

**160:266 Financial Management & Markets****Rod Library**

Most of the databases listed on this page can be accessed from the [Rod Library](#) home page (see Databases A-Z in middle of page) and from the Rod Library [Business Portal](#). The Business Portal also can be reached from the College of Business Administration home page under the Students tab, then Educational Resources. If accessing Rod Library subscription databases from off campus, you will get a prompt to enter your last name and UNI ID number.

Some additional guides listed on the left side of the Business Portal home page may be useful this class: Company Research Steps, Industry Research Steps, and Library User Guides. There are separate Library User Guides or handouts for Companies, Industries, and Strategic Analysis. The [Company Research Steps](#) page, for example, points out important types of company information and search tools, such as annual reports to shareholders and 10-K annual reports (e.g., [Procter & Gamble](#)).

This handout divides Rod Library subscription databases into three categories: Finding Articles, Finding Company Data and Analysis, and Finding Market and Industry Reports. Several databases in the three categories actually are good for finding all three types of information.

**Finding Articles in Academic Journals, Trade Journals, and Business Magazines: Companies, Industries, Markets**

The databases in this section index and include the full text, in some cases, of academic journals, trade journals, and business magazines. If the database does not have the full text of a certain article, look for a yellow Find It! button. This may link to the full text online in another database licensed by Rod Library. Google Scholar also can be an effective database for finding academic journal articles about companies. If off campus, go to Scholar Preferences and add University of Northern Iowa to Library Links; this will cause the Find It! link to appear next to article titles in journals licensed by Rod Library.

**Business & Company Resource Center (Includes Business Index ASAP)**

- Company lookup leads to: profile; articles arranged by topics such as Financial Data, Management, and Strategy; tabs at top for History, Investment, etc.
- Articles tab can be used to find articles under company as "subject headings," with detailed subdivisions
- Advanced Search can be used to look for articles on specific topics in parts of articles like Full Text or Title

**ABI/INFORM Global**

- Online thesaurus of business vocabulary can help in identifying good search terms (look under "Browse Topics" on right side of screen)
- Sources include full text of Wall Street Journal articles back to 1984
- Advanced Search feature: broaden search by looking in Document Text; Narrow search by looking in Document Title, Company/Org, Subject
- Search results grouped by publication type: Academic Journal, Trade Publication, etc.
- Articles may include link to company information in Hoover's

**Business Source Elite**

- Advanced Search can be used to look for articles in specific parts of articles like Full Text or Title
- Search results can be arranged by publication type: Academic Journal, Trade Publication, etc
- Company Profiles (see link at top of screen) provide SWOT analysis for larger companies (strengths, weaknesses, opportunities, threats)

**Panther Prowler**

- Business databases can be searched simultaneously using the Panther Prowler interface
- This can be very convenient for some types of searches but does not have the power of individual database searches
- Panther Prowler option available from top of Business Portal, and from Rod Library home page (pick Field of Study such as Finance)

**Finding Company Data and Analysis**

Additional financial databases, such as CRSP and Standard & Poor's Research Insight, are administered by the College of Business Administration and available in CBA classrooms/labs; see software section [at this CBA page](#).

**Mergent Online (click "enter Mergent Online" link on left side of screen after reaching database)**

- Basic Search/Ticker symbol: can enter multiple symbols: adp,axp,ba,bby, etc.
- From Company Details page for particular firm, can request up to 15 years of financials and ratios
- In Create Reports section, can Compare Company With Industry or Against Custom Group of companies
- Company result contains links to SEC filings and annual reports to shareholders
- Company Analysis list can be used to create customized company comparison reports and multiple company reports

**Standard & Poor's NetAdvantage**

- Select company or industry from right side of initial screen; or pick Companies or Industries tab at top
- Company lookup leads to data and analysis from various S&P sources: financials, competitors, industry information, etc.
- Interactive company stock report analyzes stock using S&P STARS methodology
- Contains industry analysis, such as Industry Surveys, reported by named S&P analysts

