

# Getting started on the Bloomberg Terminal.

Bloomberg  
for Education

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# Introduction

For more than 20 years, Bloomberg for Education has been committed to helping universities and colleges incorporate the Bloomberg Terminal® into their academic programs to better prepare students for the global job market.

Universities and colleges around the globe use Bloomberg to bring the real world of finance into the classroom, providing students with access to the same information platform used by leading decision makers in business, finance and government.

The Bloomberg Terminal seamlessly integrates the very best in data, news and analytics. The Terminal is a 24-hour, global financial services system that provides transparent and reliable financial, economic and government information covering all market sectors. It features company financials, market data spanning more than 20 years, charts, statistics, a communications platform and current news reports.

This guide is intended to provide an overview of the Bloomberg Terminal so you can get started using this powerful tool.

# The Bloomberg Terminal

## The Bloomberg keyboard

The red stop keys, green action keys and yellow market sector keys help you access information quickly and easily.



## Helpful keys



The Escape or Cancel key allows you to exit the current function and cancels the current activity on the screen.



Click on the Help button once to access a help page; click on it twice to access the Help Desk.



Enables keyword search of the entire Bloomberg database.



The yellow market sector keys enable you to:

- Load securities. **Example** – IBM US <EQUITY> <GO>
- Access market sector menus. **Example** – <CORP> <GO>



The Menu key opens a menu of related functions.



The <GO> or Enter key executes the command typed in the command line.

# The Bloomberg Terminal

## Accessing the application

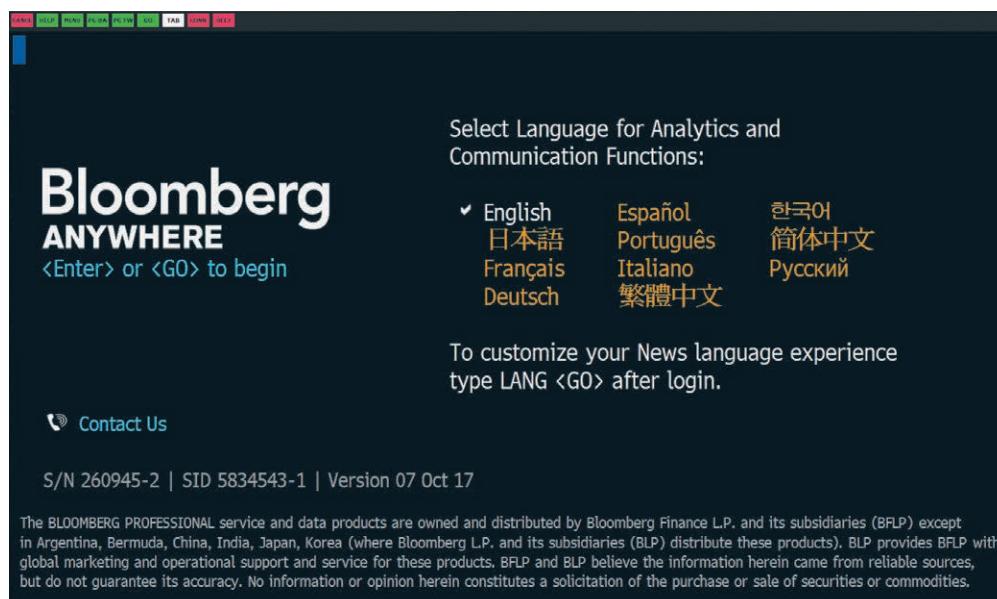
The Bloomberg Terminal delivers news, data and analytics to your desktop. You can access the application in one of the following ways:



- Double-click the green Bloomberg icon on your computer desktop.

or

- From the Windows Start menu, select START > All Programs > Bloomberg > BLOOMBERG. Once you open the application, the following Bloomberg panel ("window") appears on your desktop.



**Note** – If you have problems locating the application on the computer, consult your Information Technology department for guidance on installation and configuration.

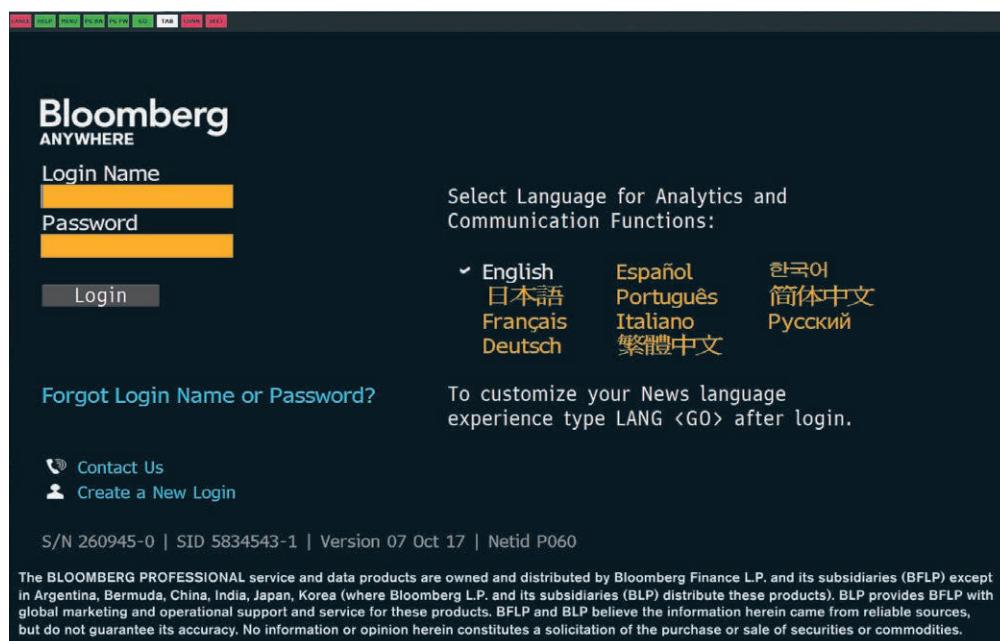
# The Bloomberg Terminal

## Logging in

Once you open the Bloomberg Terminal application, you must log in with a login name and password.

- Click on one of the Bloomberg panels.
- Press the green <Enter/GO> key on the keyboard. The login screen appears, including the yellow highlighted Login Name and Password fields as shown below.
- You will be prompted to create a login name and password when logging in for the first time.
- Press <GO>.

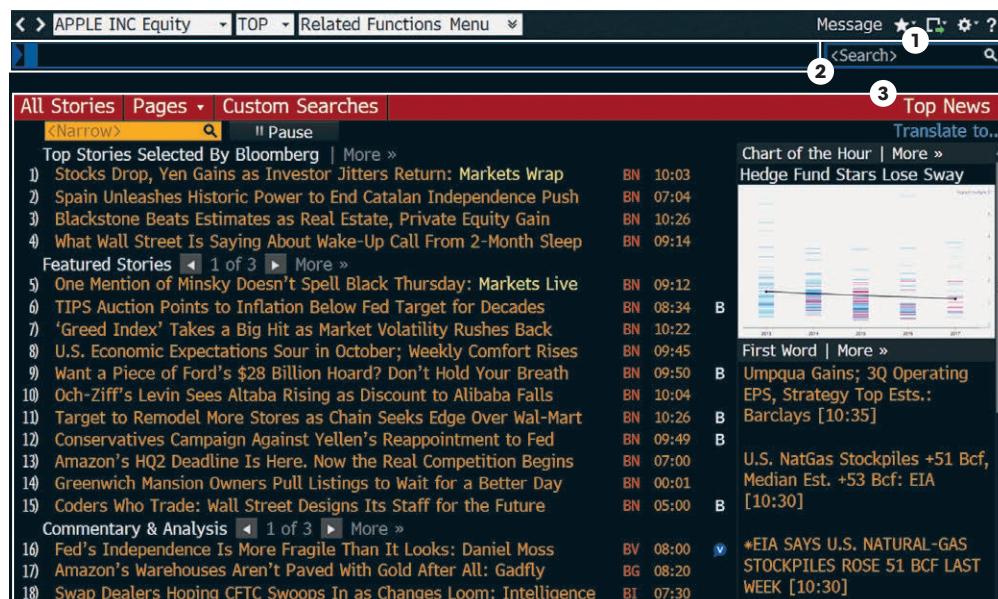
Up to four Bloomberg panels or windows appear on your computer desktop with default "wake-up" screens.



# The Bloomberg Terminal

## Bloomberg panels

When you first log in to Bloomberg, up to four Bloomberg panels appear. The panels are independent workspaces that enable you to multi-task within the Bloomberg system. You can move from one panel to another using the blue <PANEL> key on the keyboard or by clicking on the specific panel you want from the Windows taskbar.



The four Bloomberg panels enable you to work with multiple functions simultaneously. As shown above, each panel is divided into three main sections:

- 1. Toolbar** – The left side of the toolbar includes the menu tab and a drop-down list of recently loaded securities, with the current loaded security visible. The right side features icons to help you perform key tasks, including exporting data, viewing favorite places and securities, accessing Help and adjusting your defaults and display.
- 2. Command line** – Here you enter commands for functions and securities. You can also perform a keyword search for securities and functions from the command line. This Autocomplete feature makes the Bloomberg Terminal entirely discoverable from the command line.
- 3. Function area** – Here you will see the actual function content displayed.

# Functions & securities

## About functions

Functions are unique Bloomberg applications that provide analysis and information on securities, sectors, regions and more.

Each function is accessed by typing in its unique mnemonic (a short, memorable name) and then pressing the <GO> key.

**Example** – WEI is the mnemonic for the World Equity Indices analysis function. To access this function, enter WEI <GO>. The mnemonic for the function in your selected window is always displayed in the toolbar.

The screenshot shows the Bloomberg Terminal interface. At the top, there's a toolbar with various icons and a search bar labeled "<Search>". Below the toolbar, the main window title is "World Equity Indices". The window contains a table with 15 rows of data. The columns include: Rank, Region, 2Day, Value, Net Chg, %Chg, Δ AVAT, Time, %Ytd, and %YtdCur. The data rows show various indices like Americas, DOW JONES, S&P 500, NASDAQ, etc., with their respective values and percentage changes.

