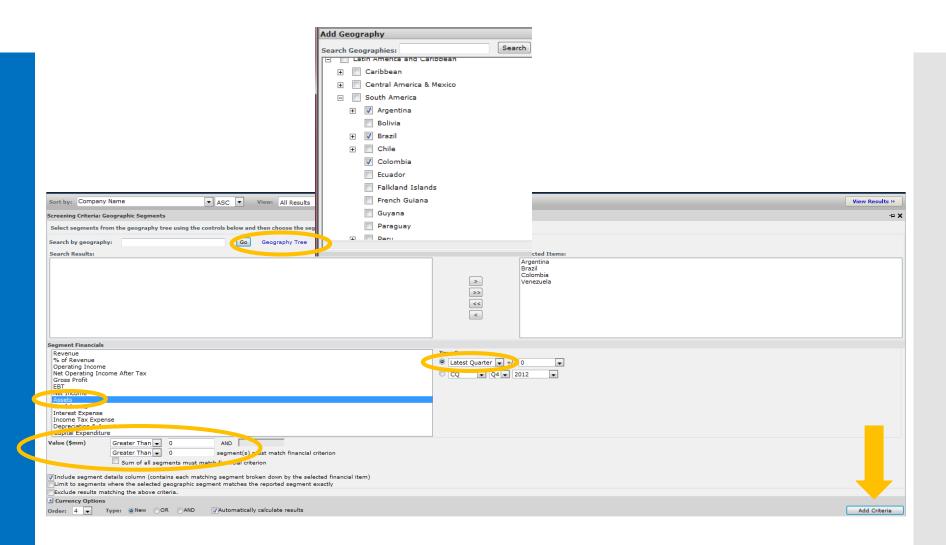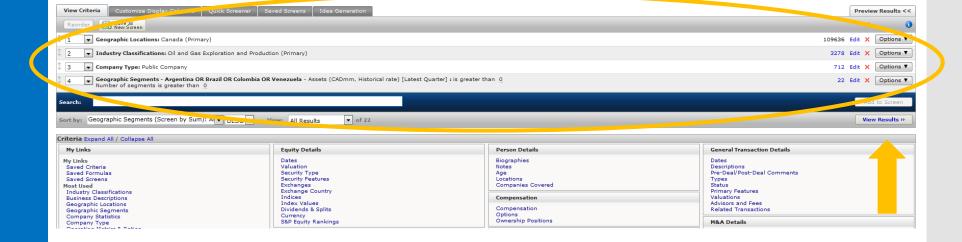Capital IQ Defined Formulas

S&P Equity Rankings

Corporate Actions

Investment/Transaction History
Bankruptcies
Filings

Takeover Defenses

Takeover Defenses
Statistics
Corporate Governance
Corporate Governance Statistics
State Laws
State Laws Statistics
State of Incorporation

Company Ownership

Company Ownership
Insider Ownership
Public Holders

Investor Activism

Campaign Dates
Campaign Objectives
Campaign Tactics
Activist Investor Activity
Activist Investor Ownership

Investment/Advisory Firms

Investment Firm Type
Advisory Firm Type
Primary Fund Types Managed
Vehicle Type Managed
Investment Style Managed
Fund Investment Method Managed

Holdings/Investments

Ownership Positions

Education

Degrees
Graduation Year
Colleges/Universities
Majors

Employment/Board

Professional Job Functions
Board Job Functions
Committees
Professional Types
Titles
Specialties

Targeting Engine

Find Buyers or Investors
Find Limited Partners

Investment Criteria / PE Funds

Industries of Interest
Geographies of Interest
Bite Sizes
Company Stages
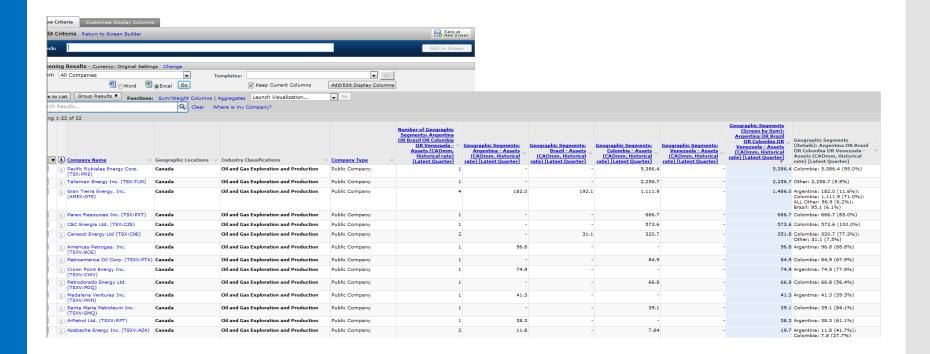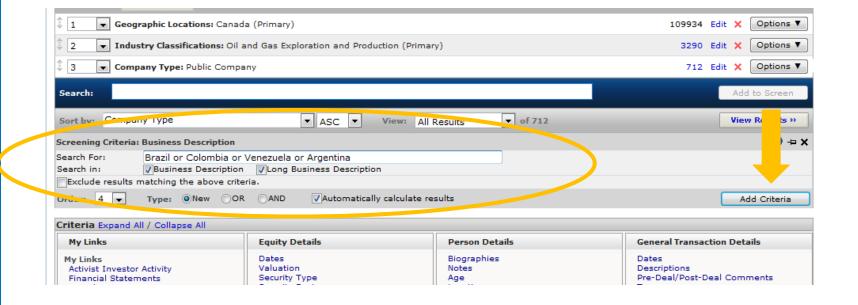Transaction Types
Private Equity Funds

