# Reuters Search 4.5.1 User Guide

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REUTERS

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# CHAPTER 1 INTRODUCING THE REUTERS KOBRA DOCUMENTATION

**Contents**


- Using This Guide
- Conventions Used in This Guide
- Reuters Kobra Guides and Online Help
- Reuters PowerPlus Pro Guides and Online Help
- How To Perform a Full Text Search

# Using This Guide

**What this guide explains**

The *Reuters Search 4.5.1 User Guide* explains how to:

- search for financial information within the Reuters Database (RDB)
- display the results of your search in varying formats

**Intended audience**

The *Reuters Search 4.5.1 User Guide* is intended for financial experts, such as traders, portfolio managers, and middle office managers.

**How this guide is organized**

The *Reuters Search 4.5.1 User Guide* is organized in:

- one introductory chapter which explains basics
- a chapter per type of search available

**How to use this guide**

First read "Conventions Used in This Guide" on page 9 to familiarize yourself with the manner in which information is presented and the terminology used in this guide. Then read the chapters of this guide that describe the types of search to conduct.

# Conventions Used in This Guide

## Text

| Convention | Explanation |
|---|---|
| *italics* | Menu names and items, command buttons, and titles of guides |
| “Text in quotation marks” | References to chapters or sections<br>Messages displayed |
| **bold** words or phrases | Emphasizes an explanation |
| **1. Numbered bold text** | A series of actions that you perform in the defined order |
| ◆ **Bold text** | A one-step procedure to perform |
| `courier font` | User input, directories, file names, and contents |
| `<courier_italics>` | Site-specific variables or parameters |
| ➤ | Sequence of menu items to choose |
| `root#`<br>`any_other_user$` | The user that you must be to enter a command |

## Terminology

| Term | What You Do |
|---|---|
| Activate | Place the cursor over the item and click |
| Choose | Make a choice from two or more available menu items |
| Click | Quickly press and release the mouse button while the cursor is over the item |
| Double-click | Quickly press and release the mouse button twice in succession while the cursor is over the item |
| Drag and drop | Press and hold the mouse button while the cursor is over the item, then move the cursor to the required position, and then release the mouse button |
| Enter | Type in data |
| Highlight | Place the cursor over a row in a table (or a cell in a matrix) and quickly press and release the mouse button while the pointer is over the item |
| Press | Press a key on your keyboard |

# Reuters Kobra Guides and Online Help

## PDF guides

The Reuters Kobra guides are delivered as Adobe PDF files in the `\common\doc\pdf\kobra` directory that you can display on-screen and print using Adobe Acrobat Reader (also delivered with Reuters Kobra).

| See the: | To: |
|---|---|
| *Kobra 4.5 Getting Started Guide* | Create and use Flex documents in Run Mode |
| *Kobra 4.5 SR1 Workspace Designer Guide*<br>• *Kobra 4.5 SR1 Realtime Objects Designer Guide*<br>• *Kobra 4.5 SR1 SR1 Control Objects Designer Guide*<br>• *Kobra 4.5 SR1 Accessory Objects Designer Guide*<br>• *Kobra 4.5 SR1 Windows Objects Designer Guide*<br>• *Kobra 4.5 SR1 Spreadsheet Object Designer Guide*<br>• *Kobra 4.5 SR1 Database Objects Designer Guide* | Use Reuters Kobra and design sheets using Reuters Kobra objects |
| *Kobra 4.5 SR1 Administration Guide* | Configure Reuters Kobra and familiarize yourself with the files contained in the release and the Reuters Kobra environment variables |
| *Kobra 4.5 SR1 Installation Guide* | Install Reuters Kobra |
| *Kobra 4.5 SR1 Style Guide for Integrating ActiveX Controls* | Integrate ActiveX controls in Reuters Kobra |
| *Kobra 4.5 SR1 Customizing with VBA Guide* | Develop and use scripts to work with Reuters Kobra |

## Online help

Reuters Kobra is delivered with context-sensitive and indexed online help for objects and dialog boxes. Either choose *Help* ➤ *Help Topics* or click the object or dialog box, then press *F1.*

## Examples

`Example Links.kob in the Kobra\common\examples` directory contains working copies of an example link for each of the Reuters Kobra objects.

**Note:** You must have access to the Reuters Database (RDB) to be able to follow examples using the Reuters Kobra Database Objects.

# Reuters PowerPlus Pro Guides and Online Help

## PDF files

The Reuters PowerPlus Pro guides are delivered in the `\common\doc\pdf\pppro` directory as Adobe PDF files that you can display on-screen and print using Adobe Acrobat Reader.

## PowerPlus Pro

| Title | Document Number |
|---|---|
| PowerPlus Pro 4.5 SR1 Release Notes | 4510502 |
| PowerPlus Pro 4.5 SR1 Administration Guide | 4510503 |
| PowerPlus Pro 4.5 SR1 Installation Guide | 4510530 |
| PowerPlus Pro 4.5 SR1 Workbook | 4510504 |
| PowerPlus Pro 4.5 SR1 Migration Guide | 4510505 |
| PowerPlus Pro 4.5 SR1 Functions Reference Guide | 4510531 |

## Data Engine

| Title | Document Number |
|---|---|
| 3000 Data Engine ActiveX Component Library | 4510506 |

## Adfin Analytics

| Title | Document Number |
|---|---|
| Adfin Analytics 4.70 Structures User Guide | 4510507 |
| Adfin Bonds Function Guide | 4510508 |
| Adfin Bonds Theory Guide | 4510509 |
| Adfin Credit Function Guide | 4510510 |
| Adfin Credit Theory Guide | 4510511 |
| Adfin Dates Function Guide | 4510512 |
| Adfin Dates Theory Guide | 4510513 |
| Adfin Exotics Function Guide | 4510514 |
| Adfin Exotics Theory Guide | 4510515 |
| Adfin Forex & MM Function Guide | 4510516 |

| Title | Document Number |
|---|---|
| Adfin Forex & MM Theory Guide | 4510517 |
| Adfin Options Function Guide | 4510518 |
| Adfin Options Theory Guide | 4510519 |
| Adfin Swaps Function Guide | 4510520 |
| Adfin Swaps Theory Guide | 4510521 |
| Adfin Term Structure Function Guide | 4510522 |
| Adfin Term Structure Theory Guide | 4510523 |
| Adfin Utilities Function Guide | 4510524 |
| Adfin Utilities Theory Guide | 4510525 |

### Adfin Real Time

| Title | Document Number |
|---|---|
| Adfin Real Time 4.70 User Guide | 4510526 |

### AdfinX

| Title | Document Number |
|---|---|
| AdfinX Analytics 1.0 Component Library User Guide | 4510527 |
| AdfinX Analytics 1.0 Function Library User Guide | 4510528 |
| AdfinX Real Time 1.0 Library User Guide | 4510529 |

### Help on Excel

Help specific to Microsoft Excel is not provided in the Reuters PowerPlus Pro help system. To view Excel help topics, choose Help from the Excel menu, then choose Microsoft Excel Help Topics or, press F1 from a spreadsheet.