Rank	Region	2Day	Value	Net Chg	%Chg	Δ AVAT	Time	%Ytd	%YtdCur
1)	Americas		23076.08	-81.52	-0.35%	+43.04%	10:36	+16.77%	+16.77%
11)	DOW JONES		2552.09d	-9.17	-0.36%	+17.86%	10:21	+13.99%	+13.99%
12)	S&P 500		6575.60	-48.62	-0.73%	+16.92%	10:36	+22.15%	+22.15%
13)	NASDAQ		15787.65d	+5.49	+0.03%	+3.35%	10:16	+3.27%	+11.25%
14)	S&P/TSX Comp		49887.38d	-51.60	-0.10%	+39.05%	10:16	+9.30%	+20.46%
15)	S&P/BMV IPC								

1. Function mnemonic.

## Types of functions

There are two types of functions:

- Non-security functions provide information or analysis on an entire market sector and do not require a loaded security.

**Example** – WEI is a non-security function because it provides information for dozens of equity indices on one screen. You can run WEI without loading a security by loading WEI <GO> as shown above.

- Security-specific functions analyze a loaded security.

**Example** – GP (Graph Price) is a security-specific function because you must specify a security before graphing its price. You must load a security to run the GP function: IBM US <EQUITY> GP <GO>.

## Using functions

There are two main ways to run functions, depending on whether or not you know the function mnemonic.

If you know the function mnemonic:

- Enter the function mnemonic in the command line.
- Press the <GO> key.
- The function runs on the active Bloomberg panel.

**Example** – In the command line, enter WEI <GO>.

If you don't know the function mnemonic:

- Type a keyword for the information you want in the command line. (As you type, Autocomplete provides a list of suggested functions.)
- Select the function you want to run from the list.
- The function runs on the active Bloomberg panel.

**Example** – You want to find a function that analyzes inflation.

# Functions & securities

## Working with securities

< > APPLE INC Equity ▾ WEI ▾ Related Functions Menu ▾ Message ⚡ 🔍 ?

**INFLA** 1

**FUNCTIONS**

- EFCF
- WBI
- Launchpad »

**ECMX** 2

- DOTS
- YA

*More Functions...*

**SECURITIES**

- CPI YOY Index
- CPI XYOY Index
- ECCPEMUY Index
- CPURNSA Index
- CNCPIYOY Index
- TII Govt

*More Securities...*

**SEARCH**

- SEARCH INFLATION SWAP
- SEARCH INFLATION UK

*Search for 'INFLA'...*

<UP ARROW> to hide Autocomplete Feedback

Economic Forecasts *Inflation DATA Anticipated*

World **Inflation Bonds**

World **Inflation Bonds**

Global Economic Matrix *Global Inflation* 3

FOMC Dot Plot *U.S. Inflation* 3

Yield and Spread Analysis *Inflation Ratio*

US CPI Urban Consumers YoY NSA *Inflation*

US CPI Urban Consumers Less Food & Energy YoY NSA *Inflation*

Euro Area MUICP All Items YoY NSA *Inflation*

US CPI Urban Consumers NSA *Inflation*

China CPI YoY *Inflation*

United States Treasury **Inflation Indexed Bonds (Multiple Matches)**

Indices

USD

YtdCur

16.77%

13.96%

22.14%

11.25%

20.43%

29.01%

23.05%

12.46%

24.05%

27.16%

22.69%

29.14%

21.28%

17.43%

31 NIKKEI 21448.52d +85.47 +0.40% +2.74% 02:15 C +12.21% +16.68%

32 HANG SENG 28159.09d -552.67 -1.92% +27.08% 04:08 C +27.99% +27.25%

1. Keyword in Command line.
  2. Function mnemonic.
  3. Function title.

**Note** – If you are running a security-specific function, the security you want to analyze must be loaded before you run the function (covered in the next section).

## About securities

Securities are financial instruments — like stocks and bonds — that you can analyze with Bloomberg functions. Once you have loaded a security on a panel, it appears in the loaded security field on the panel's toolbar. You can run a series of functions to analyze the loaded security.

The security appears as the loaded security in the active panel's toolbar.

**Example –** Using Ford Motor Company, enter F <EQUITY> <GO>.

If you know one of the widely used identification numbers for a security (e.g., CUSIP, ISIN, BBGID):

- Enter the security identification number in the command line.
  - Press the yellow market sector key corresponding to the security type (Corp, Muni, Equity, etc.).
  - Press the <GO> key.

The security appears as the loaded security in the active panel's toolbar and a categorized menu of security-specific analysis functions appears.

**Example –** Using the CUSIP for Wal-Mart Stores Inc., enter 931142DD2 <CORP> <GO>.

**Note** – The loaded security remains the active security on the panel until you load a different security.

**Note** – The loaded security remains the active security on the panel until you load a different security.

## **Loading securities**

There are three main ways to load a security — depending on whether or not you know the security's ticker symbol or identifier.

If you know the ticker symbol for the security you want to load:

- Enter the ticker symbol in the command line.
  - Press the yellow market sector key corresponding to the security type (Corp, Muni, Equity, etc.).
  - Press the <GO> key.

# Functions & securities

If you don't know the ticker or any other identification number for the security you want to load, follow the steps below:

- In the command line, start typing a keyword for the financial instrument you want to analyze.

As you type, Autocomplete provides a list of suggested securities.

- Select the security you want to load from the list.

The security appears as the loaded security in the active panel's toolbar and a categorized menu of security-specific analysis functions appears.

**Hint** – The more information you enter, the more refined the list becomes. If you know the type of security you are looking for, press the matching yellow market sector key to update the results.

The screenshot shows the Bloomberg Terminal interface. The top bar displays 'APPLE INC Equity' and 'WEI'. The main area has a search bar with 'AT&T' typed in. A dropdown menu titled 'Autocomplete Feedback' lists several suggestions: 'AT US Equity' (AT&T Inc (U.S.)), 'T UN Equity' (AT&T Inc (New York)), 'CMCSA US Equity' (Comcast Corp Class A (U.S.) AT&T COMCAST Corp.), 'SBC US Equity' (AT&T Inc (U.S.)), 'SOBA GY Equity' (AT&T Inc (Xetra)), '653707Q US Equity' (AT&T Corp (U.S.)), 'TUSD SW Equity' (AT&T Inc (Switzerland)), 'SOBA GR Equity' (AT&T Inc (Germany)), and 'T UT Equity' (AT&T Inc (NASDAQ InterMarket)). Below this is a section for 'More Securities...' which lists various global equity indices and markets. The table below shows the latest price, change, percentage change, time, and other metrics for these securities.

21) Euro Stoxx 50		3597.15d	-22.50	-0.62%	-0.47%	10:22	+9.32%	+23.07%	
22) FTSE 100		7516.42d	-26.45	-0.35%	+8.03%	10:22	+5.23%	+12.46%	
23) CAC 40		5358.66d	-25.15	-0.47%	+33.68%	10:22	+10.21%	+24.07%	
24) DAX		12971.77d	-71.26	-0.55%	+14.58%	10:22	+12.98%	+27.19%	
25) IBEX 35		10191.30d	-82.10	-0.80%	-27.10%	10:22	+8.97%	+22.68%	
26) FTSE MIB		22062.77d	-291.92	-1.31%	+4.17%	10:22	+14.70%	+29.13%	
27) OMX STKH30		1644.10	-0.63	-0.04%	+25.36%	10:37	+8.36%	+21.28%	
28) SWISS MKT		9230.78d	-78.83	-0.85%	+29.85%	10:22	+12.30%	+17.45%	
3) Asia/Pacific									
31) NIKKEI		21448.52d	+85.47	+0.40%	+2.74%	02:15 c	+12.21%	+16.68%	
32) HANG SENG		28159.09d	-552.67	-1.92%	+27.08%	04:08 c	+27.99%	+27.25%	
33) CSI 300		3931.25d	-12.91	-0.33%	+3.59%	03:01 c	+18.77%	+24.66%	
34) S&P/ASX 200		5896.13	+5.65	+0.10%	+30.00%	02:19 c	+4.07%	+13.76%	

1. Keyword.
2. Market sector (yellow key).
3. Security appears in Autocomplete.

# Navigation

## Basic search (autocomplete)

Bloomberg's intelligent Autocomplete search makes it easy to find the security or function you want.

- Type a term in the command line at the top of the active panel.

As you type, Autocomplete displays a list of suggested functions and securities.

- From the list, pick a function to run or a security to load.

The panel updates with the security or function you have selected.

The screenshot shows the Bloomberg Terminal interface with the search bar containing 'INFLA'. An autocomplete dropdown menu is open, listing various suggestions:

- 1. Autocomplete suggested listings.
- 2. Click to select a suggested function.

Suggestion	Value
Economic Forecasts <i>Inflation DATA Anticipated</i>	
World Inflation Bonds	
World Inflation Bonds	
Global Economic Matrix <i>Global Inflation</i>	16.77%
FOMC Dot Plot <i>U.S. Inflation</i>	13.96%
Yield and Spread Analysis <i>Inflation Ratio</i>	22.14%
US CPI Urban Consumers YoY NSA <i>Inflation</i>	11.25%
US CPI Urban Consumers Less Food & Energy YoY NSA <i>Inflation</i>	20.43%
Euro Area MUICP All Items YoY NSA <i>Inflation</i>	29.01%
US CPI Urban Consumers NSA <i>Inflation</i>	23.05%
China CPI YoY <i>Inflation</i>	12.46%
United States Treasury Inflation Indexed Bonds (Multiple Matches)	24.05%
United States Treasury Inflation Indexed Bonds (Multiple Matches)	27.16%
United States Treasury Inflation Indexed Bonds (Multiple Matches)	22.69%
United States Treasury Inflation Indexed Bonds (Multiple Matches)	29.14%
US CPI Urban Consumers NSA <i>Inflation</i>	21.28%
The United Kingdom : <i>Inflation Rate</i>	21.28%
Search for 'INFLA'...	17.43%

Below the dropdown, the terminal displays two stock tickers:

Ticker	Name	Price	Change	Percent Change	Last Update	Open	Close	Volume
30 NIKKEI		21448.52	+85.47	+0.40%	02:15 C	+12.21%	+16.68%	
30 HANG SENG		28159.09	-552.67	-1.92%	04:08 C	+27.99%	+27.25%	

1. Autocomplete suggested listings.
2. Click to select a suggested function.

# Navigation

## Full search

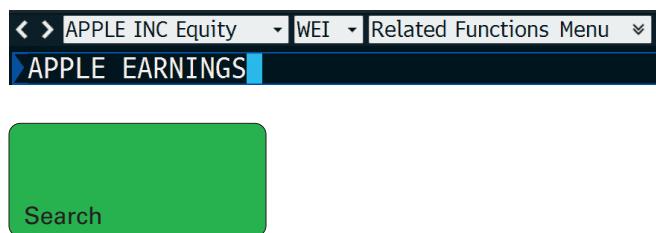
If you can't find what you're looking for with a basic search (Autocomplete), you can use the comprehensive Help Search (HL) function. HL allows you to search by keyword across all categories of information, including functions, securities, companies and people.

