# **RESEARCH AND ANALYSIS KEY FUNCTIONALITY**

The list below reflects key functionality for an area of interest on the Bloomberg Professional® service. Press the <Menu> key on the Bloomberg keyboard from any function to browse related tools. Press the <Help> key once from a function to learn more about what it does and how to use it.

> COMPANY ANALYSIS

> FUNDAMENTALS & DIVIDENDS

> RELATIVE VALUE & PERFORMANCE

| > | N | E١ | W | S |
|---|---|----|---|---|
|   |   |    |   |   |

| News On Bloomberg           | N    |                    |      |
|-----------------------------|------|--------------------|------|
| Multimedia Broadcasts       | AV   | Factor Backtesting | FTST |
| Bloomberg First Word        | FIRS | Equity Screening   | EQS  |
| Bloomberg Brief Newsletters | BRIE | Equity Backtesting | EQBT |
| Suggested News Filters      | STNI | Fund Screening     | FSRC |
| Company specific news       | CN*  | -                  |      |
|                             |      |                    |      |

#### > EVENTS & RESEARCH

| > EVENTS & RESEARCH          |      | Company overview      | DES*  |
|------------------------------|------|-----------------------|-------|
| Events By Company            | EVT* | Company Management    | MGMT* |
| Earnings and events calendar | EVTS | Corporate Actions     | CACS  |
| Bloomberg Industries         | BI   | Supply Chain Analysis | SPLC* |
| Research Portal              | RES  | Debt Issure Overview  | ISSD* |
| Company Specific Research    | BRC  | Capital Structure     | CAST* |
| Ananlyst Recommendations     | ANR* | Debt Distribution     | DDIS  |

#### > ECONOMIC INFORMATION

| Economic Calendars  | ECO  | Financial Analysis          | FA*   |
|---------------------|------|-----------------------------|-------|
| Economic Forecast   | ECFC | Company Filings             | CF*   |
| Economic Data Watch | ECOW | Dividend & Splits           | DVD   |
| Economic statistics | ECST | Bloomberg Dividend Forecast | BDVD* |

### > BOARD MARKET MONITORS

| WEI   | Equity Relative Valuation | <b>EQRV</b> *  |
|-------|---------------------------|--|
| IMAP* | Relative Value Comparison | RV*  |
| MMAP  | Peer Correlation Matrix   | PC*  |
| MOST* | Company Beta Analysis     | BETA*  |
| MOV*  | Comparative Returns       | COMP   |
|       | IMAP*<br>MMAP<br>MOST*    | IMAP* Relative Value Comparison  MMAP Peer Correlation Matrix  MOST* Company Beta Analysis |

#### > EARNINGS ANALYSIS

|      | > HOLDINGS                   |  |
|------|------------------------------|--|
| EA   | Current & Historical Holders | HDS  |
| BBEA | Ownership Statistics         | OWN  |
| EE*  |                              |  |
| EEO* | > CHARTING                   |  |
| EEB* | Historical Closing Prices    | GP*  |
| ERN* | Chart Library                | G*   |
|      | BBEA<br>EE*<br>EEO*<br>EEB*  | EA Current & Historical Holders BBEA Ownership Statistics EE* EEO* > CHARTING EEB* Historical Closing Prices |

<sup>\*</sup>Denotes a single-security function

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<sup>\*\*</sup>Denotes a multiple-security function

# **Bloomberg**

# **Technical Analyst**

after each command to run the function

- \* Denotes a single-security function
- \*\* Denotes a multiple-security function

## **Charts Overview**

| GRAPH | Charts main menu |
|-------|------------------|
| GEDU  | Charts education |
| CHART | Chart stories    |

# **Chart News and Seminars**

All technical analysis news NI Bloomberg technical strategy

**BLPTECSTRT** 

NI BLPTECSEM Archived technical seminars

Chart updates

**BLPCHRTUPD** 

**TDEF** Set default parameters NI TA Technical analysis news **BOOK** Bloomberg Press books

# **Charts - Historical**

\*GP Graph historical prices Historical price chart \*GPO

Candle chart \*GPC \*GPL Logarithmic chart

\*PFP Graph a point and figure chart

# **Charts - Intraday**

| *GIP   | Tick chart                                   |
|--------|--|
| *GIPS  | Scrunch chart                                |
| *GIPT  | Scrolling tick chart with B/A and volume     |
| *GIPW  | Sliding window chart                         |
| *IGPC  | Intraday candle chart                        |
| *IGPO  | Intraday bar chart                           |
| **ISGP | Graph 30 days of intraday spreads or ratios  |
| **MGIP | Graph intraday ticks for multiple securities |
|        |  |
|        |  |