# How To Perform a Full Text Search

## Before you begin

You must have either Adobe Acrobat Reader 4.0 with Search or Adobe Acrobat Reader 5.0 installed on your workstation before you can perform a full text search. You must also set up the index (see How to set up the index below).

## How to perform a full text search

| Step | Action |
|---|---|
| 1 | **Click in Adobe Acrobat Reader.**<br>Alternatively, press *Ctrl+Shift+F*. |
| 2 | **Enter the text for your search inquiry, then click *Search*.**<br>You can enter a number, word, phrase, or term using wild card characters (*, ?) and operators (=, ~, !, Boolean, and comparison). |
| 3 | **Choose a guide in *Search Results* by highlighting a guide and clicking *View.***<br>Adobe Acrobat highlights the first hit or hits that match your inquiry. |
| 4 | **Navigate within a guide by clicking:**<br>• to go to the **next** highlight (alternatively, press *Ctrl+]*)<br>• to go to the **previous** highlight (alternatively, press *Ctrl+[*)<br>• to perform another search (alternatively, press *Ctrl+Shift+F*) |
| 5 | **Navigate from guide to guide by:**<br>• pressing *Ctrl+Shift+]* to search the next guide in *Search Results*<br>• clicking (or pressing *Ctrl+Shift)* or to choose another guide in *Search Results* |

## How to set up the index

You only need to perform this procedure once.

| Step | Action |
|---|---|
| 1 | **Choose *Edit* ➤ *Search* ➤ *Select Indexes* in Adobe Acrobat Reader.**<br>Alternatively, press *Ctrl+Shift+X*. Adobe Acrobat displays *Index Selection*. |
| 2 | **Click *Add*.**<br>Adobe Acrobat displays *Select Index*. |

| Step | Action |
|---|---|
| 3 | **Enter:**<br>`<install_directory>\common\doc\pdf\<product_name>\<product_name>_index.pdx`<br>For example:<br>`C:\Program Files\Reuters\Common\doc\pdf\xtra\xtra_index.pdx` |
| 4 | **Click *Open.***<br>Adobe Acrobat displays the index in the *Available Indexes* list. |
| 5 | **Remove any other indexes in the list (such as the Acrobat guides) then click *OK*.**<br>Removing indexes improves response time and avoids unnecessary search results. |

# CHAPTER 2 GETTING STARTED WITH REUTERS SEARCH

**Contents**


- Introducing Reuters Search
- Background on the Reuters Database
- How to Start Reuters Search
- A Look at Reuters Search
- How to Search for Any Type of Instrument by its Name or Code
- How to Search for a Specific Instrument Type
- How to Display the Results of a Search
- How to Open, Close, and Save Search Files

# Introducing Reuters Search

## What Reuters Search does

Reuters Search enables you to search for, retrieve, and display financial information from the Reuters Database (RDB). The search is based on the criteria that you enter for chosen attributes of a market sector. When you perform a search, the items that match the search criteria are displayed in a results pane.

**Important!** Reuters Search is only available if you have purchased Reuters 3000 Xtra.

## What you can find

Usually the items you find are instruments. For example, searching the options market sector enables you to find options. However, in the following two market sectors you can find more than one type of item:

- in the equities market you can find company details (for example, for the Air and Water Technologies Corporation), and issue details (for example, British Petroleum common stock)
- in the indices market you can find indices (for example, the AMEX International Market Index), and vendors (for example, the American Stock Exchange)

**Note:** Market sector searches are performed within the chosen market sector only. For example, you cannot use the same search to find both equities and options.

## Market sectors

There are a number of market sectors which you can search, and you can search for any type of instrument within all markets.

# Background on the Reuters Database

## About the RDB

The Reuters Database (RDB) is the reference database containing historical data and financial instruments. A request for data by Reuters Search to the RDB returns any relevant data found in the database, according to the search request criteria.

## What you can access

The database contains data for securities and treasury instruments.

## What securities data you can search for

For securities instruments, you can access the following types of data in the RDB:

- price history for equities, indices, and key money rates
- index constituents and weights
- historical company fundamental data
- over 100 derived fields per equity, such as standard ratios and growth rates

## What treasury data you can search for

For treasury instruments, you can access the following types of descriptive data in the RDB:

- coupon attributes
- credit ratings
- debt type
- issue data
- maturity dates
- currencies

# How to Start Reuters Search

**From the Windows Start menu**

| Step | Action |
|---|---|
| ◆ | Choose *Start* ➤ *Find* ➤ *Reuters Data.* |

**From Kobra**

| Step | Action |
|---|---|
| 1 | Choose *Edit* ➤ *Find Reuters Data.* |
| 2 | Click *Find Reuters Data* . |
| 3 | Choose *Reuters* ➤ *Reuters Search.* |
| 4 | Press *Control-f.* |

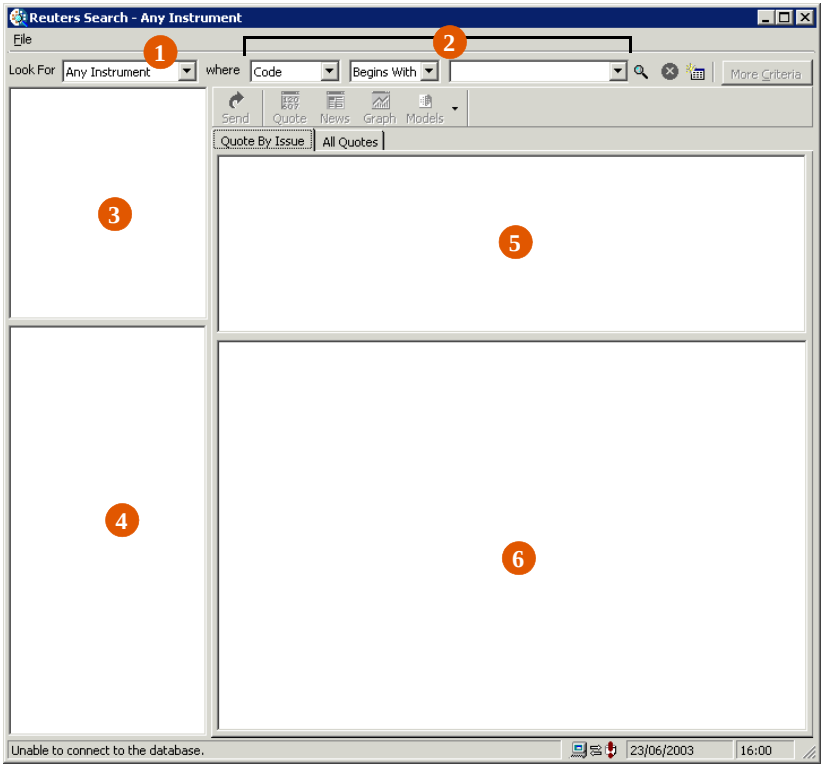
**From PowerPlus Pro**

| Step | Action |
|---|---|
| ◆ | Choose *Reuters* ➤ *Reuters Search.* |

# A Look at Reuters Search

## Reuters Search window

When you start Reuters Search, you see the following window.