HL groups results by category and relevance.

- Enter a search term in the command line at the top of the active panel.
- Press the <SEARCH> key on the keyboard. HL appears with a categorized list of matches.
- Select the appropriate match from the featured search results section of the screen.

or

Select a category from the left sidebar to display full category results.



## HL search results

Headline	Source	Ticker	Date
Apple Inc: Earnings Call 2017/08/01	Earnings...	AAPL US Equity	08/01/17
Apple Inc: Earnings Call 2017/05/02	Earnings...	AAPL US Equity	05/02/17
Apple Inc: Earnings Call 2017/01/31	Earnings...	AAPL US Equity	01/31/17
Apple Inc: Earnings Call 2016/10/25	Earnings...	AAPL US Equity	10/25/16

# Navigation

## Browsing menus

### About menus

All Bloomberg functions are organized by menus that are classified by market sector or product type. Each menu is part of a hierarchy, going from the individual functions up to the Bloomberg Home menu. You can browse menus to discover more about the analysis and information the Bloomberg Terminal offers.

Here are some sample paths illustrating the navigation through the menu hierarchy to individual functions:

- Main Menu > Equities > Analyze FORD MOTOR CO Equity > Company Analysis > Financial Analysis > FA
- Main Menu > News & Research > TOP



1. Related functions menu.

### Accessing menus

There are three ways to access menus:

- Menu button
- Menu key
- Yellow key

### Menu button & menu key

From any function, click the Menu button on the toolbar or press the <MENU> key to access a menu of related functions. Once you access the menu, click or press the <MENU> key again to move up to the next menu in the hierarchy.

### Yellow key

To access the menu of functions related to a market sector, press the market sector's yellow key, then <GO>.

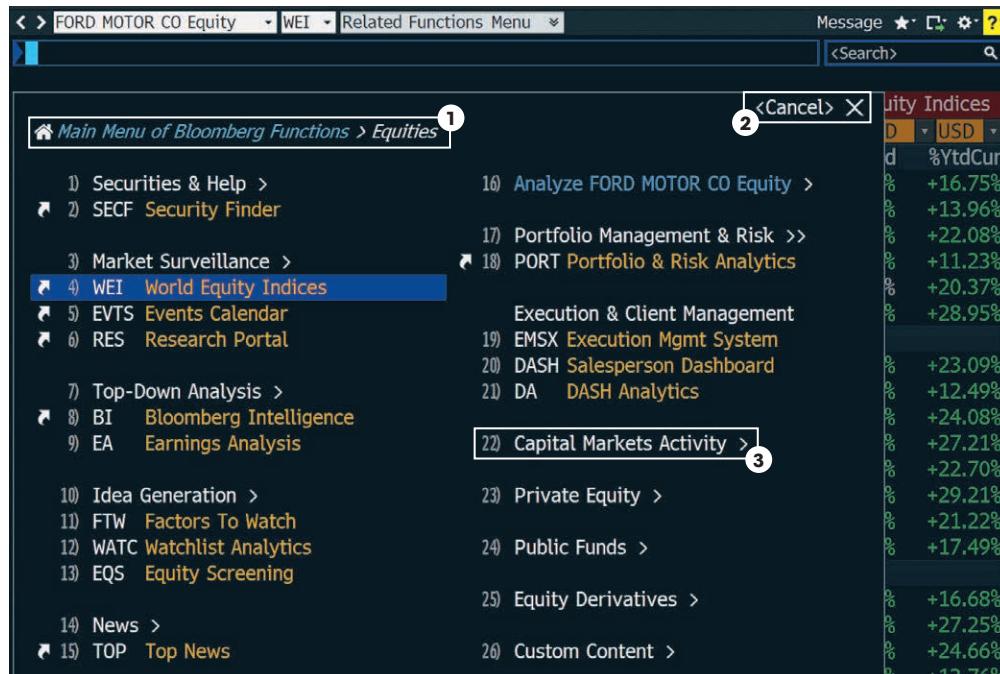
**Example** – To browse the Equities menu, press <EQUITY> <GO>.

### Loading a security

To access the menu for a specific security, simply load the security's ticker or other identifier.

**Example** – To access the menu of functions that can be used to analyze IBM US, enter IBM US <EQUITY> <GO>.

# Navigation



1. Menu breadcrumbs

2. Cancel

3. Category heading/  
navigation

## Menu layout

Bloomberg menus are intuitively organized to speed your search efforts.

## Menu breadcrumbs

These show your path in the overall menu hierarchy and enable you to navigate backward and forward.

## <CANCEL> X

Click <Cancel> X located in the upper right-hand corner to close the menu.

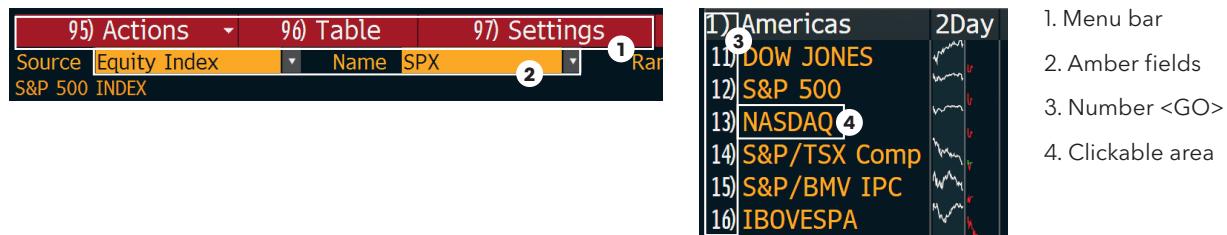
## Categories & functions

Menus organize functions under categories. For category headings followed by ">", click the category to see the next menu in the hierarchy.

# Performing analysis

## Navigating functions

Bloomberg functions use common screen elements that work in similar ways. Once you learn about these elements, you can use any function.



### Menu bar

The red bar at the top of each function includes the function's title at the right and provides drop-down menus and buttons to help you perform key tasks. It may also contain a page number indicator.

### Amber-colored fields

Amber fields indicate areas on the screen that you can change. Amber-colored fields represent editable-form elements, text and data input areas and drop-down lists.

### Clickable areas

Moving your cursor over a clickable area of the screen shows one of three types of indicators:

- **White outline box** – Indicates most clickable items, including entries in lists, menus and tables.
- **Numbered information** – Numbers indicate a topical link, enabling quick access to a related page by either clicking the line or entering the number and clicking <GO>.
- **Highlighting** – Indicates clickable buttons and tabs.

### Keyboard navigation

Typing in the number next to an option allows you to quickly navigate within the function using only your keyboard. Many clickable onscreen options are labeled with a Number <GO>.

# Performing analysis

## Stock/Company screening

The Equity Screening (EQS) function enables you to perform sophisticated searches for equity securities. The following is a quick-start overview for using EQS.

### Step 1

- Enter EQS <GO>.

The Equity Screening screen appears.



### Step 2

Use the Screening Criteria section to define preliminary search criteria.

- Click a category. A window appears with options for the selected category.
- Drag and drop the appropriate criterion from the window so that it appears in the Included Options or Excluded Options section of the window.
- Click the Update button.

The criterion for the category is saved and the window closes. The Selected Screening Criteria section at the bottom of the tab updates with your selected criterion and count of company matches.

### Step 3

Use the Add Criteria section to refine the search with more data-driven criteria, e.g., industry classifications, fundamentals and ratios.

- Click the Fields button.

The Browse Fields window appears with a list of all of the available search criteria fields.

- Use the category tree or Search field at the left of the window to identify the specific criteria fields for which you want to set conditions, then click the Select button. The Add Criteria section of the Build/Edit Screen tab updates with the name of the selected criterion field and additional fields that allow you to set a condition(s) for the selected criterion.

- Enter the appropriate condition(s), then press <GO>. The Selected Screening Criteria section of the screen updates with your selected criterion.

### Step 4

Once you have selected all the criteria for the search, click the Results button.

The list of companies (equities) matching your search criteria appears.

**Optional** – To explore further options such as saving the search or exporting the results to Excel, click the red Output and Actions toolbar buttons on the Results Page.

**Note** – To access a complete guide to using EQS, press the green <HELP> key once from within the EQS function.

# Performing analysis

## Analyzing a company

In Functions & securities and Navigation, we described the overall logic and navigation of the Bloomberg Terminal. With that information, the complete breadth and depth of information on Bloomberg are intuitively and completely discoverable.

This section highlights some of the key company analysis functions available on Bloomberg.

