

# BLOOMBERG EQUITY RESEARCH CASE

FI 118 Introduction to Finance – Spring 2024

This project is designed to familiarize you with the Bentley Trading Room, the Bloomberg analysis platform, as well as with equity statistics and financial ratios we will be discussing in class throughout the semester.

- 1) Look up which stocks are in the S&P 500 Index and choose any three. Look up news on each stock (from any reputable news source), and find one article for each. Record the date of the articles, the prices of the stocks, and the links - which you will later use as citations. Note the 'ticker symbol' of each of your stocks.
- 2) Set up a Bloomberg account in the Trading Room (directions attached). Trading Room staff can help you if you get stuck, but try to do this on your own.
- 3) Log into Bloomberg. Go to the main Bloomberg page and type the ticker symbol of one of your companies (eg AAPL) into the blue search box at the top left of the screen, but do not hit enter. As you finish typing the ticker you will see **SECURITIES** below. Using the mouse, select **US Equity**. Then type **DES** into the top left cursor box to get to the Profile page, where you should record the following data for each of your three stocks.

- **Px** (Price)
- **Mkt Cap** (Market Capitalization)
- **P/E** (Price Earnings Ratio)
- **Est EPS** (Estimated Earnings Per Share)
- **12M Tot Ret** (12 month total return)
- **Beta vs SPX** (stock beta compared to S&P500)

While on the **Profile** page, type GRAB in the cursor box which will take a screenshot of the page you can then email to yourself. Do this for all three stocks.



- 4) At least one week after you get the above data, log into Bloomberg. For each of your stocks, enter in the ticker, select **US Equity** and then **DES** for that stock, then tab to the **Ratios** page to get this information.

- **P/S** (Price to Sales)
- **Bk Val Per Sh** (Book Value Per Share)
- **Curr Ratio** (Current Ratio)
- **P/CF** (Price / Cash Flow)
- **OPM** (Operating Margin)

Use the GRAB function to take a screenshot of the **Ratios** page for each of your three stocks.



- 5) At least one week after the above data, log into Bloomberg. For each of your stocks, enter the ticker and go to **US EQUITY**. In the cursor bar, type GP (to graph the price.) Type GRAB in the cursor box and email yourself the chart for each of your stocks.
- 6) Look up news on each stock (any reputable source), and find one article for each. Record the date of the article, the price of the stock, and the link - which you will use as a citation. You are now ready to write the final report.

## Final Report

Write a one page equity research report (in a professional style similar to the one at right) including:

Show all of the data (in #3 and #4 above) you got from the Profile page and Ratios page for your three stocks. Define each of those statistics and ratios (eleven in total).

For each of your stocks

- Give a 2-3 sentence summary of the company and what they do.
- Briefly summarize the initial news with no use of quotations (put footnotes on page 2.)
- Give a 3-5 sentence summary of information on each stock using at least three (in total) of the ratios and statistics, showing an understanding of what the ratios/statistics mean. (e.g. With a market capitalization of only \$9.32 billion, Ralph Lauren Corp. is one of the smallest stocks in the S&P500.)
- Show the Bloomberg price chart you downloaded for that stock.
- Briefly summarize the final news with no use of quotations (put footnotes on page 2.)



All the data above should be on a single page. On the second page, please show your footnote citations as well as the six Bloomberg GRAB screenshots asked for in #3 and #4.

The professional format of the report will allow it to be potentially useful to you if you interview for an internship and the interviewer asks about your coursework. Such a report is easy for the interviewer to read and understand and can look very impressive – so make it look good!

Submit as a single pdf via TURNITIN on Brightspace.

# FI118 Introduction to Finance - How to Create a Bloomberg Login

**Bloomberg**  
<Enter> or <GO> to begin

Select Language for Analytics and Communication Functions:

✓ English	Español	한국어
日本語	Português	简体中文
Français	Italiano	Русский
Deutsch	繁體中文	

To customize your News language experience type LANG <GO> after login.

Contact Us

S/N 628230-1 | SID 3380684-2 | Version 07 May 17

The BLOOMBERG PROFESSIONAL service and data products are owned and distributed by Bloomberg Finance L.P. and its subsidiaries (BFLP) except in Argentina, Bermuda, China, India, Japan, Korea (where Bloomberg L.P. and its subsidiaries (BLP) distribute these products). BLP provides BFLP with global marketing and operational support and service for these products. BFLP and BLP believe the information herein came from reliable sources, but do not guarantee its accuracy. No information or opinion herein constitutes a solicitation of the purchase or sale of securities or commodities.

**Login Creation: Validation**

Start | User Information | Bloomberg Anywhere | **Validation** | Password

In order to proceed, we need to send you a validation code. Please choose how you would like to receive the code. We recommend using SMS Text Message because it is faster. Select or enter the phone number and click the Send Code button.

My Work Number: +1 202 407 7786  
My Mobile Number: +1 202 407 7786  
Another Number: United States + 1 - [ ]

☐ SMS Text ☐ Automated Call

**Send Code**

**Login Creation: Validation**

Start | User Information | Bloomberg Anywhere | **Validation** | Password

Once you have received the code, enter it below. Please allow at least 2 minutes to receive the validation code.

Your Phone Number: +1 202 407 7786  
Validation Code: 6316

If you have not received the code after 2 minutes, please select one of the options below.

2) I would like to send a code to a different phone number.  
3) I would like a representative to call me.

**Continue**

**Login Creation**

Start | User Information | Bloomberg Anywhere | Validation | **Password**

Let's create your Bloomberg login.

Preferred Language: English

Are you creating a login for yourself? ☒ Yes ☐ No

Have you ever been a Bloomberg client?  
☐ Yes, I know my previous login/password  
☐ Yes, but I don't remember my login/password  
☐ No

Your last Bloomberg login name: [ ]  
Your last Bloomberg password: [ ]  
You have been a Bloomberg client since: <Select>

Send a Change-of-Account Notice to users with your prior account in their Speed Dial: ☐ Yes ☒ No

**Continue**

**create your password**

Enter New Password: [ ]

Re-enter New Password: [ ]

**Create Login**

**Login Creation: User Information**

Start | **User Information** | Bloomberg Anywhere | Validation | Password

Please enter your information.

First Name: TESTZORAN  
Last Name: TESTLAZAREVIC

Work Number\*: United States + 1 - [ ] Ext. [ ]  
Mobile Number\*\*: United States + 1 - [ ]

Corporate Email Address\*\*\*: [ ]

**Put in your cell# and Bentley email.**

**Continue**

\* Work phone number can be viewed by the Bloomberg community.  
\*\* Mobile phone number will not be shared.

You are done!

It is suggested you send yourself an email with your Bloomberg ID and password as a reference.