| Item | Description |
|---|---|
| 1 | Enables you to choose which type of instrument or asset class you want to search. |
| 2 | Selection of text boxes and lists which enable you to specify the basic criteria for a search. |
| 3 | Lists all the asset classes found during the search. |

| Item | Description |
|---|---|
| 4 | Lists all the items that relate to the asset class that you have chosen. |
| 5 | Lists all the issues that relate to the type of instrument that you have chosen. |
| 6 | Lists all the quotes that relate to the type of instrument that you have chosen. |

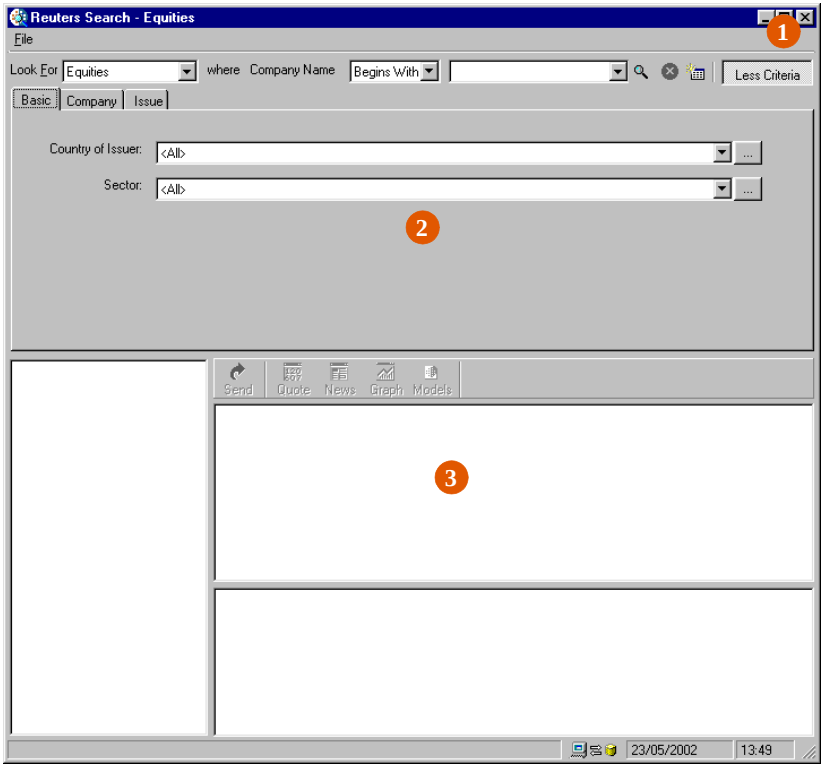
## Reuters Search modes

You can use Reuters Search in one of two modes. You can:

- search for any type of instrument by specifying simple search criteria
- define multiple criteria to search for a specific type of instrument or asset class

## Searching for a specific type of instrument

This illustration shows what Reuters Search looks like when you are performing a search using multiple criteria. Note that the display changes according to which asset class you have chosen.



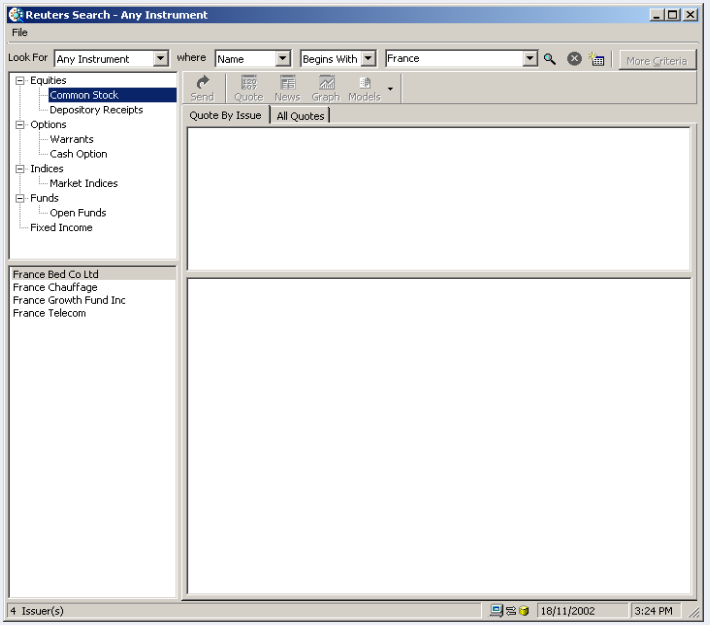

| Item | Description |
|---|---|
| 1 | Click to display or hide advanced criteria.<br>**Note:** Advanced criteria are not available for the *Any Instrument* asset class. |
| 2 | Use this section to specify more criteria and narrow down the search. |
| 3 | Lists all the items that are retrieved as the result of a search. |

# How to Search for Any Type of Instrument by its Name or Code

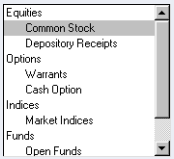
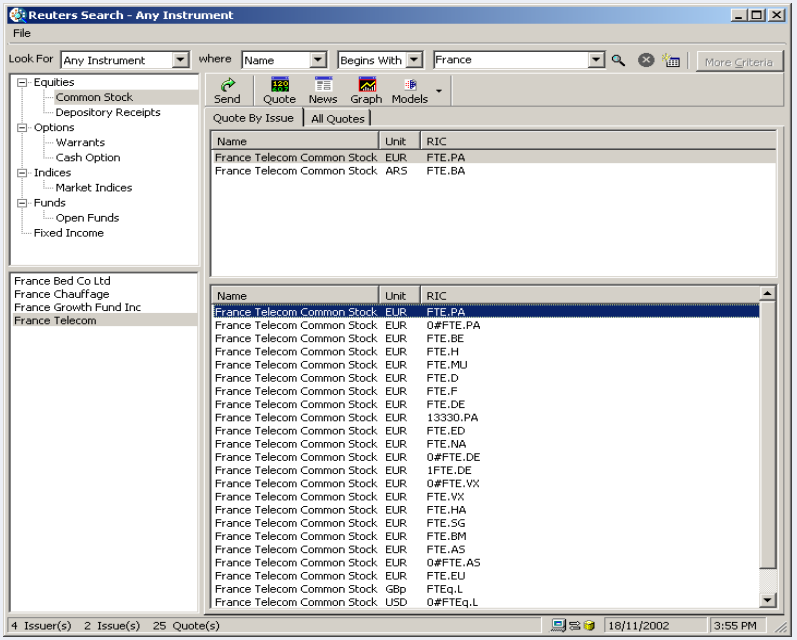
**How to search for any type of instrument**

| Step | Action |
|---|---|
| 1 | **Click the *Look For* list and choose *Any Instrument*.** |
| 2 | **Use the text boxes to the right of the *Look For* list to further define the criteria for a search.** |
| 3 | **Choose one of the following from the first list:**<br>• *Code* to search for an instrument by its code in all code schemes<br>• *Name* to search for instruments by their name<br>• A particular code scheme from the list, to search for an asset class by a code in a particular code scheme |

| Step | Action |
|---|---|
| 4 | **Click *Find Reuters Data*** **.**<br>The Searching logo is displayed while data is retrieved from the Reuters Database. Reuters Search then displays the results.<br>**Note:** If you want to abort the search, click . |