**F US Equity** | **Report**

1) Profile | 2) Issue Info | 3) Ratios | 4) Revenue & EPS | 5) Industry Info

**Security Description: Equity**

**FORD MOTOR CO**  
**FIGI** BBG000BQPC32  
**Classification** Automobiles

**BI Research Primer | BICO »**  
**Ford Motor Company designs, manufactures, and services cars and trucks. The Company also provides vehicle-related financing, leasing, and insurance through its subsidiary. ... More**

**8) Price Chart | GP »**  
  
**Px/Chg 1D (USD)** 12.08/-0.9%  
**52 Wk H (01/04/17)** 13.2167  
**52 Wk L (08/18/17)** 10.47  
**YTD Change/%** -0.001/-0.01%  
**Mkt Cap (USD)** 47,978.8M  
**Shrs Out/Float** 3,900.9M/3,873.8M  
**SI/% of Float** 108.2M/2.79%  
**Days to Cover** 3.6

**9) Estimates | EE »**  
**Date** 07:00 | **(C)** 10/26/17  
**P/E** 8.19  
**Est P/E** 12/17 6.97  
**T12M EPS (USD)** 1.48  
**Est EPS** 1.73  
**Est PEG** N.A.

**10) Corporate Info**  
**14) www.ford.com**  
**Dearborn, MI, United States**  
**Empls** 203,000 (06/30/17)  
**15) Management | MGMT »**  
**16) William Clay Ford Jr "Bill"**  
Chairman  
**17) James P Hackett "Jim"**  
President/CEO  
**18) Robert L Shanks "Bob"**  
Exec VP/CFO  
**12M Tot Ret** 6.24%  
**Beta vs SPX** 1.38  
**21) Depositary Receipts**  
**Active Receipts** 1

**Note** – Once you load a security, you can run any number of functions to analyze that security without having to reenter the security.

### Step 1

Load the company you want to analyze.

**Example** – Enter F US <EQUITY> <GO>.

The company appears in the panel's toolbar as the loaded security.



### Step 2

Run the analysis function on the loaded security in one of the following ways:

- Click on a category or function from the menu window — or type the mnemonic in the command field — to explore the full range of analysis options.
- Enter the mnemonic for the specific function you want to run, then press <GO>.

The analysis function runs on the loaded security.

**Example** – Enter DES <GO>.

# Performing analysis

## Mnemonics for popular company analysis functions

<b>DES</b>	Company description and overview
<b>CN</b>	Company news
<b>HP</b>	Historical price table
<b>GP</b>	Historical price chart
<b>GIP</b>	Intraday price chart
<b>DVD</b>	Dividend information
<b>ERN</b>	Earnings summary
<b>FA</b>	Fundamentals and financial statements
<b>RG</b>	Total return comparison
<b>RELS</b>	Capital structure (including bonds and CDS spreads)
<b>G</b>	Technical analysis and/or Multi-security charts

**Note** – To access a function's Help Page (a comprehensive user guide), press the <HELP> key once.

For cheatsheets that provide lists of popular analysis functions for specific security types, enter BU <GO>, then click the Access Training Documents link.

## Analyzing an index, bond or currency

The Functions & securities and Navigation sections of this guide describe the overall logic and navigation of the Bloomberg Terminal. With them, the total breadth and depth of information on Bloomberg are completely discoverable. This section highlights the process behind loading different types of securities and indices and running analysis functions.

Load the security or index you want to analyze using the Autocomplete feature or by entering a ticker and pressing the yellow key.

### Examples

<b>SPX &lt;INDEX&gt; &lt;GO&gt;</b>	S&P 500 index
<b>USURTOT &lt;INDEX&gt; &lt;GO&gt;</b>	Index tracking the U.S. unemployment rate
<b>EUR &lt;CURNCY&gt; &lt;GO&gt;</b>	Euro spot
<b>F 12 07/16/31 &lt;CORP&gt; &lt;GO&gt;</b>	Ford Motor Credit bond, 7.45% coupon, matures July 16, 2031
<b>CL1 &lt;CMDTY&gt; &lt;GO&gt;</b>	Front-month NYMEX-traded sweet crude oil futures contract

Run the analysis function on the loaded security in one of the following ways:

- Click on a category or function from the menu to explore the full range of analysis options.
- Enter the mnemonic for the function you want to run, then press <GO>.

For cheatsheets that provide lists of popular analysis functions for specific security types, enter BPS <GO>, then click through to your chosen subject.

**Note** – In some cases, a function that works for one type of security does not work for a different type of security. For example, the Yield Analysis (YA) function allows you to value a bond. If you load an index and try to run the YA function, an error message appears because the analysis and security type are incompatible.

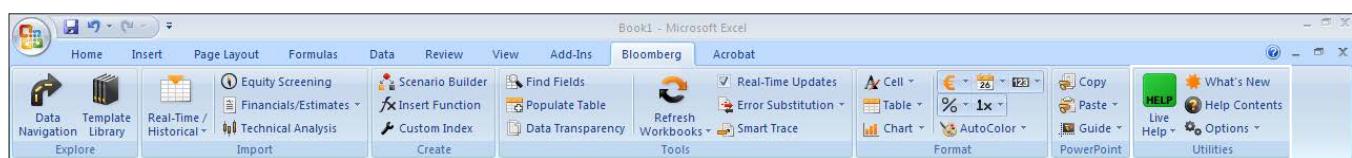
# Exporting data

## The Bloomberg Excel Add-in

### Introduction

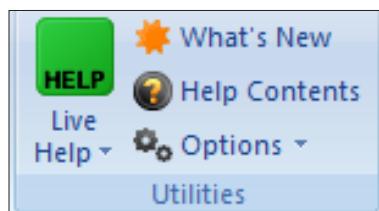
The Bloomberg Excel Add-in is a powerful tool that delivers Bloomberg data into a Microsoft® Excel spreadsheet for custom analysis and calculations. All data must remain on a licensed Bloomberg workstation.

On a computer where the Bloomberg software is active, you can access the Bloomberg Excel Add-in from the Excel taskbar.



The following is a quick overview of the Bloomberg Excel Add-in. For further details on and resources related to the Bloomberg Excel Add-in:

- On the Terminal, enter API <GO>.
- On Excel's Bloomberg tab, in the Utilities group at the far right, select Help Contents.



### Installation of the Add-in

If you do not see the Bloomberg tab in Excel, you can try to install the Add-in by completing the following steps.

#### Step 1

From the computer's task bar select Start > All Programs > Bloomberg > Install Excel Add-in.

An Installing Bloomberg Excel Add-in dialog box appears.

#### Step 2

Click Install. A confirmation dialog box appears.

#### Step 3

Close the dialog boxes.

#### Step 4

Close Excel.

#### Step 5

Open Excel. A Bloomberg tab appears on Excel's taskbar.

**Note –** If you are unable to install the Add-in, consult your Information Technology team regarding administration rights to the computer.

# Exporting data

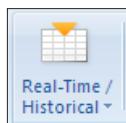
## Bloomberg Data Wizard

The easiest way to download data to Excel via the Bloomberg Excel Add-in is to use one of the Bloomberg Data Wizard tools. The wizards provide a guided process to draw data from Bloomberg into a spreadsheet.

### Step 1

On the Bloomberg tab of the Excel spreadsheet, in the Import group, choose from the following options:

- To download most forms of data, click the Real-Time/Historical icon.



The Bloomberg Data Wizard window appears with four data type options.

- To download values from financial statements and/or earnings data, click the Financials/Estimates icon.



The Bloomberg Fundamental Analysis Wizard window appears with two data type options.

### Step 2

Move your mouse over each of the data type icons to display a blurb describing the type of data that is available with each Wizard option.

### Step 3

Click on the icon representing the type of data you want to download.

Step 1 of the Wizard appears.

### Step 4

Follow the instructions that appear in the Wizard window to build your data set.

Once you have completed all of the steps in the Wizard, the spreadsheet updates with the data you requested.

## Bloomberg formulas in Excel

The Bloomberg Wizards are the easiest way to download data to Excel. The wizards write the Bloomberg API formulas for you. You can, however, write the formulas yourself if you need more flexibility than the wizards provide.

When using any of the formulas, you must specify the security for which you want to retrieve data (Security) and you must specify the data item you want to retrieve (Field). The Security must be represented as (Ticker) (Market Sector), for example, IBM US Equity.

The Field must be represented by its field mnemonic. For example, to retrieve the last price for a security, the field mnemonic is PX\_LAST. The Field Search tool in Excel enables you to search for field mnemonics by category or keyword. Access the Field Search tool by clicking the Find Fields icon on the Bloomberg tab.



## Additional resources for the Bloomberg Excel Add-in

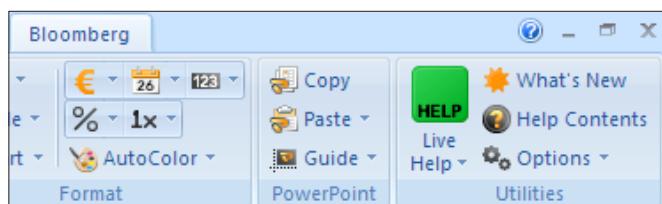
On the Bloomberg Terminal:

**XLTP <GO>** Library of preformatted Excel spreadsheet templates

**HELP DAPI <GO>** Further detailed information on how to use Excel API

Within Excel:

On the Bloomberg tab, within the Utilities group, click on the Help Contents icon to get information and instructions on using the Excel Add-in to retrieve data.



# Exporting data

## Drag & drop

Some functions display a drag and drop icon in the top right corner of the screen. You can click on and drag this icon to move securities from the current screen into another application such as a Microsoft® Excel spreadsheet or a Bloomberg Wizard as part of the Bloomberg Excel Add-in. Once in a wizard or in a spreadsheet, the tickers appear with Bloomberg market identifiers.



The screenshot shows the Bloomberg Terminal interface with the 'World Equity Indices' function open. The top menu bar includes 'FORD MOTOR CO Equity', 'WEI', 'Related Functions Menu', 'Message', and a toolbar with icons for star, export, settings, and help. The main area displays a table of indices with columns for Standard, Movers, Volatility, Ratios, Futures, %Chg YTD, and USD. The table lists three indices: Americas, DOW JONES, and S&P 500, with their respective values, net changes, percentage changes, and time data. A drag and drop icon is located in the top right corner of the panel.

