

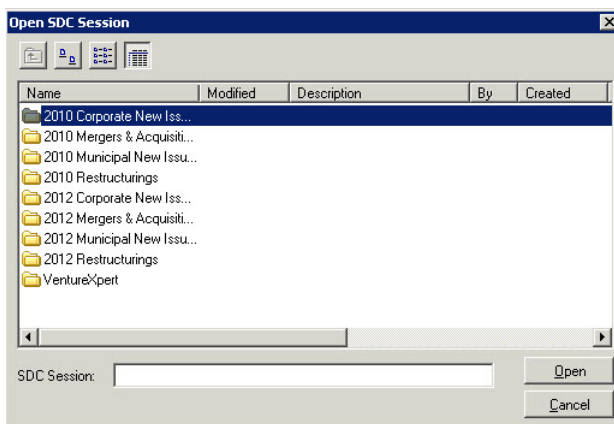
Chapter 6 Helpful Utilities

SDC Platinum includes several utilities to help in creating and reusing searches and reports.

SDC Standard Sessions

There are a number of standard sessions available to SDC Platinum users. These sessions are regularly reviewed by a roundtable of clients and revised as necessary to reflect current practices.

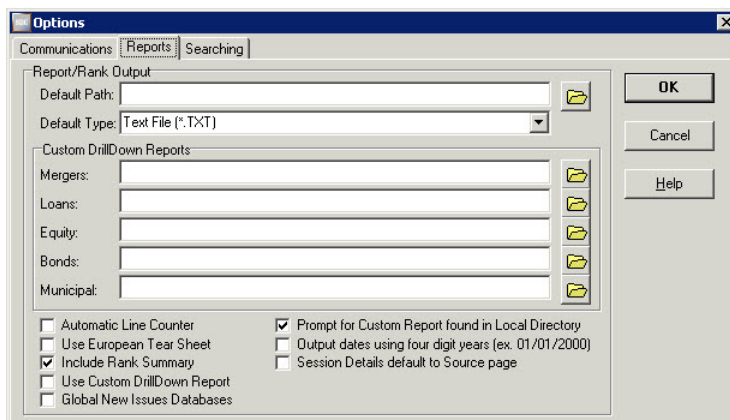
1. Select **Session > Open Existing > SDC Standard**.
2. Navigate through the folders to the session you want to open.



Regional New Issues Marketplaces

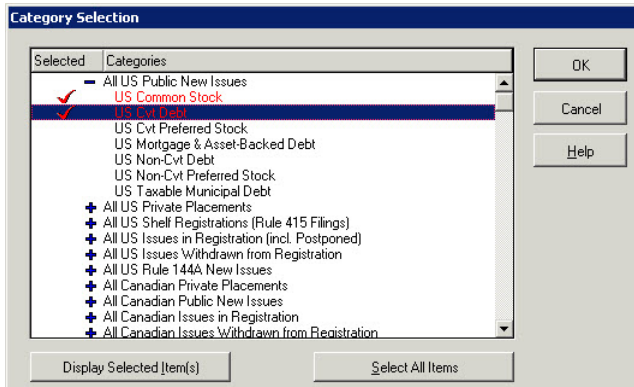
There are several regional New Issues Marketplaces available as alternatives to the Global New Issues database.

1. In the Main Session window, select **Utilities > Options**.
2. In the **Reports** tab, clear the **Global New Issues Databases** check box.



3. Click **OK**.

4. Start a new session.
5. On the **Global New Issues** tab, select one or more **New Issues Marketplaces**.
6. Click **OK**.
7. In the Category Selection window, select one or more categories.