## Technical Indicators - Historical

\*IRSI Intraday Relative Strength Index \*MACD Moving avg convergence/divergence \*TAS Stochastics for a selected security \*DMI Graph directional movement \*ROC Highest and lowest rates of price change

\*CMCI Commodity Channel Index

\*WLPR Williams' %R graph \*BOLL **Graph Bollinger Bands** 

\*GOC Graph Ichimoku Cloud chart \*GPF Graph prices and Fibonacci lines \*PTPS Stop-and-reversal (SAR) trading points

\*MAE Moving average envelopes \*GM Graph prices and money flow \*CHKO Display the Chaikin Oscillator \*GPCA Graph historical corporate actions

\*CNDL Candle patterns \*KAOS **Hurst Exponent** \*MCCL McClellan Oscillator

\*OBV On-balance volume for a selected security

\*PIVG Pivot points graph

# Technical Indicators - Intraday

\*IRSI Intraday Relative Strength Index \*IMAC Moving average convergence/divergence \*ITAS Intraday stochastics systems chart \*IDMI Intraday directional movement calculator \*IROC Intraday rate of change \*ICCI Commodity Channel Index \*IWLP Intraday Williams %R graph S \*IBOL Graph intraday Bollinger Bands \*IGOC Intraday prices graph \*IGPF Graph prices and Fibonacci lines \*IPTS Intraday parabolic systems chart

Moving Average Envelopes

Graph intraday money flow

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Press the <HFI P>

# Bloomberg

# **Technical Analyst**

Press after each command to run the function

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# **Advanced Charts**

| G     | Create and maintain customized charts           |
|-------|---|
| GEG   | Access a menu of sample technical charts        |
| *VAT  | Analyze volume patterns                         |
| *IGPV | Graph intraday price and VWAP                   |
| *VBAR | Trade volume graph                              |
| *VAP  | Graph volume at price bar chart                 |
| VWAP  | Snapshot of VWAP analysis                       |
| *MKTP | Market picture chart                            |
| *ECCG | Graph equity and credit default swap volatility |

\*GP E Events chart

\*GPMR View most read news stories

\*SI Monthly CEF short interest information

\*SEAG Seasonality price graph

# **Spread / Ratio Charts**

| **HS  | Graph historical price spread and ratio     |
|-------|---|
| **HSN | Normalized spread                           |
| **HSE | Graph spread of two securities              |
| **HSP | Graph the spread                            |
| **SGP | Graph price spread/ratio for two securities |
|       |   |

\*\*SGIP Intraday spread graph

\*\*ISGP Intraday spread graph (30 days)

\*\*GR Graph price, P/E, or yield ratios

\*\*GRET Graph historical price to earnings ratios

\*\*MGR Security ratios to a base index

# **Volatility**

| *GV   | CDS vs. equity volatility graph                    |
|-------|--|
| HVG   | Graph historical price/yield volatility            |
| *VCMP | Chart historical implied volatility                |
| *HIVG | Graph historical/implied volatility on commodities |
| *SKEW | Graph volatility skews                             |

# **Quantitative Analysis**

**CORR** 

| *PC    | Find equity correlation with peers              |
|--------|---|
| *RVG   | Chart a company's key financial metrics         |
| *RVC   | Display/analyze scatter data                    |
| *RVH   | Display/analyze disribution data                |
| **HRA  | Determine linear regression sensitivity         |
| MRA    | Create up to 20 regression matrices             |
| **BETA | Analyze historical beta                         |
| *TRA   | Calculate total return for a stock              |
| **COMP | Compare multiple security returns               |
| MRR    | 10 best and worst performing stocks of an index |
| IRR    | Historical index ranked returns reports         |
| MMAP   | Market map by sector/regions of the world       |
| CIX    | Create/graph custom index expressions           |
| *PIV   | Pivot calculator                                |
| *BTST  | Calculate profit and loss (P&L)                 |

Create up to 20 correlation matrices

# **Fundamental Charts**

| i unuamentai Charts |   |  |  |  |  |
|---------------------|---|--|--|--|--|
| GFV                 | Graph/compare fundamentals, estimates, and ratios |  |  |  |  |
| GF                  | Graph fundamentals                                |  |  |  |  |
| **MGF               | Compare fundamental trends                        |  |  |  |  |
| EEG                 | Chart equity price movements                      |  |  |  |  |
| GE                  | Graph historical price and market ratios          |  |  |  |  |
| RG                  | Graph/compare historical equity returns           |  |  |  |  |
| PEBD                | P/E bands/valuation                               |  |  |  |  |
| SURP                | Earnings surprise                                 |  |  |  |  |
|                     |   |  |  |  |  |