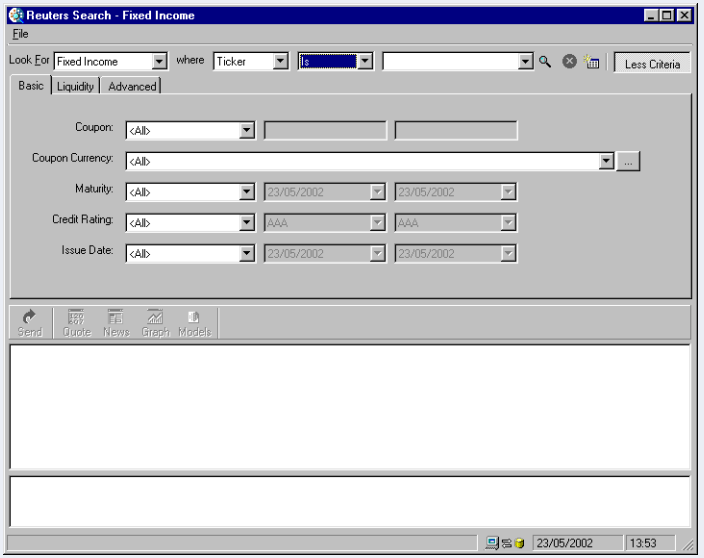
## How to categorize the results by asset class

| Step | Action |
|---|---|
| 1 | **Choose an asset class from the list.**<br>  <br><br>Reuters Search classifies the results by asset class and displays them in *Quote By Issue* and *All Quotes*.<br>Reuters Search shows the primary issues that relate to the chosen instrument in *Quote By Issue*. |
| 2 | **Choose an issue from the list in *Quote By Issue*.**<br>Reuters Search lists corresponding quotes in a separate pane.<br>  <br> |
| 3 | **Choose *All Quotes* to display all quotes in a single pane regardless of the primary issue.** |

# How to Search for a Specific Instrument Type

**How to search for an instrument type**

| Step | Action |
|---|---|
| 1 | **Choose the *Look For* list.**<br>The list shows the following instruments or asset classes:<br>• *Economic Indicators*<br>• *Equities*<br>• *Fixed Income*<br>• *Funds*<br>• *Indices*<br>• *FX / Money*<br>• *Options*<br>• *Warrants* |
| 2 | **Choose the instrument type that you want to search from the list.**<br>The interface changes according to your choice. |
| 3 | **Use the text boxes and lists to the right of the *Look For* box to specify the basic criteria of the search.** |

| Step | Action |
|---|---|
| 4 | **Click *More Criteria*.**<br>For each instrument type, Reuters Search displays specific advanced criteria which enable you to narrow down your search.<br>  <br><br>Reuters Search shows the most frequently used criteria in the first two tabs, and all other criteria in the third tab. |
| 5 | **Clicking ... opens a dialog box from which you can choose specific criteria.**<br>Click the single chevron buttons to move a chosen item to the right-hand pane. Click the double chevron buttons to move all items to the right-hand pane. |
| 6 | **Click *Find Reuters Data* to search for items in the Reuters Database.**<br>Reuters Search displays items retrieved from the Reuters Database that relate to your specific search criteria in the results pane. |

# How to Display the Results of a Search

**Purpose**

You can display the results of a search in Kobra, in either tabular or graphic form.

**Toolbar buttons**

This illustration shows the toolbar that Reuters Search displays in the results pane.

**How to display the results in Kobra**

| Choose: | To display: |
|---|---|
| *Quote* | quotes in the Kobra *Quote Browser* that relate to chosen items in the results. |
| *News* | news headlines in the Kobra *News Browser* that relate to chosen items in the results. |
| *Graph* | a graph in the Kobra *Graph Browser* that relates to a chosen item in the results. |
| *Models* | a model that relates to chosen items in the results. |

**See also**

- Kobra Realtime Objects Designer Guide for information on using browsers.

# How to Open, Close, and Save Search Files

**Options available in the *File* menu**

| Choose: | To: |
|---|---|
| *New Search* | perform a new search by returning the user interface to the default settings. |
| *Open* | open the *Open* dialog box to open a search file. |
| *Save* | open the *Save As* dialog box to save an existing search file. |
| *Save as* | open the *Save As* dialog box to save a new unnamed search file. |
| *Close* | close the Reuters Search application. |

**Note:** You cannot save *Any Instrument* searches.

# CHAPTER 3 SEARCHING FOR CAPITAL MARKETS CRITERIA

**Contents**


- How to Search for Money Market Instruments
- How to Narrow Down Your Search for Money Market Instruments
- How to Search for Fixed Income Instruments
- How to Narrow Down Your Search for Fixed Income Instruments
- How to Search for Equity Market Instruments
- How to Narrow Down Your Search for Equity Instruments

# How to Search for Money Market Instructions

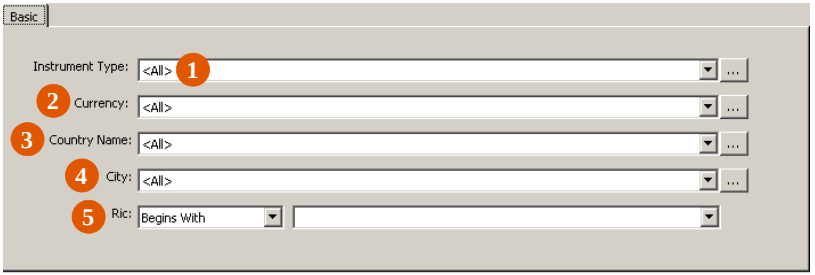
## How to search for money market instruments

| Step | Action |
|---|---|
| 1 | **Choose *FX / Money* from the *Look For* list.** |
| 2 | **Choose one of the following from the *where* list:**<br>• *Contributor* and enter a term, or partial term, in the text box<br>• *Currency Code* and enter a term, or partial term, in the text box<br>• *Country Name* and enter a term, or partial term, in the text box<br>• *Instrument Type* and enter a term, or partial term, in the text box |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Money Market Instruments" on page 31 below. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>The results of your search are displayed in the results pane. |

# How to Narrow Down Your Search for Money Market Instruments

## Basic tab

This illustration shows the options Reuters Search displays when you click *More Criteria*.




| Item | Description |
|---|---|
| 1 | Enables you to open a dialog box to choose the type of money market instruments that you want to include in your search. You can choose as many instruments as you want. |
| 2 | Enables you to open a dialog box to choose the currencies in which money market instruments are sold. You can choose as many currencies as you want. |
| 3 | Enables you to open a dialog box to choose the countries in which money market instruments are issued. You can choose as many countries as you want. |
| 4 | Enables you to open a dialog box to choose the cities in which money market instruments are issued. You can choose as many cities as you want.<br>**Note:** If you choose a city as a criterion, you do not need to include a country as part of your search criteria. |
| 5 | Enables you to enter all or part of the Reuters Instrument Code. |

