

DATASTREAM

VERSION 5.1

GETTING STARTED



THOMSON REUTERS

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THOMSON REUTERS

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Introduction



Overview

Datastream's data coverage

Data selection

Starting Datastream and AFO

OVERVIEW

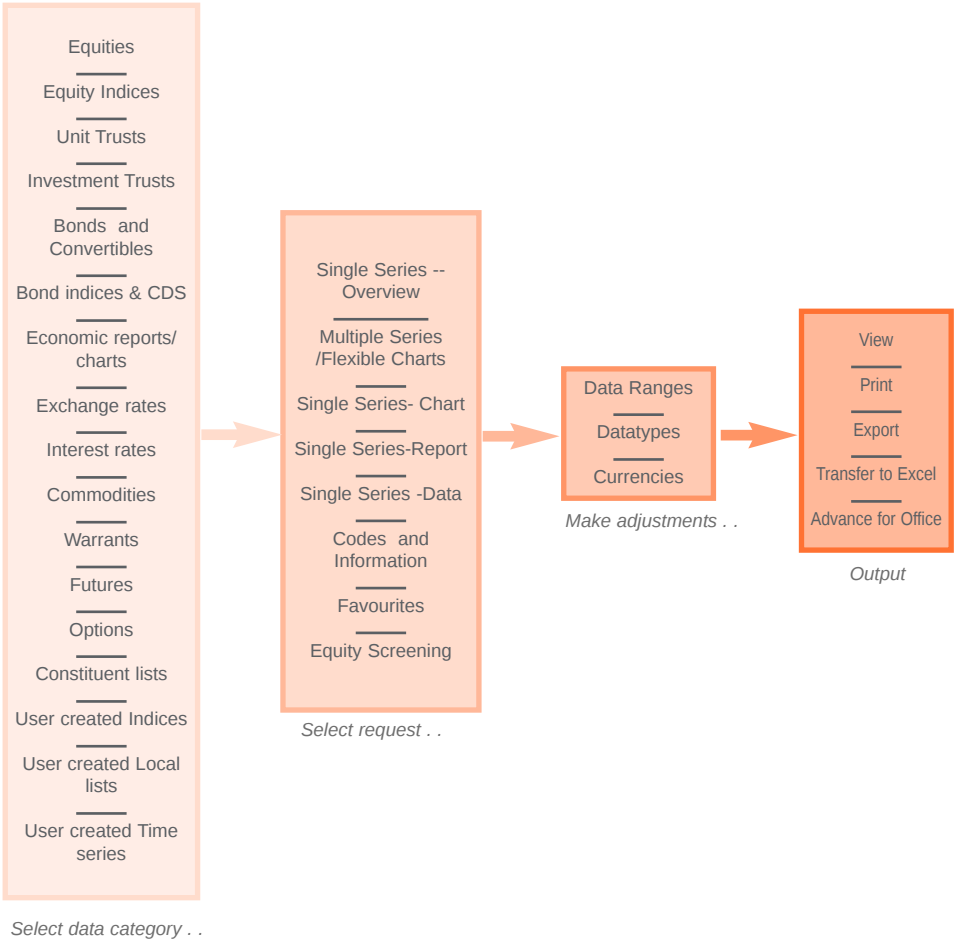
Datastream gives you access to the world's largest and most respected historical financial numerical database. Datastream provides a range of charting and reporting tools that enable you to manipulate and display, or simply download that data in the way that you want. With Datastream you can also get a set of Microsoft Office add-ins that enable you to access the Datastream database directly from within Excel, Word, or PowerPoint - create and embed data requests that put the data you want straight into your spreadsheet, document, or presentation.

DATASTREAM'S DATA COVERAGE

Unrivalled depth and breadth of coverage across the full range of instrument types means immediate access to the data you need. Worldwide equity coverage direct from the stock markets, comprehensive market indices, economics data direct from national government sources as well as the OECD and IMF, fixed income securities and associated indices, commodities and derivatives data. Forecast earnings data from IBES, fundamental data from Worldscope and added value data sets from respected sources such as MSCI, DJ Stoxx and FTSE All World. And all data is quality checked and actively maintained by dedicated staff.