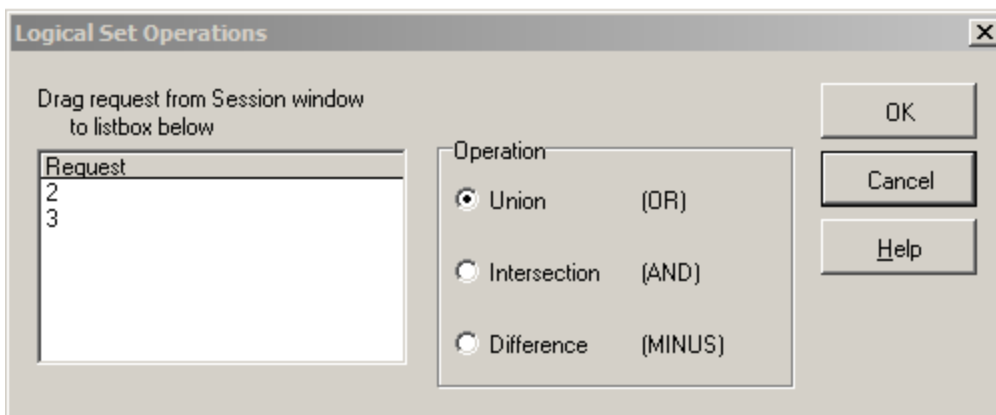


8. Click **OK**.
9. Specify dates and search for items as in any other SDC Platinum database.

Logical Set Operations

You can use Boolean logic to do the following:

- Union - combine the results of two or more requests (OR)
 - Intersection - find the common transactions in two or more requests (AND)
 - Difference - subtract the transactions in one or more search requests from another (MINUS)
1. From the **Utilities** menu, select **Logical Set Operations**.



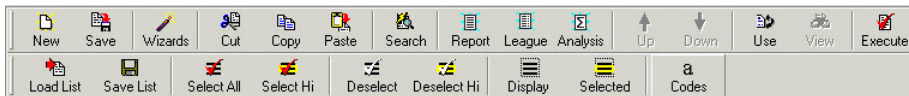
2. Drag the requests from the Main Session window Request Description list box to the Request # list box of the Logical Set Operations window. The request numbers appear in the Request # list box.
3. Select:
 - **Union**
 - **Intersection**

- **Difference** (remember to enter the sequence numbers in the correct order)
4. Click **OK**. The Boolean request is added to the Request Description list box of the Main Session window.
 5. **Execute** the requests.

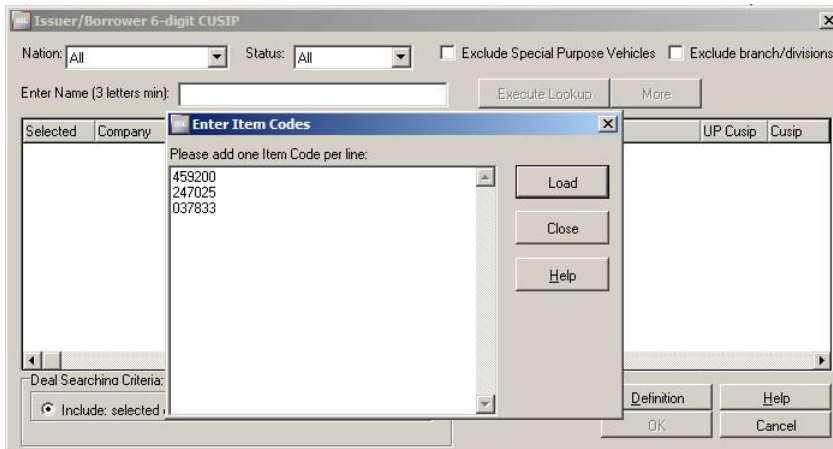
Import Items from a List

You can import items from a pre-existing list rather than input them individually.

1. From the **Issuer/Borrower** tab, double-click **Issuer/Borrower 6-digit CUSIP**.
2. Click **Codes**.



3. Copy and paste a list of CUSIPs from a text or other file.



4. Click **Load**.
5. Click **OK**.

Create a List of Distinct Values

After you have executed a search, you can create a list of distinct values from the results. You can name the list so you can recall it at a future time.