# **Screening Tools**

|      | _   |
|------|---|
| IMAP | Analyze price movements across industries |
| ALRT | Price and technical alerts                |
| EQS  | Search for equity securities              |
| ATEC | Technical patterns - global               |
| CTEC | Technical patterns - single name          |
| LTEC | Technical patterns - custom list          |

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DES\*

# **EQUITY**

# **EQUITY PORTFOLIO MANAGER**& ANALYST CHEAT SHEET

Below are the most relevant functions to your area of interest on the Bloomberg Professional<sup>®</sup> service. From any function you can press the <MENU> key on the Bloomberg keyboard to browse menus of related functions. Find specific functions or securities by entering a keyword in the command line then choosing from the Autocomplete list of matches.

|   | N/I A | DKI | ET CI | IDVE | <br>ANCE |
|---|-------|-----|-------|------|----------|
| _ | IVIA  | KAN | II JL | JRVC | ANCE     |

| World Equity Indices               | WEI  |
|------------------------------------|------|
| World Equity Indices Futures       | WEIF |
| World Bond Markets                 | WB   |
| Equity Index/Industry Group Movers | IMOV |
| Price Movements Across Industries  | IMAP |
| Most Active Stocks                 | MOST |
|                                    |      |

### > ECONOMICS

| Economic Calendars        | ECO         |
|---------------------------|-------------|
| World Economic Calendars  | WECO        |
| Economic Workbench        | <b>ECWB</b> |
| Economic Forecasts        | <b>ECFC</b> |
| World Economic Statistics | <b>ECST</b> |

### > TOP-DOWN ANALYSIS

| Earnings Season Results | EA   |
|-------------------------|------|
| Search for 13F Filings  | FLNG |
| Group Ranked Returns    | GRR  |
| Relative Rotation Graph | RRG  |
| Bloomberg Industries    | BI   |
| All Research            | RES  |

### > CHARTING & TECHNICALS

| Multiple Security Charting  | G    |
|-----------------------------|------|
| Graph Fundamentals          | GF   |
| Graphical Cross Sectional   | GX   |
| Equity and CDS relationship | ECCO |

# > IDEA GENERATION

| Equity Screening   | EQS         |
|--------------------|-------------|
| Equity Backtesting | <b>EQBT</b> |
| Fund Screening     | <b>FSRC</b> |
| Factor Backtester  | FTST        |
|                    |             |

# > M&A AND PRIVATE EQUITY

| Mergers and Acquisitions          | MA   |
|-----------------------------------|------|
| Mergers and Acquisition Arbitrage | MARB |
| Private Equity Search             | PE   |

### > COMPANY & SECURITY ANALYSIS

Company Description

| Company Description                  | DES     |
|--------------------------------------|---------|
| Top Executives and Board Members     | MGMT*   |
| Company Filings                      | CF*     |
| Company News and Research            | CN*     |
| Single Company Research              | BRC*    |
| Analyst Recommendations              | ANR*    |
| Financial Analysis                   | FA*     |
| Financial Analysis ESG               | FA ESG' |
| Bloomberg Guidance                   | GUID*   |
| Company Earnings                     | ERN*    |
| Earnings Estimates                   | EE*     |
| Bloomberg Dividend Projections       | BDVD*   |
| Dividend/Split Information           | DVD*    |
| Comparative Returns                  | COMP*   |
| Custom Peer Group Analysis           | RV*     |
| Capital Structure                    | CAST*   |
| Debt Distribution                    | DDIS*   |
| Short Interest                       | SI*     |
| Supply Chain                         | SPLC*   |
| Holdings: Ownership                  | OWN*    |
| Events Calendar                      | EVT*    |
| Bloomberg Quote                      | BQ*     |
| *Denotes a single-security function. |         |

#### > CORPORATE CALENDARS

| Corporate Events Calendar       | <b>EVTS</b> |
|---------------------------------|-------------|
| Corporate and Municipal Actions | CACT        |

#### > DERIVATIVES

| Options Monitor     | OMON |
|---------------------|------|
| Most Active Options | OMST |

### > PORTFOLIO MANAGEMENT & RISK

| Portfolio and Risk Analytics | PORT |
|------------------------------|------|
| Managing Portfolios          | PRTU |
| Historical Fund Analysis     | HFA  |
| Bloomberg Upload             | BBU  |
| Liquidity                    | LRSK |

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