# How to Search for Fixed Income Instruments

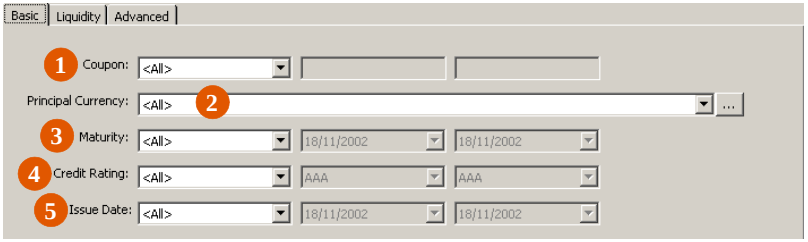
**How to search for fixed income data**

| Step | Action |
|---|---|
| 1 | **Choose *Fixed Income* from the *Look For* list.** |
| 2 | **Choose one of the following from the *where* list:**<br>• *Ticker* and enter a ticker in the right-hand text box.<br>• *Issuer* and enter an issuer name in the right-hand text box.<br>• *Bond (TCM)* and enter a bond name (ticker coupon maturity) in the right-hand text box. |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Fixed Income Instruments" on page 33 for details. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>The results of your search are displayed in the results pane. |

# How to Narrow Down Your Search for Fixed Income Instruments

## Basic tab

This illustration shows the options Reuters Search displays on the *Basic* tab when you click *More Criteria*...




| Item | Enables you to enter: |
|---|---|
| 1 | a value for the coupon.[1] |
| 2 | the currency in which the coupon in paid. Click ... to open a dialog box from which you can choose a currency. |
| 3 | a maturity date for the item(s) you are searching for.[1] |
| 4 | a credit rating for the issuer you are searching for. [1] |
| 5 | the issue date of the fixed income instrument.[1] |

1. This value can be a range. See "How to search for ranges" on page 33 below.

## How to search for ranges

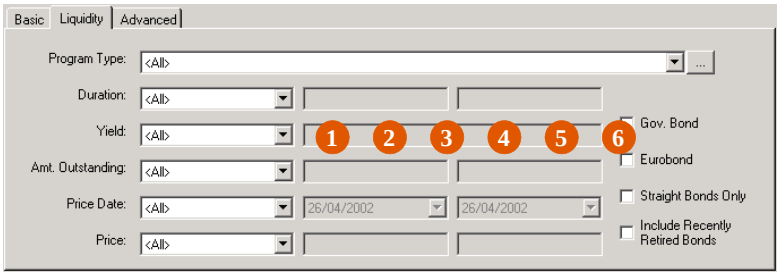
You can specify ranges for a number of fields. This table describes how you can use the available options.

| Choose: | For: |
|---|---|
| *Is* | an exact match. |
| *Is Not* | a value that you do not want to search for. |
| *Between* | a range of values, and enter values in both fields. (Ranges include values equal to your two entries as well as the intermediate values.) |

| Choose: | For: |
|---|---|
| *Not Between* | values that are outside of a range, and enter values in both fields. |
| *Greater Than* | values greater than or equal to your entry. |
| *Less Than* | values less than or equal to your entry. |

## Using the Liquidity tab

This illustration shows the options Reuters Search displays on the *Liquidity* tab when you click *More Criteria*.

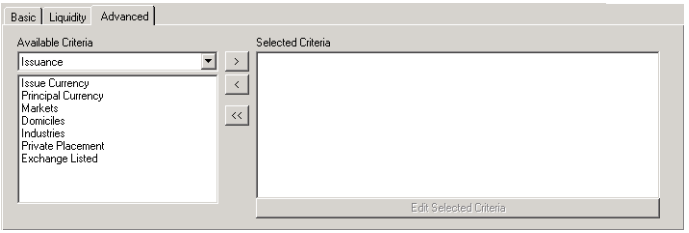



| Item | Enables you to: |
|---|---|
| 1 | open a dialog box to choose the type of program you want to search for. You can choose as many programs as you want. |
| 2 | choose the modified duration that the fixed income items have.[1]<br>Activate *Euro Bond* on the *Liquidity* tab to include bonds that are issued by an international syndicate in your search. |
| 3 | specify the yield fixed income data must have.[1] |
| 4 | specify the outstanding amount the items of fixed income data must have.[1] |
| 5 | specify the date of the price.[1] |
| 6 | specify the price.[1] |

1. This value can be a range. See "How to search for ranges" on page 33.

## Using the Advanced tab

This illustration shows the options Reuters Search displays on the *Advanced* tab when you click *More Criteria*.




## How to specify issuance types

| Step | Action |
|---|---|
| ◆ | **Choose *Issuance* from *Available Criteria*, and choose the items described in the following table to narrow your search.** |

| This item | Enables you to: |
|---|---|
| *Issue Currency* | open a dialog box to choose issuer currencies in which fixed income items are sold. You can choose as many currencies as you want. |
| *Principal Currency* | open a dialog box to choose the principal currencies in which fixed income items are sold. You can choose as many currencies as you want. |
| *Markets* | open a dialog box to choose markets in which fixed income items are sold. You can choose as many markets as you want. |
| *Domiciles* | open a dialog box to choose issuer domiciles. You can choose as many domiciles as you want. |
| *Industries* | open a dialog box to choose fixed income items by issuers' primary industrial sectors, including governments and supranational organizations. You can choose as many industries as you want. |
| *Private Placement* | search for capital that has been raised via private rather than public placement. |
| *Exchange Listed* | search for issues listed on an exchange. |

## How to specify redemption/ payments criteria

| Step | Action |
|---|---|
| 1 | **Choose *Redemption/Payments* from *Available Criteria*.** |
| 2 | **Choose a criterion from the list to open a dialog box.**<br>See "Description of redemption/ payments criteria" on page 36 for details about the available criteria. |
| 3 | **Choose *Yes* to include the criteria in your search, choose *No* to exclude the criteria, or leave blank to ignore them.**<br>Reuters Search places chosen items in *Selected Criteria*. |
| 4 | **Click *Edit Selected Criteria* to modify your choices.** |

## Description of redemption/ payments criteria

| This criterion | Enables you to search for: |
|---|---|
| *Call* | redemption types with call options. |
| *Put/Extend* | redemption types with putable or extendible options. |
| *Sinking Fund* | sinking fund redemption types. |
| *Indexed* | index-linked principal values. |
| Payment in Kind | items with principal payment in kind provisions. |
| *Partly Paid* | items with principal partly paid provisions. |
| *FRN* | items with floating-rate note. |
| *Multi/Step* | items with multi/stepped coupons. |
| *Dual Currency* | items that are sold in two currencies. |
| *Convertible* | bonds issued by a company that can be converted into shares in that company during the life of the convertible. |
| *Perpetual* | bonds with no maturity date. |

# How to Search for Equity Market Instruments

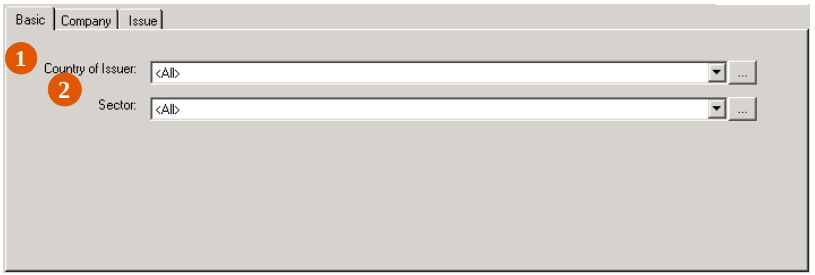
### How to search for equity data

| Step | Action |
|---|---|
| 1 | **Choose *Equities* from the *Look For* list.** |
| 2 | **Enter a company name, or partial name, in the *Company Name* text box.** |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Equity Instruments" on page 38 for details. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>Reuters Search displays the results of your search in the results pane. |

# How to Narrow Down Your Search for Equity Instruments

## Basic tab

This illustration shows the first tab in the advanced criteria pane.