1. Select **List Management > Distinct**.
2. Click the down arrow to display a list of values.

3. Select a value.



4. Click OK.
5. Select the drive and directory where you want to save the list or click the **Group** down arrow, and select the group.
6. In the **List Name** text box, type the name of the list.
7. Type a description and comments if you want.
8. Click OK.

The **Executing Lookups** window opens, showing the phase and number of transactions. When the execution is complete, SDC Platinum returns to the Main Session window

Note: If you see a message that the matches exceed the maximum number and will be saved on the host, click **OK**. You will not be able to load and edit very long lists of values.

Top N Deals

SDC Platinum lets you identify the top deals in your search results, such as the top 10 M&A deals by value or the top 25 common stock issues by manager fees.

1. Select **Utilities > Top N Deals**.

You may specify an item code by directly typing in the editbox or clicking on the listbox

Item Code: Top Deals

Item Description	Item Code
% Chg Yesterday's Pr to Offer	PCTCUR
Amount Total on Prospectus All Markets (\$ mil)	TOTPROSAMTUSD
Amount Total on Prospectus All Markets (host mil)	TOTPROSAMT
Gross Spread as % of Principal	GPCT
Loan Package Amount (US\$ mil)	DEAL_AMOUNT
Number of Shares Offered	SH
Offer Price	P
Principal Amount of Issue	AMT
Proceeds Amount + Overallotment Sold All Markets (US\$ Mil)	RANK1_OVERALLOT_TOTDOLAMTF
Proceeds Amount + Overallotment Sold This Market (US\$ Mil)	PROOVSLD
Proceeds Amount All Markets (US\$ Mil)	R_TOTDOLAMTPRN

Select

☒ Deals with Top N Values (include ties) ☐ Top N Deals (ignore ties)