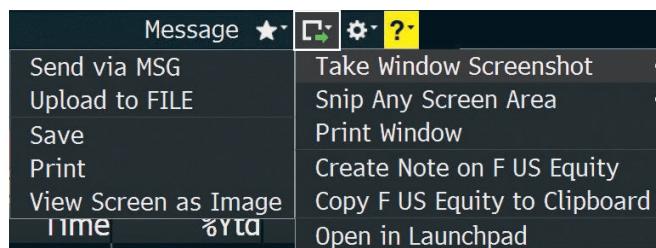
1. Drag & drop icon

**Note** – When you use drag and drop, only the securities and/or data from the function's current page move. If you have more than one page of securities, you must repeat the drag and drop for each page.

## Printing & other export options

There are various ways you can save or export screen shots from Bloomberg.

To display a list of export options, click on the Export icon at the top right of a panel's toolbar.



# Bloomberg Market Concepts (BMC)

The best next step to get acquainted with the Bloomberg Terminal is to complete the certification course: Bloomberg Market Concepts (BMC). BMC is an 8-hour, self-paced e-learning course that provides a visual introduction to the financial markets and covers more than 70 Terminal functions. BMC consists of four modules — Economics, Currencies, Fixed Income and Equities — woven together from Bloomberg data, news, analytics and television. By taking BMC, learners familiarize themselves with the industry-standard service through four heavily interconnected modules.

The screenshot shows the Bloomberg Terminal interface with the following details:

- Top navigation bar: APPLE INC Equity, BMC, Related Functions Menu.
- Right side: Message, ★, □, ?, <Search>, magnifying glass icon.
- Central area title: Bloomberg Market Concepts (Third Edition).
- Left sidebar menu (selected item is 2) Overview):
  - 2) BMC
  - 2) Overview
  - 3) Course Modules
  - 4) Learning Outcomes
  - 5) FAQ
  - 6) CFA Credit
  - 7) Sign Up
  - 8) Login
- Main content:
  - Bloomberg Market Concepts (BMC) is an 8 hour self-paced e-learning course that provides an introduction to the financial markets. BMC consists of 4 modules – Economic Indicators, Currencies, Fixed Income and Equities – woven together from Bloomberg data, news and analytics. BMC is no additional charge on the Terminal. It is available on the web for a fee at [www.bloombergforeducation.com](http://www.bloombergforeducation.com).
  - By taking BMC, you will:
    - >> Learn about the financial markets via 23 learning outcomes.
    - >> Familiarize yourself with over 70 Bloomberg terminal functions.
    - >> Solidify your knowledge with over 100 interactive questions.
- Certificate of Completion: A thumbnail image of a certificate titled "Certificate of completion" dated August 2011.
- CFA Continuing Education (CE) Credit: BMC qualifies for 8 hours of CE credit. Click [here](#) for more information.
- CE Qualified Activity: CFA Institute logo.

By taking BMC, you will:

## Learn the language of finance

- Supplement your university learnings with practical knowledge of the markets.
- Familiarize yourself with more than 70 Bloomberg Terminal functions.

## Get Bloomberg on your resume

- Receive a certificate of completion after completing BMC.
- Demonstrate your comfort with the gold standard data platform.

Type BMC into the command line to access the full course.

## Discover the inner workings of the markets

- Learn what moves markets.
- Familiarize yourself with key benchmarks that professionals monitor.

# Getting help & learning more

There are a variety of ways to get help using the Bloomberg Terminal.

## Bloomberg Help

Enter HELP <GO> for an online user guide to the overall logic and navigation of the Bloomberg Terminal.

## Bloomberg Resource Center

Enter BPS <GO> for the Bloomberg Terminal Resource Center homepage with links to training resources, including training documents and video tutorials.

## Help pages

Each function has a comprehensive, searchable online user guide designed to answer common questions and describe key functionality. From within any function, press <HELP> once to access that function's Help Page.

## Bloomberg Help Desk

To ask any Bloomberg-related questions, students can start an email communication with the Bloomberg Help Desk. Press <HELP> twice to connect.

## Additional support

For additional Bloomberg support, press the red <ESC/CANCEL> key. From the <CANCEL> screen you'll find links to:

- Contact the Help Desk
- Contact the Tech Support Team
- Contact Us  
(a list of all local Global Customer Support numbers)
- Your Account Manager and Product Representative  
(simply click on the rep's name)

The screenshot shows the 'HELP Help Page for WEI' window. The left sidebar contains a search bar and links such as 'Control Area', 'Indices by Region', 'Modifying Data Columns', and 'Analyzing AAVT Data'. The main content area displays a table titled 'What Is World Equity Indices (WEI)?' with columns for 'Symbol', 'Last Day', 'Value', 'Net Chg', '%Chg', 'A/BAT', 'Time', 'Ytd', and 'Ytd/Year'. The table lists various indices like Dow Jones, S&P 500, Nasdaq, Nikkei, and others.

The screenshot shows the 'BHRQ Live Help' window. It features a green 'Helpx2' button, a text input field with placeholder text 'Welcome! Please enter your question below. For the most efficient service, please include details.\*', and a 'Submit' button at the bottom right.

The screenshot shows a promotional banner for 'BTRS - Total Return Swaps on the Bloomberg Barclays Indices'. The banner includes a 'LEARN MORE' button and links for 'Your Sales Representative and Account Manager is:' and 'CONTACT US For general inquiries'. At the bottom, there are links for 'HELP DESK', 'REQUEST TRAINING', and 'CONTACT US'.

# Functions

To see a more comprehensive list of more than 150 targeted functions for students, visit USER <GO>.

## Training & navigation

- BMC** Get Bloomberg certified and learn more about the financial markets.
- BHL** Visit the Bloomberg Help and Learning Center.
- BPS** Locate topic-specific cheatsheets and videos.
- BU** Search for, enroll in and launch a wide variety of webinars and training resources.

## Charting & graphs

- GP** Chart securities and technical studies on the Bloomberg Terminal.
- HS** Visualize and compare the performance of two securities.
- GC** Chart yield curves and see how interest rates move over time.
- GF** Visual analysis of a company's fundamentals.
- ECWB** Allows you to standardize and manipulate economic data.

## Commodities

- BGAS** See pricing for the North American natural gas spot market.
- BOIL** Get a full picture of global oil & refined products spot pricing.
- CPF** Analyze expert forecasts for future commodity prices.
- FDM** Access comprehensive fundamental commodities data.
- GLCO** Monitor the price movement and performance of global commodities.
- NGAS** Analyze natural gas statistics for the U.S., Canada and Mexico.
- WETR** Analyze current, historical and forecasted weather trends.

## Company analysis

- DES** Access consolidated financial data and fundamental background information.
- BI** Access industry analyses from Bloomberg Intelligence.
- BIP** Search for primers on companies, industries or topics.
- BICO** See a company primer to quickly educate yourself on a company.
- QUIC** Leverage QuickTakes to put important news events in context.
- ANR** See analyst recommendations and price targets for an equity.

## Currencies

- FXFC** Analyze currency price forecasts by contributors.
- FXCA** Conversion calculation.
- FXC** Matrix of currency rates.
- WCRS** Visually rank and compare current and historical currency rates.
- WIRA** Track international reserve assets and related growth rates.
- GMM** Monitor the most significant moves in the global financial markets.

## Derivatives

- OMON** See real-time pricing and market data for call and put options.
- OVME** Price and back-test equity derivative products and strategies.
- OVML** Structure and price multi-leg FX options for various strategies.

# Functions

## Economics

- FED** Monitor the activities of the U.S. Federal Reserve bank.
- CENB** Access portals to other international central bank resources.
- ECO** See economic calendars for upcoming industry and central bank releases.
- ECST** Monitor economic data from multiple sources.
- ECFC** See economic forecasts and compare regional forecasts.

## Equities

- EQS** Screen for companies to validate your trade ideas.
- FA** Find a company's financial statements and fundamental data.
- IPO** Monitor equity offerings to discern competitor financing strategy.
- CAST** See a debtor's organization and capital structure.
- CACS** See a calendar of corporate actions and events for a security.
- WEI** Get comprehensive market surveillance for global equities markets.
- RV** Compare a stock to its peers across various metrics.
- EQRV** Evaluate whether a company is fairly valued relative to peers.
- CM** Monitor the key events influencing a company's stock price.

## Excel tools

- XLTP** Access a library of Excel templates for custom data analysis.
- DAPI** Learn about retrieving data into Excel using Bloomberg API formulas.
- FLDS** Locate specific Excel fields for your formulas.

## Fixed income

- SRCH** Search fixed income securities for trends and trade ideas.
- DDIS** See the maturity distribution of debt for a selected issuer.
- YAS** Price fixed income securities and calculate yields in one place.
- BTMM** Assess a country's current interest rate environment.
- ALLQ** See dealer-contributed prices in real time for corporate bonds.
- DEBT** Determine the holders who are most exposed to a country's debt.
- WB** Monitor sovereign bond yields, spreads and performance.
- CRPR** Assess the creditworthiness of an issuer or fixed income security.
- CRVF** Search for curves that are relevant to your fixed income market analysis.
- SRSK** Get transparent, quantitative estimates of the 1-year default probability of a country's sovereign debt and 5-year CDS spread.

## Mergers & acquisitions

- BUYP** View M&A buyer profiles to peg possible acquirers for your assets.
- MA** Track and analyze M&A and arbitrage spread data in real time.
- MARB** Monitor real-time merger and acquisition arbitrage spread data.
- MRGC** Evaluate hypothetical merger scenarios.
- PE** Access functions for PE fundraising, screening and market monitoring.

# Functions

## News

- TOP** Get the day's top worldwide news stories in one place.
- TWTR** Search for Twitter news on Bloomberg.
- CN** See top news on a specific company.
- FIRS** Read summarized news stories to track market-moving news.
- SALT** Set up email alerts for news on the companies you follow.
- BRIE** Read Bloomberg newsletters on markets, economics and industries.