Use the "Geography Tree" to select the countries you are interested in. Select "Assets" from the "Segment Financials" menu. Enter "Greater than 0" in both "Value" boxed. Select "Latest Quarter" as the time frame. Click "Add Criteria".

Results of the screen are displayed. 22 companies have been identified as Canadian public companies in the oil and gas exploration industry with business segments in Brazil, Venezuela, Argentina or Colombia. Click on "View Results".

Results are displayed with default data columns – these columns are related to geographic segment information.

Option 2

Company Descriptions

To identify which companies have operations in the countries you are interested in (Brazil, Columbia, Venezuela and Argentina) click on "Business Descriptions".
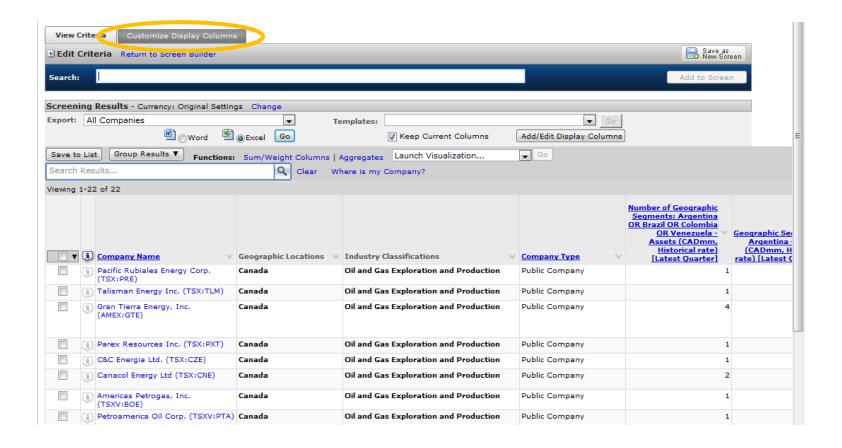
Select both Business Description and Long Business Description and enter the words you woul dlike to find in the description. Use "or" between words to indicated that any of these words are acceptable. Click on "Add Criteria".

Results of the screen are displayed. 36 companies have been identified as Canadian public companies in the oil and gas exploration industry whose business descriptions mention Brazil, Venezuela, Argentina or Colombia. Click on "View Results".
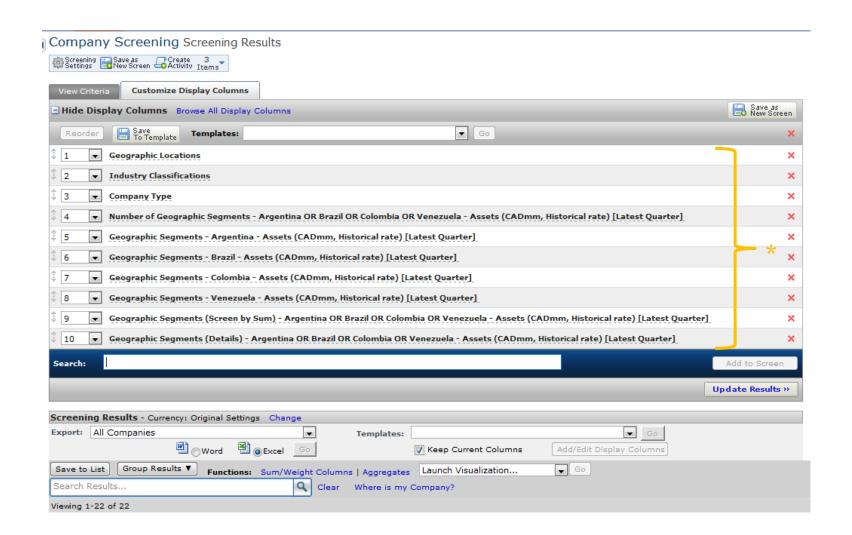
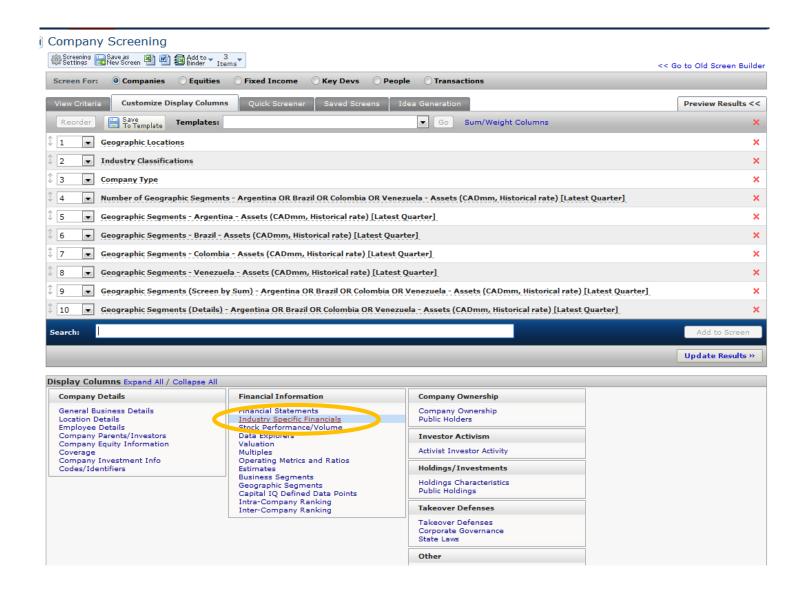Customize the data displayed by clicking on "Customize Display Columns".