**Morningstar Investment Research Center**

- Ticker/company name lookup upper left side of screen
- Covers stocks, funds, ETFs, and industries
- Analyst reports include investment notes, thesis, valuation, risk, management, etc.
- Analyst reports also include Bulls say/Bears say argument summary

-Portfolio x-ray: enter tickers for stocks, bonds, funds, etc. and get various analyses of portfolio

#### Value Line Investment Survey

- Lookup Company and Lookup Industry on left side of screen
- One page signed company analysis pages with data and text on large companies
- Also contains one page analysis of each industry covered

#### LexisNexis Academic

- Various types of publications on companies: Investext Current Reports, Financials, articles, etc.
- See direct link in Business Portal to Investext Current via LexisNexis - Investext full reports in PDF
- On initial page, click Companies box in lower right before doing company lookup; displays article list with other types of publications listed on left
- OR on initial page, click Business tab in upper left, enter company name or ticker symbol to get profile; other types of information are displayed on left;
- Reference heading on left of Company Dossier page for specific company may include Research & Analyst Reports

#### Finding Market and Industry Reports

These three databases provide reports on the buyers or sellers in various markets and industries. Additional reports may be available from trade associations, sometimes for no charge, and from governments. The databases above also contain various market and industry information.

#### Mintel

- Must create personal account first time log on, then access with personally created user name and password thereafter
- Contains reports on consumer product markets in the U.S. and other countries: video games, fine dining, fruit juices, sports events marketing, etc.
- Also contains reports on life stages: spending power of teen consumer, attitudes of women aged 18-34, etc.
- Simple search box in upper right corner of screen
- Reports typically cover: market size, segment performance, channels, market drivers, consumer purchasing habits, etc.

#### IBISWorld

- Contains industry market research reports on some 700 industries: soft drink production, cereal production, footwear manufacturing, etc.
- Reports discuss strategic issues and typically cover: market characteristics like market size, demand determinants, and basis of competition
- Also: industry performance, industry conditions, and outlook

#### Business & Company Resource Center

- Pick Advanced Search, then change drop down for Content Area to Industry Overview
- May want to change what's being searched from Keyword to Full Text
- In addition to Industry Overviews, look for green Market Research tab in upper right corner of screen

#### Tracking Down Known Publications

Look for the sources used by authors in their articles and other publications. The sources may be fully cited in a bibliography or referred to in a more general sense, such as the name of the organization or individual conducting the study. The sources may be online or in print; they may be free to the general public, available only for a fee per article or report, or available for no charge to you because Rod Library has licensed the source for use by UNI students and employees.

To track down known, cited publications, use tools such as the [Rod Library catalog](#), the [Rod Library Article Locator](#), or [Google/Google Scholar](#). Rod Library also offers a service called "[Interlibrary Loan](#)," which can be used to obtain publications from other libraries.

#### Keeping Track and Citing Sources

It is a good idea to plan your search - which databases and search terms to use - and to keep track of what you've done in order to avoid duplicating effort. Authors whose exact words are used in a report should be quoted and cited in the reference list. Authors whose ideas are paraphrased also must be cited, unless the idea is actually common knowledge.

The Chicago Manual of Style (required for this class. A print copy of this book is located at the Rod Library Reference Desk)

UNI RefDesk CBT Z253 .U69 2003

[This quick guide](#) from the The Chicago Manual of Style Online provides tips on how to cite different types of publications. [This guide](#) from the Harvard Business School and [this one](#) from Boston University provide more detailed tips for citing business sources in Chicago style.

#### Help - IM, Telephone, Email, Face-to-Face

Questions about how to use search tools and find information can be directed to the the Rod Library [Ask Us!](#) service via IM, email, telephone, or in person at the reference desk or by research consultation appointment. Questions also can be directed to the Rod Library reference librarian for business areas via the [Rod Library Business Portal](#). (See IM window on left side of screen.) Two Rod Library librarians, Stan Lyle and Tom Kessler, also have hours in the Curris Business Building main floor student lounge Mondays from noon to 2 and Thursdays from 10 am to noon.

Stan Lyle, Rod Library 2/19/09