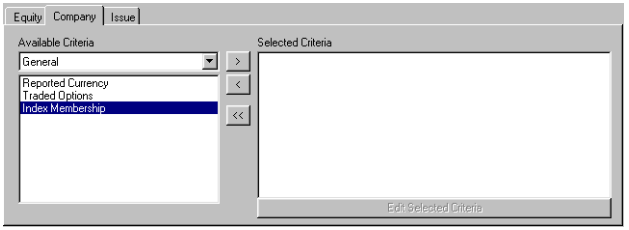



| Item | Enables you to: |
|---|---|
| 1 | Click ... to open a dialog box to choose countries in which equities are issued.[1] |
| 2 | Click ... to open a dialog box to choose industry codes.[1] |

1. You can choose as many items as you want.

## Company tab

This illustration shows the *Company* tab in the advanced criteria pane.




## How to specify general company criteria

| Step | Action |
|---|---|
| ◆ | **Choose *General* from *Available Criteria*, and refer to the following table for details about the available items** |

| This criteria | Enables you to: |
|---|---|
| *Reported Currency* | open a dialog box to choose the currency in which the stock is listed. You can choose as many currencies as you want. |
| *Traded Options* | choose whether or not options are traded on exchanges. |
| *Index Membership* | open a dialog box to choose the indices from which stocks are issued. You can choose as many indices as you want. |

### How to specify profit/loss income statement criteria

| Step | Action |
|---|---|
| ◆ | **Choose *Profit/Loss Income Statement* from *Available Criteria*, and refer to the following table for details about the available items** |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *Sales/Revenue* | income status of a company. |
| *Earning/Net Attributable* | earning to net attributable ratio for a company. |
| *Operating Profit* | profit made by a company. |
| *Pre Tax Profit (Loss)* | pre tax profit of a company. |
| *Indicated Dividend Cover* | dividend cover. |
| *Historical Dividend Cover* | dividend cover for previous years. |

### How to specify balance sheet criteria

| Step | Action |
|---|---|
| ◆ | **Choose *Balance Sheet* from *Available Criteria*, and refer to the following table for details about the available items** |

| This criteria | Enables you to enter: |
|---|---|
| *Shareholders' Equity* | a value for the shareholders' equity of a company. |
| *No. of employees* | the number of employees in a company. |

| This criteria | Enables you to enter: |
|---|---|
| *Total Assets* | a value for the total assets of a company. |
| *Total Liabilities* | a value for the total liabilities of a company. |

## How to specify market ratios and statistics for a company

| Step | Action |
|---|---|
| ◆ | **Choose *Market Ratios and Statistics* from *Available Criteria*, and refer to the following table for details about the available items** |

| This criteria | Enables you to: |
|---|---|
| *Market Capitalization (USD)* | enter the value of a company in terms of its market capitalization in US dollars. |

## How to specify the asset ratio for a company

| Step | Action |
|---|---|
| ◆ | **Choose *Asset Ratio* from *Available Criteria*, and refer to the following table for details about the available items** |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *Debt/Equity* | debt to equity ratio of a company. |
| *Equity/Assets* | equity to assets ratio of a company. |
| *Sales/Assets* | sales to assets ratio of a company. |
| *Total Debt/Assets* | total debt to total assets ratio of a company. |

## How to specify turnover activity for a company

| Step | Action |
|---|---|
| ◆ | **Choose *Turnover Activity* from *Available Criteria*, and refer to the following table for details about the available items** |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *Receivables* | receivables due to a company. |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *Inventory* | inventory of a company. |
| *Working Capital* | working capital of a company. |

## How to specify growth rates for a company

| Step | Action |
|---|---|
| ◆ | **Choose *Growth Rates* from *Available Criteria*, and refer to the following table for details about the available fields** |

| This criteria | Enables you to: |
|---|---|
| *Sales Growth, Historical* | enter a value for the growth in sales of a company over a one year interim or five years fiscal period. |

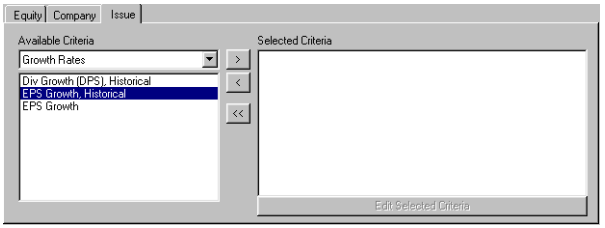
## How to specify profitability for a company

| Step | Action |
|---|---|
| ◆ | **Choose *Profitability* from *Available Criteria*, and refer to the following table for details about the available fields.** |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *ROFA* | ratio between earnings and fixed assets of a company. |
| *ROTA* | ratio between earnings and total assets of a company. |
| *Operating Margin* | operating margin of a company. |
| *Return on Equity* | net income of the company, expressed as a percentage of its equity capital. |

## Using the Issue tab

This illustration shows the *Issue* tab of the advanced criteria pane.




## How to specify general issue criteria

| Step | Action |
|---|---|
| ◆ | **Choose *General* from *Available Criteria*, and refer to the following table for details about the available items.** |

| This criteria | Enables you to open a dialog box to choose: |
|---|---|
| *Exchange* | an exchange where equities are traded. You can choose as many exchanges as you want. |
| *Currency of Quotation* | the currency in which quotations are listed. You can choose as many currencies as you want. |
| *Type of Equity* | the type of equity to search for.<br>TIP: Choose *All* to choose all types of equity, or choose one or a number of equity types. |

## How to specify market ratios and statistics criteria

| Step | Action |
|---|---|
| ◆ | **Choose *Market Ratios and Statistics* from *Available Criteria*, and refer to the following table for details about the available options.** |

.

| This criteria | Enables you to enter a value for the: |
|---|---|
| *PE, Current* | current price to earnings ratio. |
| *PE vs Local Index* | price to earnings ratio in comparison to the local index. |
| *PE vs Local Sector* | price to earnings ratio in comparison to the local sector. |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *Price to Book Ratio* | ratio of a stock's market value to its book value. |
| *Price/Book vs Local Index* | price to book ratio in comparison to the local index. |
| *Price/Book vs Local Sector* | price to book ratio in comparison to the local sector ratio. |
| *Price to Sales* | price to sales ratio. |
| *Gross Div Yield, Historical* | gross income generated by a share of stock. |
| *Gross Div Yield vs Local Index* | gross dividend yield in comparison to the local index. |
| *Gross Div Yield vs Local Sector* | gross dividend yield in comparison to the local sector. |
| *Alpha* | expected return on a share compared to the expected return on shares with a similar volatility. |
| *Beta* | volatility of a share in comparison with the market as a whole. |