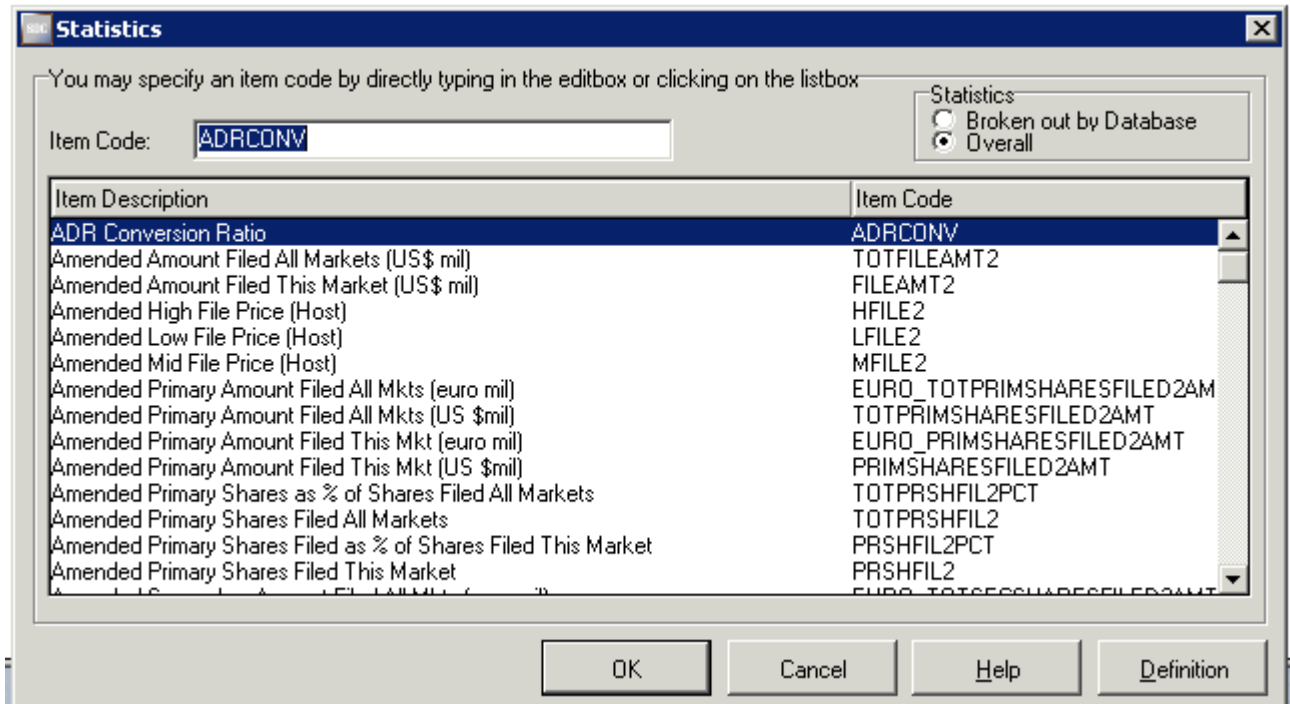
OK Cancel Help Definition

2. Select an item description or, in the **Item Code** text box, type a code.
3. In the **Top N Deals** box, select the number of deals you want to display.
4. Choose to include or ignore ties.
5. Click **OK**. The request is added to the Request Description list box on the Main Session window.
6. **Execute** the requests.

Statistics

You can use the statistics feature to calculate aggregate data, such as the sum, minimum, average, maximum, and median, on your search results.

1. Select **Utilities > Statistics**.



- Click on an item code or in the **Item Code** text box, type the code.
- Select **Detailed** or **Overall**.

Note: Detailed gives a breakdown by specific database. If you are querying on only one database there will be no difference between Detailed and Overall.

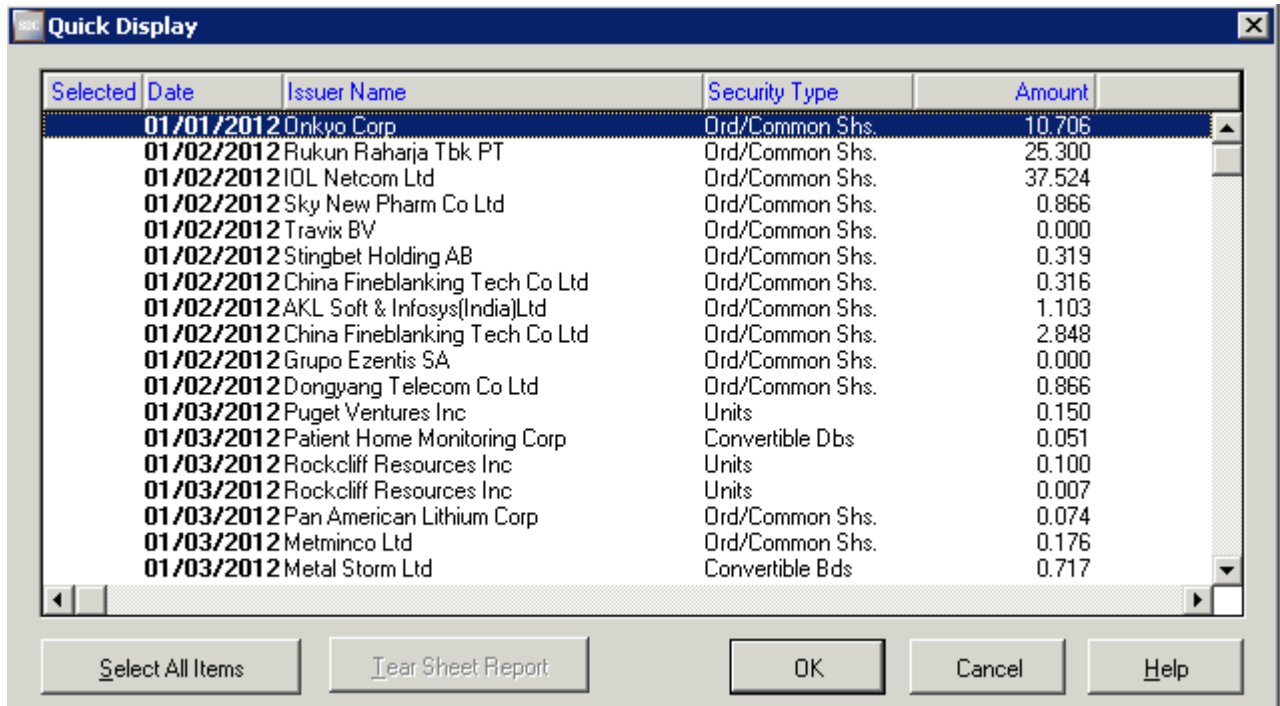
- Click **OK**. The request is added to the Request Description list box on the Main Session window.
- Execute** the requests.

