



Library Resources for Financial Analysis

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Search the *A to Z Database List* for our online resources, especially our article databases and corporate financials.

1. *Finding Articles.*

Business Source Premier (EBSCO)

Full text articles from 2,300 journals in business including marketing, advertising, management, accounting, taxation, MIS, and more, BSP contains 1,100 peer-reviewed journals. “Company Profiles” tab yields product info, competitors, and a SWOT analysis. Limit to full-text only, peer-reviewed, NAICS, etc.

Business & Company Resource Center (Infotrac).

This database integrates articles with company profiles, brand information, market share data, rankings, investment reports, and company histories. Search by company name, ticker, SIC/NAICS, geographic location or other fields. Full-text articles from 3,376 sources.

General BusinessFile (Infotrac)

This database uses a good search interface to index and retrieve articles from 4,700 (3,379 in full text) business, management, and economics periodicals. Limit by peer-reviewed titles, full-text availability, or publication title. Sources include professional, trade, and consumer periodicals, plus analyst reports.

Lexis-Nexis Academic (Lexis-Nexis)

A good full-text database that uses several thousand sources ranging from U.S. and world newspapers and newswires; trade and industry journals; corporate financials (3 years data); law reviews; legal cases, and opinion polls. Use their red search bar across the top and the source feature on the right.

Wall Street Journal (Proquest Newspapers, 1984-)

This has the searchable full-text of feature articles and business notices in the Wall Street Journal, 1984 to present. “Advanced” takes you in by company name, NAICS, and product name as well as by keywords in the citation and abstract. Stock tables, available in many other places, are not found here.

2. Finding Corporate Financial Data.

Mergent Online.

Mergent thoroughly covers public company balance sheets, income statements, earnings estimates, histories, m & a info, and select financial ratios for 10,000 U. S. and 18,000 non-U.S. companies. It links to SEC filings (EDGAR) and allows full-text searching. Build a custom list for cross-company comparisons. Create an extended report on corporations in an industry, examining ratios, revenues, or working capital. Mergent is great for comparative reports. Please make sure to Log Out at end.

Standard & Poor's Net Advantage.

Net Advantage is a suite of S&P business publications. Use the top bar as your navigating aid for info on Companies, Industries, or Funds. The S&P Stock Reports contains up to 7 years of company financial data. Also here: the S&P Register of Corporations; stock reports; bond ratings; a Mutual Funds Report; a stock market advisory; and the valuable S&P Industry Surveys. The latter analyzes industry conditions, costs, competition, regulation, etc. and shows how to analyze companies in a specific industry.

3. Finding Industry Ratios Using a NAICS or SIC Code

Key Business Ratios (online)

Industry Norms & Key Business Ratios (print) REF HF5681.R25 I53).

KBR provides industry ratios in an SIC code arrangement. Results measure solvency, efficiency, and profitability factors. Start by clicking on the down arrow for SIC 4-number codes and entering your number. You can also search for an industry by description. Key Business Ratios is the **only** online source for industry ratios. Make sure you Log Off at end so others may use it.

Almanac of Business and Financial Ratios

REF HF 5681 .R25 A45

Sometimes referred to as "Troy," this is a very good print source for industry ratios in 13 different asset ranges. Troy's calculates from a few million IRS returns of public and private companies.

Annual Statement Studies Risk Management Assoc. "RMA" [annual]

REF HF5681 .B2 R58

Subtitled "financial ratio benchmarks," this print source provides 16 ratios for industries in retail, wholesale, and manufacturing. RMA is arranged by NAICS and is indexed for SIC. It sorts companies by asset size and by sales to calculate, Quick, Current, Sales/Receivables, and other measures. Read the intro.

101 Business Ratios

REF HF 5657.4 .G38 1993

What does a business ratio tell you? This handy little guide explains various financial ratios and measures of sales, profit, debt, capital, efficiency, and other business activities.

4. Finding Industry Surveys

Standard and Poor's NetAdvantage - Industry Surveys

S&P specialists track 52 industries in these high quality industry analyses ranging from Advertising to Wireless Communication. Each entry examines an industry's business and legal environment, regulation, competition, consumer and economic trends. The specialists also give advice on how to analyze a company in a specific industry. The reports are rich and detailed.

Mergent Online (above)

See the tab “Industry Reports” in Mergent for detailed reports on the framework, health, and competitiveness of individual industries in Asia, North America, and Europe.

Business Source Premier (above)

BSP contains industry info from Datamonitor, sometimes broken down by country. Using the green bar at top, click “Indexes” and select “NAICS Code or Description.” Another way is to look for the “Industry Reports” icon at the top of your search results screen.

Mergent’s Industry Review semi-annual, print

REF HG 4961 .M68

This statistical source covers 137 industry groups and approximately 8,000 companies that inhabit them. Designed to allow you to compare companies within one industry, Mergent’s Industry Review lists revenues, growth rates, return on capital, share price, and business ratios such as p/e or current in tables.

Value Line Investment Survey.

Value Line ranks 100 industries for their investment prospects in succinct 1- page analyses.

Addendum 1: How to Find Industry Codes (“SIC” and “NAICS”).

Industry codes describe a specific line of business. 722211, e. g, is the (NAICS) code for restaurants in the North American Industry Classification. Industry codes allow you to identify an industry, then search for all public companies within that industry.

Since 1999 the preferred code is the NAICS, which better represents service and technology industries. But the 1987 industry code, the Standard Industrial Classification (SIC) is still used or referred to. Here’s how to look them up:

Locate a North American Industry Classification (2002):

- ❑ *North American Industry Classification System* (Ready Ref PREX 2.6/2:IN27/2002)
- ❑ <http://www.census.gov/pub/epcd/www/naics.html>
- ❑ Or in financial databases such as Mergent Online.

Locate a Standard Industrial Classification (1987) number:

- ❑ *Standard Industrial Classification Manual, 1987* (Ready Ref PREX 2.6/2:IN27/1987)
- ❑ <http://www.osha.gov/oshstats/sicser.html>
- ❑ Or in financial databases such as KBR: Key Business Ratios.

Addendum 2: how to create a company comparison report in Mergent Online.

There are at least two ways to do this. One is to conduct a search by industry from the Mergent home search page. The public companies within this numerical range will be displayed. You may check off all or some of the companies, up to 500 in all. You’ll see your checked companies in a list in the upper right hand corner. Clicking on “Analysis” in that corner, you can ask for a comparison report.

The next screen allows you to select from among company information, financials, and ratios. Within each of these you may ask for more specific information. An example might look like this for 121 companies in the SIC Industry 5812, "Eating Places."

Company Information

City, state, no. of employees

Financials

Income from continuing operations

Total assets

Total liabilities

Ratios

Current ratio

Quick ratio

Profit margin

Return on assets

Since you're building a spreadsheet, make sure you check the box "*Include average in heading*" so you'll have a view of the 50th percentile. Then choose a year and click "Create Report." You can download the results.

Have a question? Contact the Reference Librarian at 303-458-4031 or by e-mail: library@regis.edu

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