## Portfolio management

- PRTU** Create, manage, and share your portfolios for analysis in PORT.
- PORT** Analyze portfolio performance, scenario analysis and exposure.
- EQBT** Back-test fundamental investment strategies.
- UNCL** Create custom classifications to aggregate your portfolio or benchmark.
- BBU** Upload your portfolios, benchmarks, and custom data for analysis in PORT.
- CDE** Create custom fields to use your unique data across the Bloomberg Terminal.

## Additional resources

- MSG** Send and manage email communications through your Bloomberg.net email account.
- MRUL** Manage message rules, including forwarding emails to your Bloomberg.net email to your personal email account (Gmail, Yahoo, etc.).
- JOBS** Search for jobs at companies in the finance industry.
- PEOP** Proprietary people database where you can filter for alumni.
- MVP** Most-viewed people on Bloomberg over the last day, week or month.
- RICH** View the world's highest-net-worth individuals.

# About the Bloomberg Terminal.

Since 1981, business and financial professionals have depended on the Bloomberg Terminal® for the real-time data, news and analytics they need to make the decisions that matter. The Terminal provides information on every asset class — from fixed income to equities, foreign exchange to commodities, derivatives to mortgages — all seamlessly integrated with on-demand multimedia content, extensive electronic-trading capabilities and a superior communications network.

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**Take the next step.**

For additional information,  
press the <HELP> key twice  
on the Bloomberg Terminal®.

[bloomberg.com/professional](http://bloomberg.com/professional)

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## GETTING STARTED

This cheat-sheet provides basic instructions on how to successfully navigate and use the BLOOMBERG PROFESSIONAL® service.

We recommend the essential function codes listed below. Simply type any of these commands, followed by the <Enter> /  key to activate the function.

### Navigation from the Bloomberg Keyboard

If you are using your own keyboard and Bloomberg provided keyboard stickers: Press the <Alt> and K buttons simultaneously to display a keyboard image.



Press once to log on  
Press once to log off using your name/pword



Enter any word/phrase & press <HELP>  
to search our entire database for matches.  
E.g. A person, company, currency,



Press <Menu> once to return to previous screen  
(equivalent to a 'back' key)



Press <Page Fwd/Back> to scroll through a multiple page screen.



Press <Panel> to rotate among the Bloomberg windows



Press <Print> to print 1 page  
5 <Print> for 5 page screen. 10 <print> etc

### News

N	Main NEWS menu
TOP	Today's TOP headlines
TOP DEAL	Today's top M&A headlines *
	* over 40 different TOP categories to choose from!
READ	Most Popular News
NI	News Category Search
TNI	Dual News Category Search
Suggestions	
NI READ	Weekly summary, most read stories
NI US	U.S News
NI HOT	Global Hot News
NI WNEWS	Who's who people news
AV	Audio Visual / Multimedia Menu
LIVE	LIVE Broadcasts & Interviews
NRC	Search for other News wires by name or language

### Main Menus

In addition to the yellow market sector keys that appear on your keyboard – these function codes will lead you to the main menus of other important market sectors

NRG	Bloomberg Energy Service
IRSM	Interest Rate Swap Menu
HYM	High Yield
CBMU	Convertible Bonds
MA	Mergers & Acquisitions
FUND	Funds & Holdings
LOAN	Syndicated Bank Loan Menu
EMKT	Emerging Markets
ET	Electronic Trading
LTP OMS	Order Management Systems
DATA	Data Services
BLAW	Bloomberg Law
BINS	Bloomberg Insurance

### Broad Market Monitors & Calendars

A selection of global market monitors that provide a broad market overview. Many of these screens are customizable to a specific country

WEI	Display World Equity Indices
WB	Display World Govt Bonds
WS	Display World Swap Rates
WCV	World Currency Values
CBQ / IBQ	Country / Industry Overviews
IM	Treasury & Money Market Rates
ECST	Economist Statistics
WECO	Economic Calendars – by country
ACDR	Earnings Announcement Calendar



## Communication Tools

Start to communicate with other Bloomberg customers and send to traditional internet e-mail addresses! Simply type the person's name (or address) and press <MSG>

<b>MSGM</b>	Message System Main Menu
<b>SPDL</b>	Create an address book of your contacts
<b>IB</b>	Instant Bloomberg. Real-time chat
<b>GRAB</b>	Type GRAB from any screen to send it as a msg attachment
<b>ANY</b>	BLOOMBERG ANYWHERE™
<b>BERRY</b>	Bloomberg for BlackBerry
<b>BBFO</b>	Voice & Video calls
<b>BBSQ</b>	Bloomberg Squawk.

## Finding Information

Enter any word(s) or phrase & press  to search the entire Bloomberg system for matching information. E.g.

A person: Alan Greenspan   
A company: Microsoft   
A currency: Euro 

## Security Analysis Equity E.g. T US <Equity>

Once you have found and entered the ticker for the Equity you wish to analyze – now enter any of these basic function codes

<b>DES</b>	Company Description
<b>CN</b>	Company News and Research
<b>MCN</b>	Most Popular News for this company
<b>MGMT</b>	Management Structure & Profiles
<b>GPO</b>	Price Graph (incl Open, High, Low data)
<b>GIP</b>	Intraday Price Graph
<b>PHDC</b>	Institutional and Insider Holders
<b>ANR</b>	Analyst Recommendations
<b>EM</b>	Earnings Matrix (multiple templates)
<b>RV</b>	Relative Value – Peer Group Analysis
<b>FA</b>	Financial Analysis Templates

## Customization & Shortcuts

<b>PDFQ</b>	Personal defaults – quick set up
<b>PDF</b>	Personal Defaults – full set up
<b>EASY</b>	Essential Tips & Shortcuts

## Customizable Monitors

Create a full screen display that will allow you to track a portfolio of securities and drag/drop any of your selected securities into charts, news and analytical windows for further analysis

## BLP Bloomberg Launchpad

From the Launchpad Toolbar click on 'Tools' and select 'Sample Views' to see ready-made displays



## Security Analysis Bond

E.g. BUD 09 <Corp> 

Once you have found and entered the ticker for the Bond you wish to analyze – now enter any of these basic function codes

<b>DES</b>	Bond Description
<b>GP / GY</b>	Price Graph / Yield Graph
<b>YAS</b>	Yield and Spread Calculator
<b>ALLQ</b>	Pricing Sources – Transparency of quotes
<b>ISSD</b>	Issuer/Debt Information
<b>DDIS</b>	Debt Distribution Chart & Data
<b>CRPR</b>	Current and Historical Credit Profile
<b>RV</b>	Relative Value
<b>CRVD</b>	Credit Relative Value

## Customer Service & Training Supports

24hr Global Help in real-time from the Bloomberg Help Desk. At any time press the <HELP> key twice on your keyboard to make contact with a Help desk representative

<b>TRAIN</b>	Links to training materials, Events, Seminars,
<b>CERT</b>	Enroll in Product Certification
<b>DOCS</b>	Search & print any documentation
	E.g. DOCS CONVERTIBLES
	DOCS LATEST
	DOCS CHEATSHEET

## Getting Started



FOR 24-HOUR ASSISTANCE,  
PRESS <HELP> TWICE.

### NAVIGATE THE BLOOMBERG PROFESSIONAL® SERVICE

<b>CONN DFLT</b>	Log on and off (login and password)
<b>CANCEL</b>	Abort the function – also displays Bloomberg contact numbers, keyword search and access to the Bloomberg learning center
<b>HELP</b>	Type a keyword, press <b>HELP</b> and you will get a complete search of our vast database
<b>HELP</b> <b>HELP</b>	Our Help Desk is available on-line, 24 hours a day, seven days a week
<b>GO</b>	Use after each function code to action the request
<b>MENU</b>	Back to the previous menu
<b>PANEL</b>	Move between Bloomberg windows
<b>PRINT</b>	Print current page
<b>#</b> <b>PRINT</b>	Print several sequential pages (e.g. <b>33 PRINT</b> to print 33 consecutive pages)
<b>PAGE FWD</b>	View the following page (within multiple pages)
<b>PAGE BACK</b>	View the previous page (within multiple pages)
<b>SHIFT</b> <b>GO</b>	List your previous eight commands (or type <b>LAST GO</b> )

### HOW TO SEND AND RECEIVE MESSAGES

<b>MSGM</b> <b>GO</b>	Main message menu
<b>MSG</b>	Retrieve messages sent to you
<b>JOHN SMITH</b> <b>MSG</b>	Send a message to another Bloomberg user (or type <b>MSG JOHN SMITH GO</b> )
<b>JSMITH@BLOOMBERG.NET</b> <b>MSG</b>	Send a message to an Internet address (or type <b>MSG JSMITH@BLOOMBERG.NET GO</b> )
<b>MSG4</b> <b>GO</b>	Retrieve messages sent – unread messages sent to Bloomberg users will be flashing in blue
<b>SPDL</b> <b>GO</b>	Create personal speed dialers and groups of speed dialer names in your own electronic address book
<b>MSG5</b> <b>GO</b>	Message searches
<b>GRAB</b> <b>GO</b>	Send a Bloomberg screen

### CUSTOMIZE THE BLOOMBERG PROFESSIONAL SERVICE

<b>BLP</b>	<b>GO</b> Launchpad-customizable desktop (type <b>TRAIN GO</b> to request a demo)
<b>NW</b>	<b>GO</b> Create a personal market monitor ( <b>NWEG GO</b> : examples to copy, edit and customize)
<b>G</b>	<b>GO</b> Customize technical charts ( <b>GEG GO</b> : examples to copy, edit and customize)
<b>NRC</b> <b>GO</b>	<b>22 GO</b> Set the language preference for news stories
<b>LANG</b>	<b>GO</b> Set the language for the BLOOMBERG PROFESSIONAL® service
<b>PHONE</b>	<b>GO</b> Access your e-mails and quotes from your phone or PDA (right mouse click for additional customizable functions)
<b>PDF</b>	<b>GO</b> Bloomberg default settings
<b>ALT</b>	<b>B</b> Create personalized buttons on your toolbar
<b>ALT</b>	<b>T</b> Hide/view your toolbar
<b>FMP5</b>	<b>GO</b> Select security pricing providers