Quick Display

The SDC Platinum Quick Display feature allows you to display a list of transactions for the current search result. You can select transactions to keep or exclude from your search result. You can also request a detailed report on selected deals.

1. Select **Utilities > Quick Display**.
2. Choose either **Standard Display** (the most common data items requested) or **Custom Display** (specify your own data items)

Note: The Executing Lookups window shows you the phase and number of matches. When the search is complete, the Quick Display window lists transactions for your request.



Note: The transactions are sorted by date. You can click on a column heading to sort the transactions by that heading. Click once to sort in ascending order; click again to sort in descending order.

3. Double-click the transactions to keep or exclude.

Note: If you want to see a tearsheet on a selected transaction, click **Tearsheet Report**.

4. Click **OK**.
5. Select **Keep** or **Exclude** for selected transactions. The request is added to the Request Description list box on the Main Session window.
6. **Execute** the requests.

Save a Session

Saving a Session will save all the requests listed in the Request Description list box of the Main Session window. The requests can include search, report, and/or League Table criteria. After you save a session, you can load it whenever you want. You can then modify any of the criteria listed in the Request Description list box.

To save a new session:

1. Click **Save** or select **Session > Save As**.
2. Select the drive and directory where you want to save the session or select the Group.
3. In the Session Name text box, type the name of the session.
4. Type a description and comments if you want.
5. Click **OK**. SDC Platinum saves the session.

Save a Search Result

Saving a Search Result saves the results of the last executed search request. If the last request is a report or League Table request, SDC Platinum will find and save the last executed search request.

1. Make sure you have executed your session.
2. Select **Utilities > Save Current Search Result**.
3. Select the drive and directory where you want to save the search result or select the group.
4. In the Search Result Name text box, type the name of the search result.
5. Type a description and comments if you want.
6. Click **OK**.
7. SDC Platinum saves the search result and returns to the Main Session window.
8. **Execute** the saved search result.

Save a Custom Report Format or League Table Criteria

1. Create your custom report format or custom League Table criteria and click **OK**.
2. Select the drive and directory where you want to save the custom report format or League Table criteria or select the group.
3. In the Custom Report or Rank Name text box, type the name of the custom report format or League Table criteria.
4. Type a description and comments if you want.
5. Click **OK**. SDC Platinum saves the custom report format or League Table criteria. You can format your report or League Table, for example add titles, search details, and summary statistics, or sort data.