## How to specify consensus estimates

| Step | Action |
|---|---|
| ◆ | **Choose *Consensus Estimates* from *Available Criteria*, and refer to the following table for details about the available options.** |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *No. of Estimates* | number of consensus estimates. |
| *No. of Estimates - Up* | number of analysts whose forecast for estimated earnings is up compared with the chosen period. This figure can be a range. |
| *No. of Estimates - Down* | number of analysts whose forecast for estimated earnings is down compared with the chosen period. This figure can be a range. |
| *No. of Estimates - Up from Total* | number of analysts out of the total number interviewed who revised their forecast for estimated earnings up. This figure can be a range. |

| This criteria | Enables you to enter a value for the: |
|---|---|
| *No. of Estimates - Down from Total* | number of analysts out of the total number interviewed who revised their forecast for estimated earnings down. This figure can be a range. |
| *Coefficient of Variation* | coefficient of variation. |
| *Forecast PE* | predicted price to earnings ratio. |
| *Forecast PE vs Local Index* | predicted price to earnings ratio in comparison with the local index. |
| *Forecast PE vs Local Sector* | predicted price to earnings ratio in comparison with the local sector. |
| *EPS Estimates Change - 1mth.* | earnings per share estimates change over a month. |
| *EPS Estimates Change - 3mth.* | earnings per share estimates change over 3 months. |

## How to specify growth rates criteria

| Step | Action |
|---|---|
| ◆ | **Choose *Growth Rates* from *Available Criteria*, and refer to the following table for details about the available options.** |

| This criteria | Enables you to: |
|---|---|
| *Div Growth (DPS), Historical* | enter a value for the dividends per share over a period of 5, 30, or 90 days. |
| *EPS Growth, Historical* | enter a value for the earnings per share over a period of 5, 30, or 90 days. |
| *EPS Growth* | enter a value for the earnings per share over a 1 year interim or 5 years fiscal. |

## How to specify price history criteria

| Step | Action |
|---|---|
| ◆ | **Choose *Price History* from *Available Criteria*, and refer to the following table for details about the available options** |

| This criteria | Enables you to: |
|---|---|
| *Closing Price* | enter a value for the closing price of a share. |
| *Price Change - Close to Close* | enter a value for the change in price of a share over a specified period of time. |
| *Price (Local Currency)* | enter a value for the issue price at which shares are sold in the local currency. |
| *Price (USD)* | enter a value for the issue price at which shares are sold in US dollars. |
| *High, Low Prices* | open a dialog box to choose a *High* or *Low* issue price that has *Occurred* or *NOT Occurred* over a period of 1 day or the previous week. |
| *Percent from High Price* | enter a value for the percent from the high issue price. |
| *Percent from Low Price* | enter a value for the percent from the low issue price. |
| *Average Volume* | enter a value for the average number of shares that are traded over 5, 30, or 90 days. |
| *Average Percentage Volume Change* | enter a value for the average percentage change in the number of shares that are traded. |
| *Stock Price vs Local Index* | enter a value for the price of the stock in comparison to the local index. |
| *Stock Price vs Local Sector Index* | enter a value for the price of the stock in comparison to the local sector index. |
| *Close Price vs Moving Average* | enter a value for the price of the stock at the end of a days trading in comparison to the average value of a stock's price over a period of 30, 60, or 200 days. |
| *RSI* | enter a value for the relative strength index over a period of 3,9, 14, or 30 days. |

| This criteria | Enables you to: |
|---|---|
| *Simple Moving Avg Intersection* | open a dialog box to specify the intersection between two simple moving average lines. |
| *Volatility (Return)* | enter a value for the volatility of the equity return over a period of 10, 30, 90, or 200 days. |
| *ADXR Indicator* | enter a value for the average directional movement rating over a period of 30, 60, or 200 days. |

## How to specify a simple moving average intersection

| Step | Action |
|---|---|
| 1 | **Choose the *Period* list and choose a combination of average lines.** |
| 2 | **Choose one of the following:**<br>• `Yes` to include an intersection in the past five days<br>• `No` to exclude an intersection in the past five days |
| 3 | **Choose one of the following:**<br>• `From Below (Buy)` to include an intersection where the short term line crosses the long term line from below<br>• `From Above (Sell)` to include an intersection where the short term line crosses the long term line from above |

# CHAPTER 4 SEARCHING FOR INDICES AND ECONOMIC INDICATORS

**Contents**


- How to Search for Indices
- How to Narrow Down Your Search for Indices
- How to Search for Economic Indicators
- How to Narrow Down Your Search for Economic Indicators

# How to Search for Indices

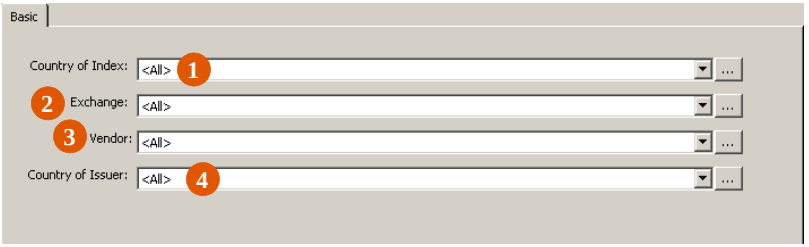
## How to search for indices

| Step | Action |
|---|---|
| 1 | **Select *Indices* from the *Look For* list.** |
| 2 | **Enter an index name, or partial name, in *Name*.** |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Indices" on page 49 for details. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>Reuters Search displays the results of your search in the results pane. |

# How to Narrow Down Your Search for Indices

## Basic tab

This illustration shows the *Basic* tab in the advanced criteria pane, from which the most commonly used criteria can be specified.




## Description of fields

This table lists the fields that you can use to specify advanced criteria.

| Item | Enables you to open a dialog box to choose: |
|---|---|
| 1 | the country in which an index is listed.[1] |
| 2 | an exchange in which indices are traded.[1] |
| 3 | a vendor from which indices are sold.[1] |
| 4 | the country in which indices are issued.[1] |

1. You can choose as many items as you want.

# How to Search for Economic Indicators

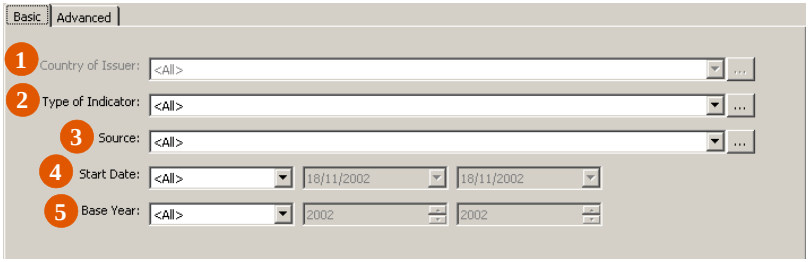
**How to search for economic indicators**

| Step | Action |
|---|---|
| 1 | **Select *Economic Indicators* from the *Look For* list.** |
| 2 | **Enter a country code, or partial code, in *Country Code*.**<br>**OR**<br>**Enter a country name, or partial name, in *Country Name*.** |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Economic Indicators" on page 51 for details on how to specify search criteria for different types of data. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>Reuters Search displays the results of your search in the results pane. |

# How to Narrow Down Your Search for Economic Indicators

## Basic tab

This illustration shows the *Basic* tab in the advanced criteria pane.