DATA SELECTION

Datastream provides an easy to use interface with most options for standard requests selectable by mouse click. Start by selecting a data category and follow this sequence to generate the output you require:



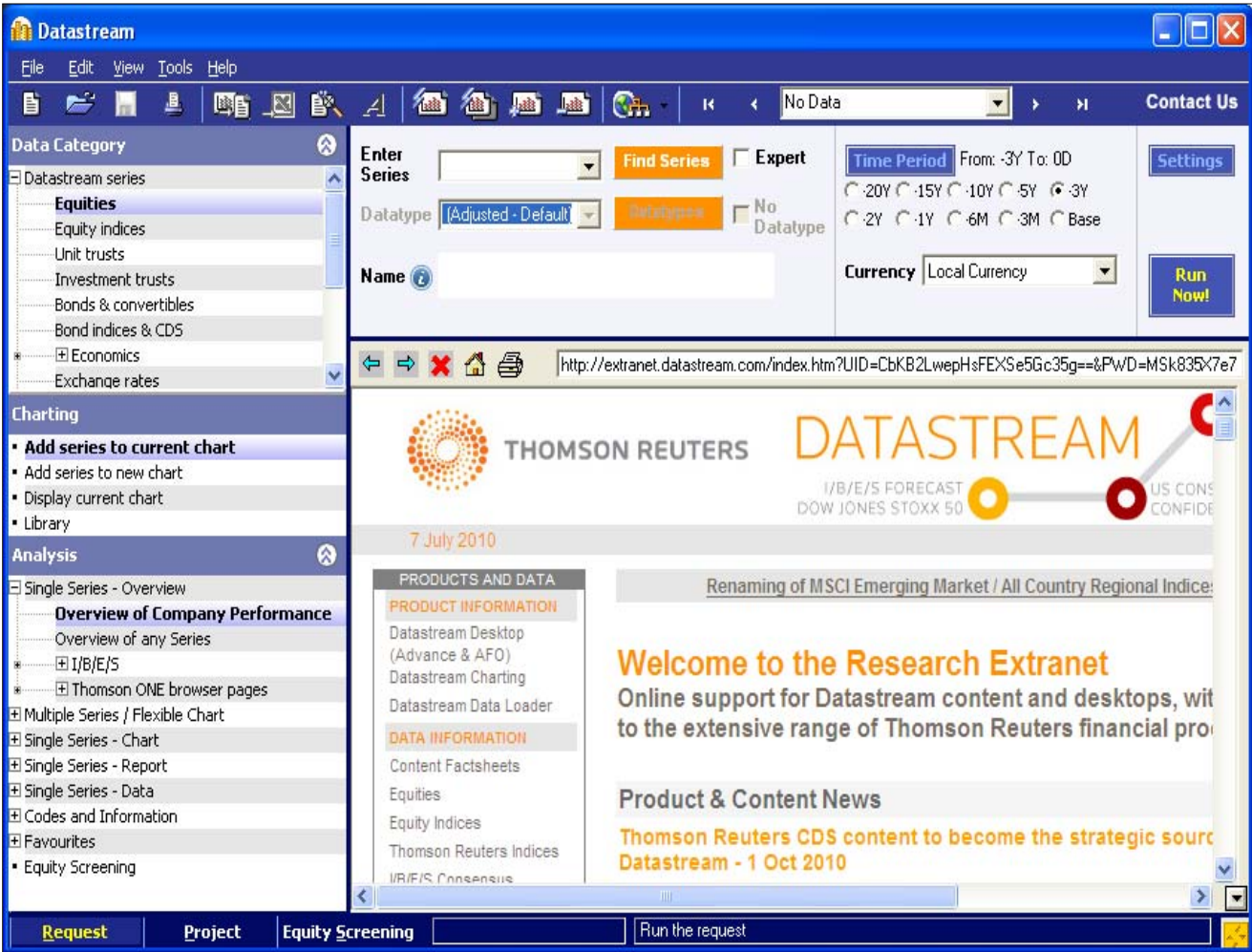
STARTING DATASTREAM AND ADVANCE FOR OFFICE (AFO)

Before you use Datastream, or Advance for Office, your systems administrator should have configured your communications link with the Datastream host. If you have any problems connecting to Datastream, please contact your systems administrator, or see *Configure Communications, Datastream Installation Guide*.