### NEWS FUNCTIONS

<b>N</b>	<b>GO</b> Main news menu. Type a keyword in the yellow field to search for all news on a particular topic. Once you have accessed a news story, type <b>9 GO</b> to print
<b>TOP</b>	<b>GO</b> Top stories
<b>TOP STK</b>	<b>GO</b> Stock market news
<b>TOP BON</b>	<b>GO</b> Bond market news
<b>TNI</b>	<b>GO</b> News filter
<b>ALAN GREENSPAN</b>	<b>HELP</b> <b>7 GO</b> Information on a person
<b>BSP</b>	<b>GO</b> Main sports news menu



## MARKET PERSPECTIVE

<b>WECO</b>	<b>GO</b>	World economic calendar
<b>IM</b>	<b>GO</b>	World market monitors
<b>ESNP</b>	<b>GO</b>	Economic statistic's snapshots
<b>FOMC</b>	<b>GO</b>	FOMC announcement dates
<b>WEI</b>	<b>GO</b>	World equity indices
<b>WEIF</b>	<b>GO</b>	World equity index futures
<b>WB</b>	<b>GO</b>	World bond markets
<b>WBF</b>	<b>GO</b>	World bond futures
<b>WIR</b>	<b>GO</b>	Interest rate futures
<b>MMR</b>	<b>GO</b>	Money market rate monitors
<b>WFX</b>	<b>GO</b>	World currencies
<b>IBQ</b>	<b>GO</b>	Industry analysis monitors
<b>CBQ</b>	<b>GO</b>	Country analysis
<b>ACDR</b>	<b>GO</b>	Earning announcement calendar
<b>FMC</b>	<b>GO</b>	Fair market curves
<b>IYC</b>	<b>GO</b>	International yield curves
<b>IRSB</b>	<b>GO</b>	Interest rate swap rates
<b>SWYC</b>	<b>GO</b>	Swap curves

## FINDING A SECURITY BY ISSUER

<b>COMPANY NAME</b>	<b>HELP</b>	<b>10</b>	<b>GO</b>	Select company
<b>EQUITIES:</b>	<b>BQ</b>		<b>GO</b>	Company overview
	<b>CN</b>		<b>GO</b>	Company news
<b>DEBT:</b>	<b>DES</b>		<b>GO</b>	Security description

**YAS** **GO** Yield and spread analysis

## OR IF THE TICKER IS KNOWN:

<b>CSCO US</b>	<b>EQUITY</b>	<b>GO</b>	Cisco Systems equity menu
<b>XRX</b>	<b>CORP</b>	<b>GO</b>	Xerox corporate securities

## FINDING GOVERNMENT SECURITIES

<b>GOVT</b>	<b>TK</b>	<b>GO</b>	Select a country
<b>YT</b>		<b>GO</b>	Yield/price table
<b>YA</b>		<b>GO</b>	Yield analysis
<b>GPO</b>		<b>GO</b>	Price graphs
<b>SEARCHES</b>			
<b>SRCM</b>		<b>GO</b>	Equity, fund, description, warrant and convertible bond searches
<b>ECDR</b>		<b>GO</b>	Equity calendar
<b>MA</b>		<b>GO</b>	Mergers and acquisitions analysis
<b>CACT</b>		<b>GO</b>	Corporate action calendar
<b>SRCH</b>		<b>GO</b>	Bond search
<b>NIM</b>		<b>GO</b>	New issue monitor
<b>PICK</b>		<b>GO</b>	Post and monitor municipal bond offerings

## MORE HELP AND TRAINING

<b>HELP</b>	<b>HELP</b>	Help desk available on-line, 24 hours a day, seven days a week
<b>BU</b>	<b>GO</b>	Bloomberg University – free seminars, on-line training and manuals
<b>BREP</b>	<b>GO</b>	Contact details of your Bloomberg representative
<b>API</b>	<b>GO</b>	Bloomberg data contributions in Excel
<b>SDK</b>	<b>GO</b>	Software Developer Kits (SDK)
<b>TRAIN</b>	<b>GO</b>	Request a Launchpad demo

Add optional 'tails' (shown in grey after a function mnemonic) to tailor a screen's output.

# A Simplified Guide to Bloomberg Ticker Symbols

**In order to analyze specific securities, you need to know how to enter the securities into Bloomberg  
This guide will tell you how to do just that!**

## GOVT GOVERNMENT BONDS

Government bond ticker symbols consist of 4 parts:

BLOOMBERG TICKER	DBR	Enter [GOVT], select TK [GO] to find government bond tickers
COUPON	6	You supply
MATURITY	16 or 16 or 2016 or 7/16 or ...	You supply; you may include the entire maturity date (mm/dd/yy)
DATABASE	[GOVT]	The yellow colored database key

Example of how to access the menu for the German Government bond, coupon 6% and maturing 2016:

Enter **[GOVT] TK [GO]**, click on the German flag and you will find the ticker DBR for German Bunds.

Enter **DBR 6 16 [GOVT] [GO]** to access the menu for this bond.

Important notes:

Omit the coupon and maturity to find all the bonds we carry under that ticker, for example enter **DBR [GOVT] [GO]**.

Any of the bond's several ID codes can be used to access the menu for the specific security,

e.g. **DE0001134468 [GOVT] [GO]**.

Advanced: Generic and Current Tickers - ask us what it is and how it can help you! Simply press the **[HELP]** key twice.

To view all price sources you have access to enter the ticker followed by the function **ALLQ [GO]**.

Also have a look at **MRKT [GO]**.

## CORP CORPORATE BONDS

Corporate ticker symbols consist of 4 parts:

BLOOMBERG TICKER	TELEFO	Enter [CORP], select TK [GO] to find corporate bond tickers
COUPON	4.5	You supply
MATURITY	9 or 09 or 2009 or 4/09 or...	You supply; you can include the entire maturity date (mm/dd/yy)
DATABASE	[CORP]	The yellow colored database key [CORP]

Example of how to access the menu for the Telefonica bond, coupon 4.50% and maturing 2009:

Enter **[CORP] TK [GO]**, enter the company name and you will find the ticker **TELEFO** for the bonds issued by Telefonica.

Enter **TELEFO 4.5 09 [CORP] [GO]** to access the menu for this bond.

Important notes:

Omit the coupon and maturity to find all the bonds we carry under that ticker, simply enter **TELEFO [CORP] [GO]**.

Any of the bond's several ID codes can be used to access the menu for the security, e.g. **ES0278430931 [CORP] [GO]**.

To view all price sources you have access to enter the ticker followed by the function **ALLQ [GO]**.

Also have a look at **MRKT [GO]**.

# A Simplified Guide to Bloomberg Ticker Symbols

MTGE

## MORTGAGE BONDS, CMOS AND ABS

The easiest way of calling up the menu for a specific Mortgage bond is via the bond's ID code. If you do not have an ID code then enter [MTGE] [GO] 1 [GO] and select the appropriate function under the heading "Finding a Security".

### Example using the ID code:

US00077BX578 [MTGE] [GO]

CRNCY

## INTEREST RATE SWAP RATES, FRAS, BASIS RATES, VOLATILITY, ETC.

Ticker symbols consist of 2 parts:

BLOOMBERG TICKER      EUSA5

Enter WCV [GO], select the currency of interest and a new menu will appear. Simply select the area of interest to view all tickers.

DATABASE

[CURNCY]

Usually the rates are stored under the [CURRENCY] or alternatively use the [INDEX] key

So the ticker symbol for the Euro 5 year interest swap rate is **EUSA5 [CURNCY]**.

Important notes:

Alternatively enter the full or partial name of the currency and press the green [HELP] key, enter 13[GO] and select the currency you wish to view, i.e. **POUND [HELP] 13 [GO] 1 [GO]** to select the menu for British Pounds. Now select the area of interest to locate the ticker symbols.

To view all price sources you have access to enter the ticker followed by the function **ALLQ [GO]**.

Also have a look at **MRKT [GO]**.

EQUITY

## EQUITIES

Equity ticker symbols consist of 3 parts:

BLOOMBERG TICKER      SIE

Enter the Company name followed by the green [HELP] key, click on no. 10 and then select the company in question

EXCHANGE CODE      GR

Automatically selected for the primary exchange when finding the ticker symbol via the [HELP] key

DATABASE      [EQUITY]

The yellow colored database key [EQUITY]

Example of how to access the menu for the primary stock Siemens AG in Germany:

Enter **SIEMENS [HELP]**, click on Siemens AG and press <go>.

The function **RELS** (Related Securities) appears with the ticker symbol shown at the top of the screen, **SIE GR**, hence the ticker **SIE GR [EQUITY]**.

Important notes:

By changing the exchange identifier to say **LN**, e.g. **SIE LN [EQUITY]**, the stock Siemens listed on the London stock exchange is selected. For exchange codes please enter **EMTK [GO]**.

**INDEX INDICES (EQUITY INDICES, ECONOMIC TIME SERIES AND OTHER DATA)**

**Index ticker symbols consist of 2 parts: An 8 character identifier and the Yellow Key [INDEX]**

BLOOMBERG TICKER    DAX

Enter WEI [GO] for the main equity indices and change the field named "Ticker" (top left hand side) to Y to view the tickers symbols.

For economic statistic tickers enter [INDEX] [GO] 2 [GO] and select the database you are interested in, for example ECST [GO].

Now select the country, the area of interest and you will see the relevant ticker symbols.

DATABASE                [INDEX]

The yellow colored database key [INDEX]

So the ticker symbol for the German DAX index is **DAX [INDEX]**.

The inflation rate for Denmark is **DNCPIY0Y [INDEX]** and so on.

Important notes:

Alternatively, enter the index name followed by the [HELP] key and select **12 [GO]** from the menu to locate tickers.

**EQUITY EXCHANGE TRADED OPTIONS ON EQUITIES**

Equity option ticker symbols consist in principle of 2 main parts: The first part includes the underlying stock ticker and information on the option and the second part the database:

BLOOMBERG TICKER    SIE GR 10 C44

Enter the underlying equity followed by the function **OMON**, for example **SIE GR [EQUITY] OMON [GO]**, click and hold on the ticker to view the symbol at the top of the drop down menu.