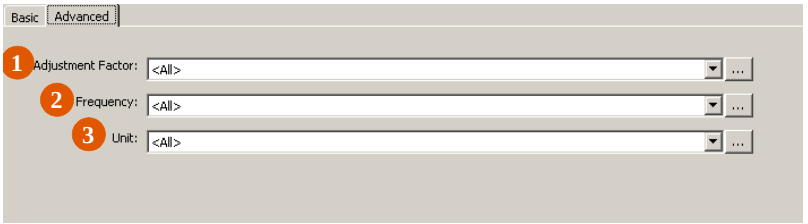



| Item | Enables you to: |
|---|---|
| 1 | open a dialog box to choose countries in which economic indicators are issued.[1] |
| 2 | open a dialog box to choose the type of indicator to search for.[1] |
| 3 | open a dialog box to choose the source from which economic indicators are listed.[1] |
| 4 | enter a start date for the item(s) you are searching for.[2] |
| 5 | enter a base year for the economic indicators.[2] |

1. You can choose as many items as you want.
2. This can be a range. See "How to search for ranges" on page 33.

## Advanced tab

This illustration shows the *Advanced* tab in the advanced criteria pane.




| Item | Enables you to: |
|---|---|
| 1 | open a dialog box to choose the type of adjustment factor to use.[1] |
| 2 | choose the frequency with which economic indicators are listed[1]. |
| 3 | choose the units in which economic indicators are listed.[1] |

1. Select *All* to include all items, or choose one or a combination of items.

# CHAPTER 5 SEARCHING FOR DERIVATIVE INSTRUMENTS

**Contents**


- How to Search for Options Contracts
- How to Narrow Down Your Search for Options Contracts

# How to Search for Options Contracts

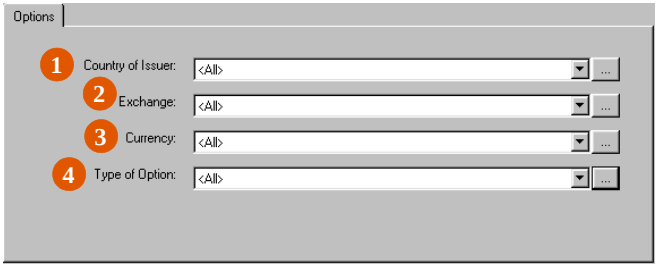
**How to search for options contracts**

| Step | Action |
|---|---|
| 1 | **Select *Options* from the *Look For* list.** |
| 2 | **Enter a name, or partial name, in *Company Name*.** |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Options Contracts" on page 55 for details. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>Reuters Search displays the results of your search in the results pane. |

# How to Narrow Down Your Search for Options Contracts

## Basic tab

This illustration shows the *Basic* tab in the advanced criteria pane.




| Item | Enables you to open a dialog box to choose: |
|---|---|
| 1 | the countries in which options contracts are issued.[1] |
| 2 | the exchanges in which options contracts are traded.[1] |
| 3 | currencies in which options contracts are sold.[1] |
| 4 | the type of option to search for. |

1. You can choose as many items as you want.

# CHAPTER 6 SEARCHING FOR WARRANTS AND FUNDS DATA

**Contents**


- How to Search for Warrants
- How to Narrow Down Your Search for Warrants
- How to Search for Funds
- How to Narrow Down Your Search for Funds

# How to Search for Warrants

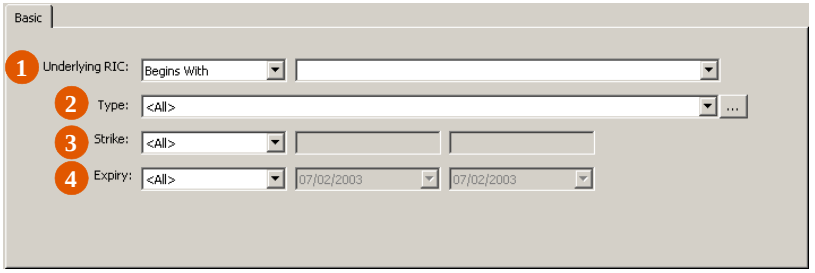
**How to search for warrants**

| Step | Action |
|---|---|
| 1 | **Select *Warrants* from the *Look For* list.** |
| 2 | **Enter the underlying stock name, or partial name, in *Underlying Stock*.**<br>**OR**<br>**Enter an issuer name, or partial name, in *Issuer*.** |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Warrants" on page 59 for details. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>Reuters Search displays the results of your search in the results pane. |

# How to Narrow Down Your Search for Warrants

## Basic tab

This illustration shows the *Basic* tab in the advanced criteria pane.




| Item | Enables you to: |
|---|---|
| 1 | enter a RIC, or partial RIC, in the *Underlying RIC* text box. |
| 2 | open a dialog box which enables you to choose to search for warrants with put options (right to sell) or call options (right to buy). |
| 3 | enter an exercise price for the warrants you are searching for.[1] |
| 4 | enter a date after which a warrant may no longer be exercised.[1] |

1. This can be a range. See "How to search for ranges" on page 33 for details.

# How to Search for Funds

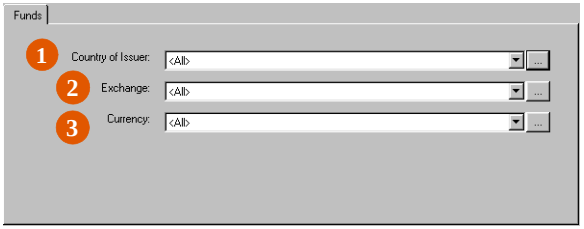
### How to search for funds

| Step | Action |
|---|---|
| 1 | **Select *Funds* from the *Look For* list.** |
| 2 | **Enter a company name, or partial name, in *Company Name*.** |
| 3 | **If you want to narrow down your search, click *More Criteria*.**<br>See "How to Narrow Down Your Search for Funds" on page 61 for details. |
| 4 | **When you have entered all the search criteria, click *Find Reuters Data* .**<br>Reuters Search displays the results in the Results pane. |

# How to Narrow Down Your Search for Funds

## Basic tab

This illustration shows the *Basic* tab in the advanced criteria pane.




| Item | Enables you to open a dialog box to choose: |
|---|---|
| 1 | a country in which funds are issued.[1] |
| 2 | an exchange in which funds are traded.[1] |
| 3 | the currency in which funds are sold.[1] |

1. You can choose as many as you want