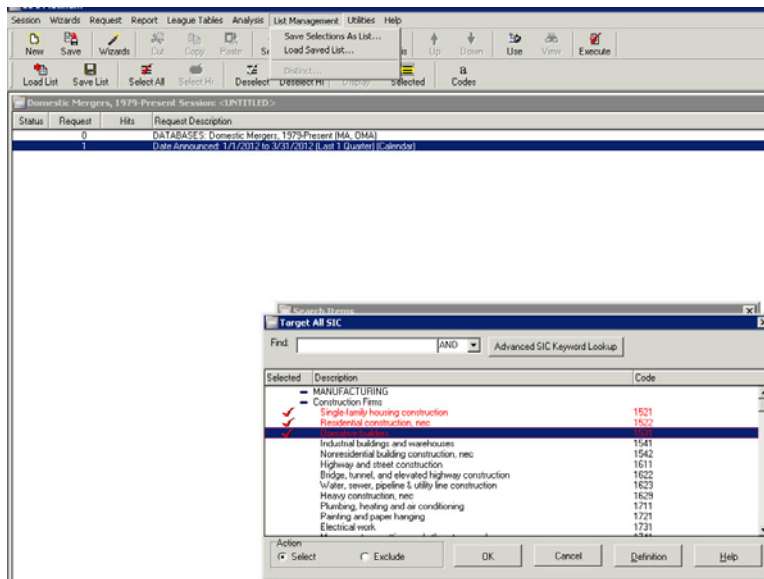
Saving and Loading a List of Selections

You can save groups of frequently used items such as CUSIP numbers, SIC codes, ticker symbols, and security codes for use in later searches. You can load and use the saved lists to search any SDC database.

To create a list of selections, you must be in the specific window. For example, to create a list of Target SIC codes, you must be in the Target SIC Codes window.

1. From the Search Items window select the items to include in your list.

2. Select **List Management > Save Selections As List**.



3. Select the drive and directory where you want to save the session or select the group.
4. In the List Name text box, type the name of the list.
5. Type a description and comments if you want.
6. Click **OK**. SDC Platinum saves the list.
7. To load a saved list, select **List Management > Load Saved List**.

Create Your List of Favorite Data Items

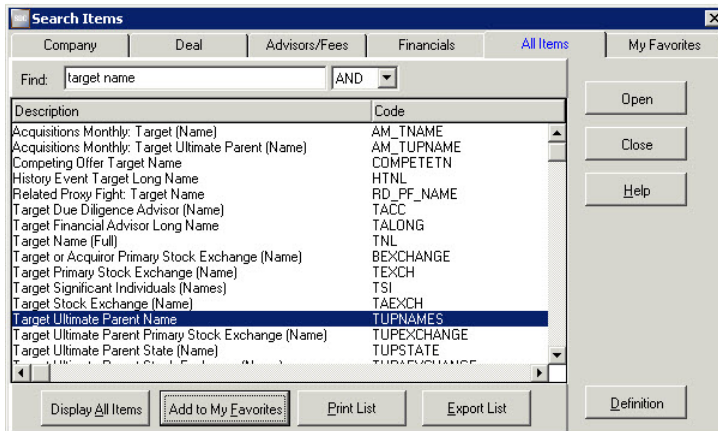
You can use the Search Items window **List** tab to create a list of data items you use regularly. The data items open in the Search Items window **My Favorites** tab. In addition, your SDC Platinum administrator can create a list of data items your company uses regularly.

1. Click **Search** and select the **All Items** tab or select **Request > Search > Items** and select the **All Items** tab.
2. In the **Find** text box, type at least three characters of a data item or code and press **Enter**.

Note: The characters can be anywhere in an item description or code. For example, if you type **value**, SDC Platinum displays all data items with the word value in the description, such as Market Values and Value of Common Shares.

3. You can type more than one word in the Find text box (e.g., total fee) and select **AND** or **OR**. **AND** finds data items with all the words in them (e.g., all data items with "total fee"). **OR** finds data items with any one of the words in them (e.g., all data items with "total" or with "fee").
4. Scroll through the displayed list and select a data item.

5. Click **Add to My Favorites**. The item is added to the Search Items window **My Favorites** tab.



6. Click **Close**.

Managing SDC Platinum Files

You can delete, move, or copy your saved SDC Platinum files from SDCTools File Explorer, or Windows Explorer. The following table lists the SDC Files and their extensions:

Extension	File type
ssh	Sessions
lst	Lists
rpt	Report formats
rnk	Rank formats
qrs	Search results