STARTING DATASTREAM

- Double click on the Datastream icon .

When Datastream has loaded successfully, the **Request** screen is displayed.



CLOSING DATASTREAM

To exit from the **Request, Project, or Equity Search** screen, select **Exit** from the **File** menu.

Note:
Remember to save or export those reports, charts, and data that you want to use again before you exit Datastream.

STARTING AFO

To use Datastream Advance for Office, open Office application and use the **AFO** drop down menu.

CLOSING AFO

Datastream Advance for Office closes when you close your Office application.

Using Datastream

- The Datastream interface
 - The tool bar
 - Making a request
 - Selecting a data category
 - Selecting the series
- Using Datastream Navigator - series search
 - Selecting types of request
 - Refining your request
 - Dates
 - Datatypes
 - Currency
 - Making your request

THE DATASTREAM INTERFACE

Link to Thomson Reuters sites via browser, including Research Extranet access.

The screenshot shows the Datastream software interface with several components labeled:

- Navigation Tool bar:** Located at the top left, containing icons for file operations, data retrieval, and charting.
- Series selection:** A tree view on the left showing categories like Datastream series, Equities, Equity indices, and Unit trusts.
- Datatype selection:** A dropdown menu next to the 'Enter Series' field, currently set to 'Adjusted - Default'.
- Charting:** A section on the left with options to 'Add series to current chart', 'Add series to new chart', 'Display current chart', and 'Library'.
- Report selection:** A section on the left with options like 'Single Series - Overview', 'Overview of Company Performance', 'I/B/E/S', 'Thomson ONE browser pages', 'Multiple Series / Flexible Chart', 'Single Series - Chart', 'Single Series - Report', 'Single Series - Data', 'Codes and Information', 'Favourites', and 'Equity Screening'.
- Datastream Project tab:** A tab at the bottom labeled 'Equity Screening'.

The main window displays the 'DATASTREAM EQUITIES' section for 'BT GROUP'. It includes a table of financial data and a line chart titled 'Price and Index (rebased)' comparing BT GROUP and FTSE ALL SHARE (PI) from May 1997 to April 2000.

DATASTREAM EQUITIES				BT GROUP	
Mnemonic - BT.A				Geography Code - UK	
Local Code - 3091357				Exchange - London	
Current Price	89.30	20/04/09	EPS		
12 Mth Range	High 235.50	19/ 5/08	PE		
	Low 71.40	11/ 3/09	PE Rel.		
Price Change (£)	1mth 7.2%	3mth -27.4%	12mth -58.8%		
Relative to FTALLSH	2.0%	-27.5%	-37.8%		
Market Value (£)	8916.10M				

The chart 'Price and Index (rebased)' shows two lines: a red line for BT GROUP and a blue line for FTSE ALL SHARE (PI). The x-axis represents months from May 1997 to April 2000, and the y-axis represents price/index values from 50 to 250.

Index Selection

Relative Index

Default Index

Periods

Market

DS Market Index
Local Market Index
MSCI Country Index in Local Currency DISC
MSCI Country Index in US Dollars DISC

Sector

DS Level 3 Sector Index
DS Level 4 Sector Index
DS Level 5 Sector Index
DS Level 6 Sector Index
MSCI All Markets Industrial Sector index in local curr
MSCI All Markets Industrial Sector index in US Dollar
MSCI CII Industry group index in local currency
MSCI CII Industry group index in US\$
MSCI CII Industry index in local currency
MSCI CII Industry index in US\$
MSCI CII Sector index in local currency

OK

Cancel

Help

Time Period

From: -1Y To: 0D

-20Y

-15Y

-10Y

-5Y

-3Y

-2Y

-1Y

-6M

-3M

Base

Currency

Local Currency

Settings

Run Now!