DATABASE                [EQUITY]

The yellow colored database key [EQUITY]

So the ticker for a call option on Siemens expiring in October with a strike price of 44 is **SIE GR 10 C44 [EQUITY]**.

Important notes:

Note that tickers for US and some other countries are constructed differently and often according to other conventions.

Therefore it's essential to use the function **OMON** as described above to locate the appropriate ticker.

**CRNCY CURRENCIES**

Currency ticker symbols consist of 2 parts:

BLOOMBERG TICKER    GBP

The ticker symbol is the ISO code, e.g. GBP for British Pounds (against USD)

DATABASE                [CURNCY]

The yellow colored database key [CURRENCY]

So the ticker symbol for British Pounds against US Dollars is **GBP [CURNCY] [GO]**.

Important notes:

**WCV [GO]**, select the currency of interest and a new menu will appear. Simply select the area of interest to view all tickers.

Cross rates are usually constructed by combining the 2 ISO codes, for example **GBPJPY [CURNCY]** for the British Pound/Yen cross rate. To view all price sources you have access to enter the ticker followed by the function **ALLQ [GO]**.

Also have a look at **MRKT [GO]**.

# A Simplified Guide to Bloomberg Ticker Symbols

## CMDTY BOND FUTURES, INTEREST FUTURES, INDEX FUTURES, CURRENCY FUTURES, ETC.

Future contract ticker symbols consist of 4 parts:

BLOOMBERG TICKER RX

Enter **CEM [GO]** or **CTM [GO]** to find the 2 letter ticker (2nd letter may be "blank")

EXPIRY MONTH H

International recognized symbols, for example H = March, M = June, U = September, Z = December

EXPIRY YEAR 3

0 = 2000 1 = 2001 2 = 2002 3 = 2003 4 = 2004 etc.

DATABASE [CMDTY]

The yellow colored database key **[CMDTY]**

Enter **CEM [GO]**, page forward for Europe, select the exchange where listed and locate the ticker - the symbol is **RX** for the 10y Bond Futures traded on Eurex.

So the ticker symbol for the German 10 year bond future expiring in March 2003 is **RXH3 [CMDTY]**.

Important notes:

By replacing the expiry month & expiry year with the letter A (A for Active) e.g. **RXA [CMDTY]**, **L A [CMDTY]**, etc. the Bloomberg will automatically select the actively traded contract usually measured by volume.

Alternatively the month and expiry year can be replaced with the number 1, 2 or 3 etc, e.g. **RX1 [CMDTY]** and Bloomberg will automatically string all the actively traded contracts together so that long term history can be generated. 1, 2, 3 etc. indicates the starting point i.e. 1 is the near contract, 2 is the second contract, etc.

## CMDTY OPTIONS ON FUTURES

Options on Futures ticker symbols consist of 2 main parts: The Future's ticker and an options part (Put / Call / Strike/Price).

BLOOMBERG TICKER RXZ3P 110

Consists of the future ticker, a Put or Call "indicator" and a strike price, use the function **OMON [GO]** to find ticker, e.g. enter **RXZ3 [CMDTY] OMON [GO]**, click and hold on the ticker to view the symbol at the top of the drop down menu.

DATABASE [CMDTY]

The yellow colored database key **[CMDTY]**

So the ticker symbol for the call option based with a strike price of 112 on the German 10 year Bund future expiring Dec 03 is **RXZ3C 112 [CMDTY]**.

## INDEX MONEY MARKET RATES

Ticker symbols consist of 2 parts:

BLOOMBERG TICKER CIB006M

Consists of up to 8 characters. Tickers can be found via **WCV [GO]**, elect the currency you are interested and then select the area.

You may also try **MMR [GO]**.

DATABASE [INDEX]

The yellow colored database key is either **[INDEX]** or **[CURRENCY]**

For example the ticker symbol for the Danish 6 month Deposit rate is **CIB006M [INDEX]**.

Important notes:

To view all price sources you have access to enter the ticker followed by the function **ALLQ [GO]**.

Also have a look at **MRKT [GO]**.

## A Simplified Guide to Bloomberg Ticker Symbols



FOR 24-HOUR ASSISTANCE,  
PRESS [HELP] TWICE

### INDEX ENERGY

Energy tickers symbols consist of 2 parts:

BLOOMBERG TICKER    USCRWTIC

DATABASE

[INDEX]

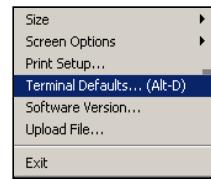
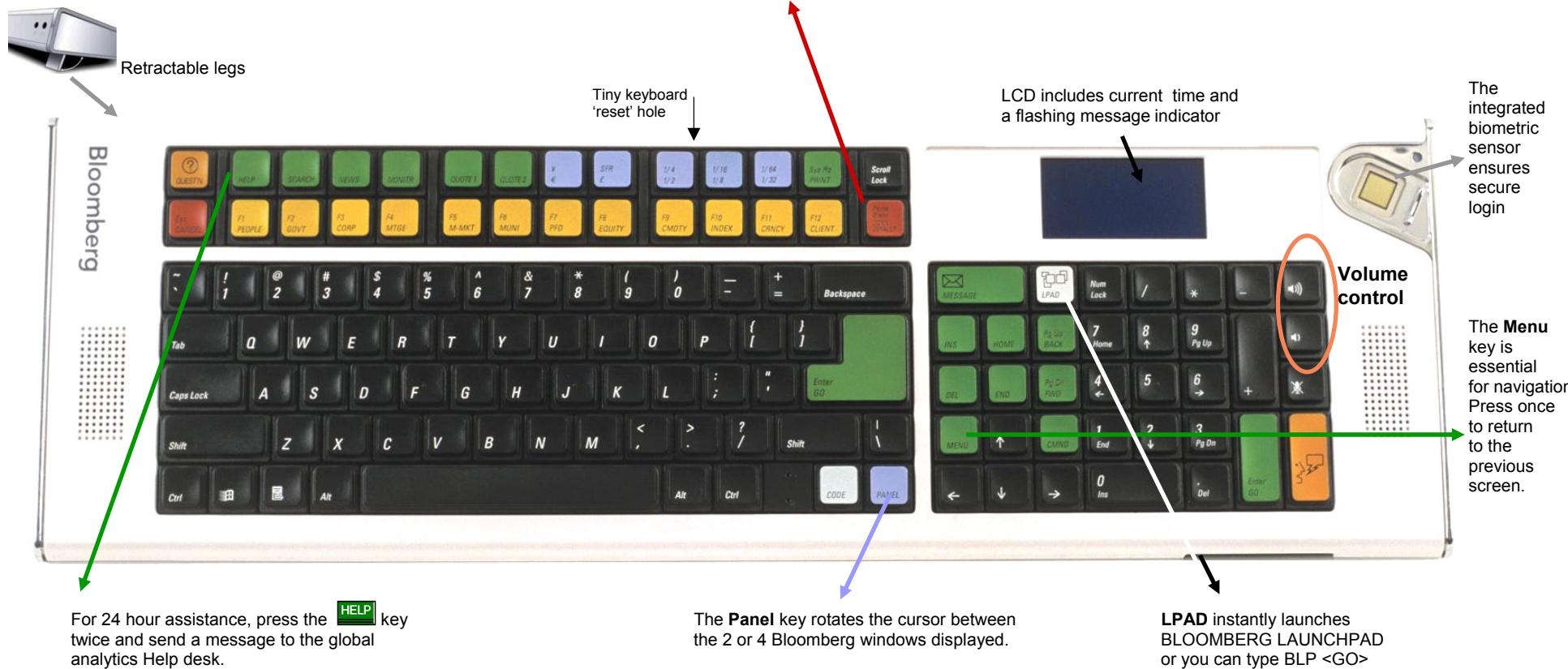
Enter **NRG [GO]**, click on for example OIL (no. 4), then on CRUD (no. 5) to locate the tickers for Global spot prices. Now type **4 [INDEX] [GO]** to view the ticker for WTI Cushing oil which is **USCRWTIC [INDEX]**.

The yellow colored database key **[INDEX]**.

IF YOU NEED ANY HELP PLEASE PRESS THE  KEY TWICE AND STATE YOUR QUESTION!

## INTRODUCTION TO THE BLOOMBERG KEYBOARD

To log on to the BLOOMBERG PROFESSIONAL® service  
press the **DFLT** key.



Right mouse click, select 'Terminal Defaults' to customize specific settings, including:

- Enable point & click
- Ask before exiting – confirmation prompt before closing the Bloomberg software

Ensure 'Keyboard Type' is set to Bloomberg KEYBOARD

**Trouble Shooting:** If keys do not respond after Keyboard Type is specified as Bloomberg, re-set the keyboard as follow:  
Insert a paper clip into the small hole at the back of the keyboard between the  $\frac{1}{2}$  and  $\frac{1}{6}$  keys

## Keyboard Tricks & Tips



'Go' is equivalent to 'Enter' and should follow every function/command to activate that page.



Menu takes you back to the previous screen.



Scroll forward or back within a screen that contains multiple pages.



E.g. To move from page 2 to page 15, type 13 and press **Page Fwd**.



A Re-cap of the previously used function appears in the top left of the screen each time you p

**LAST** <GO>

Manually type LAST to review the last 8 functions used.



Press print once to print the current page.

#

# = the no. of pages you wish to print. E.g. If this is a 5 page function or news story, press 5 & **Print**



Press Help key once to display the on-line Help and description of how to use the current function



Press the Help key twice to make e-mail contact with the 24 hour Help desk

**EASY** <GO>

A list of Bloomberg tips and shortcuts

**HDSK** <GO>

A list of all your historical questions and answers sent/received from the Bloomberg Help Desk

<Alt> K

Display a graphic of the Bloomberg keyboard



This key appears to the left of the space bar on your keyboard. Combine it with:

Key + E To open a new file 'Explorer' window

Key + D To minimize/restore all windows

**Helpx2**

Press the <HELP>  
key twice for instant  
live assistance.

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