To add data columns to the display, search by keyword or click on "Browse All Display Columns" (see next slide for "all display columns")
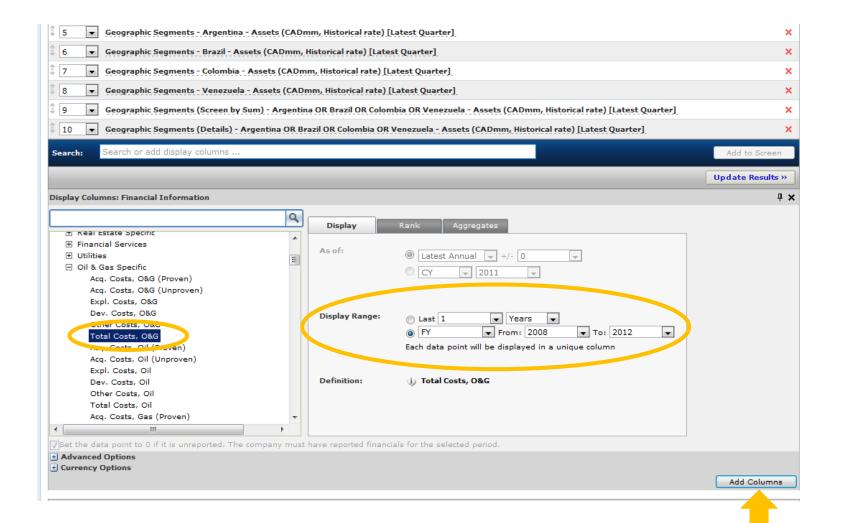
* Currently displayed data columns

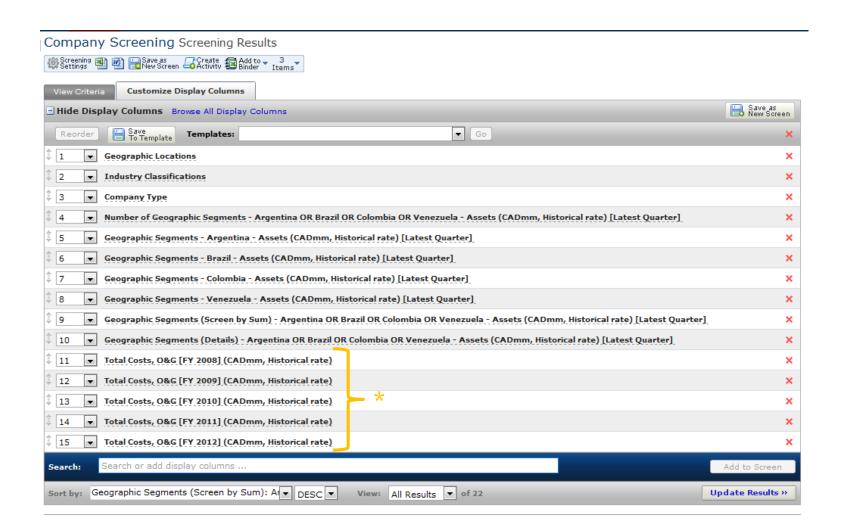Click on a topic to display available data fields under that topic.

Expand categories to select the data items you wish to add to your display. You will then have options for data range, etc. Click on "Add Columns".

New data fields are added to the display summary. Note that each year of historical data occupies one column. Click on "View Results".

* Newly added columns

Updated results will be displayed with the new columns added. Results may be downloaded to Word or Excel.