How to Download Company Data from S&P Capital IQ: Examples

A. Company Search

1. Click on Companies under the Companies tab.

2. Search by company name or ticker, and click on Search.
3. Click on the name of the desired company.
4. Note the Primary Industry Classification. This will come in handy when researching your industry in S&P Capital IQ.
5. Note links on the left-hand side of the screen, which will lead to more data about your company.

Tip: Click on Key Stats under Financials/Valuation, change Currency, Conversion, etc. as desired, use the date slider to change the date range as desired (future estimates may be included), and click on Download Financials near the top of the screen to download all company profile financials for your company.
B. Chart Builder

1. Click on **Chart Builder** under the **Charting** tab.

![Chart Builder Image]

2. To select one or more companies for your chart, (a) click on **Lookup** next to **Entity**, (b) type in the name of the company and (c) click on **Search**, (d) click on the name of the desired company, and (e) click on **Select**. Repeat (a) to (e) for one or more other companies if you want to compare companies. (f) Click on **Apply**.

![Chart Builder Process Image]
3. To select the metric(s) for your chart, (a) click on **Lookup** next to **Metric**, click on the desired tab, drill down to the desired metric, and click on **Apply**.

4. Click on **Add to Chart 1**.
5. You may adjust the date range for your data. Clicking on Max will return all available data. Click on the Export Chart to Excel icon to download your chart and the supporting data in .xls format.

6. When you click on the Export Chart to Excel icon, a separate window will appear, and a Download link will appear once the data is ready. Click on Download to start the download process.

C. Screening

1. Click on Companies under the Screening tab.
2. To select your company, scroll down the screen and click on Add Companies under List Management.

3. (a) Enter the company name, (b) click on Go, (c) click on the name of the desired company, (d) click on the arrow to move the company over to Selected Companies, and (e) click on Add Criteria.
4. You are now ready to customize your display columns. Click on **Customize Display Columns**.

![Customize Display Columns](image1.png)

5. You may add any of the available data for your company. To demonstrate, we will add some financial data. Click on **Financial Statements** under **Financial Information**.

![Financial Information](image2.png)

6. (a) Select the desired data item and (b) date range, (c) change the **Currency Options**, and (d) click on Add Columns.

![Add Columns](image3.png)
7. You may continue to select data items (financial or otherwise) to create other columns in your data table. Once finished, click on View Results.

8. Click on the Export to Excel icon at the top of the screen to download your data to Excel. Be patient; this might take a while if you have saved a lot of data.

IMPORTANT:

Zeros and dashes in data: Zeros mean that S&P does not have that specific data item for the company for that time period but they have other financial data available; dashes mean that they have no financial data information for the company for that time period and possibly at all. Source: E-mail message from S&P Capital IQ Client Services, March 19, 2013.