BT GROUP

21/04/09 7.59

Mnemonic - BTA

Geography Code - UK

Industry Group - TELFL

Local Code - 3091357

Exchange - London

Sector - TELFL

Current Price

89.30

20/04/09

12 Mth Range

High 235.50

Low 71.40

19/ 5/08

11/ 3/09

Price Change

1mth 7.2%

3mth -27.4%

12mth -68.8%

Relative to FTALLSH

2.0%

-27.5%

-37.8%

Market Value (£)

6916.10M

Dividend Rate (P)

15.79

Dividend Yield

17.69

Dividend Cover

1.2

Div Last Fin Year

15.80

Last Div Paid

INT (P)

5.40

Tax-N

24/12/08

Pay Date

09/02/09

XD Date

24/12/08

(£)

3/08

3/07

3/06

Total sales

19514M

20223M

20704M

Pre-Tax Prof.

2024M

2469M

1987M

Publ. EPS

18.40

34.40

21.50

Cash EPS

51.85

55.69

59.27

Mkt to Bk Val

11.91

5.93

3.13

ROE (%)

193.38

98.39

36.01

No. Shares in Issue

7744790(000s)

Volume

46399.8(000s)

Percentage of free float

90%

Volatility

14

Beta

0.970

Correlation

0.528

Next Decl.

AUG.09

Source: Thomson Reuters Datastream

Price and Index (rebased)

BT GROUP

FTSE ALL SHARE (PI)

Date button

Settings button helps you to configure the parameters for charts or reports

Currency selection

Results window

THE TOOL BAR



Create a new Project. Specify a name for the new Project when you Save the Project.



Open an existing Project. Choose from a list of Projects, save the details of the current Project before opening a new Project.



Save any additions or changes to the current Project.



Print the displayed request to the default Windows printer. If you want to specify another printer or change the printer settings, select File>Print to display the Windows Print dialog.



Export a chart, or a selected area of data, or a report in a format suitable for use with spreadsheets, word processors, etc.



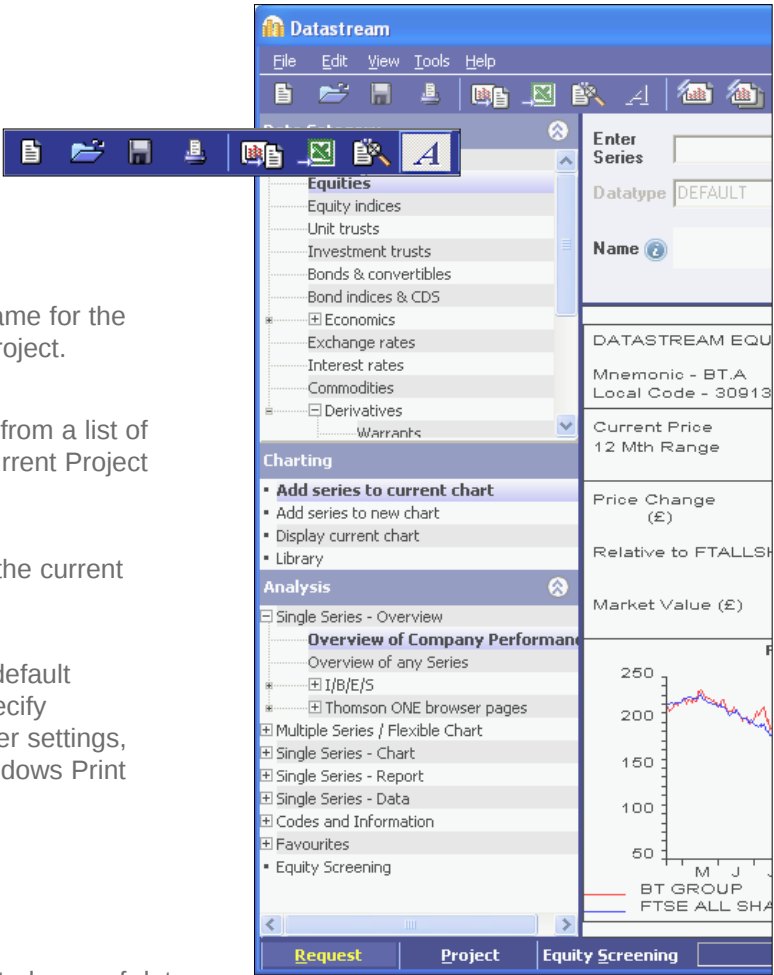
Transfer the data or chart request to Excel, for regular updating in Excel.

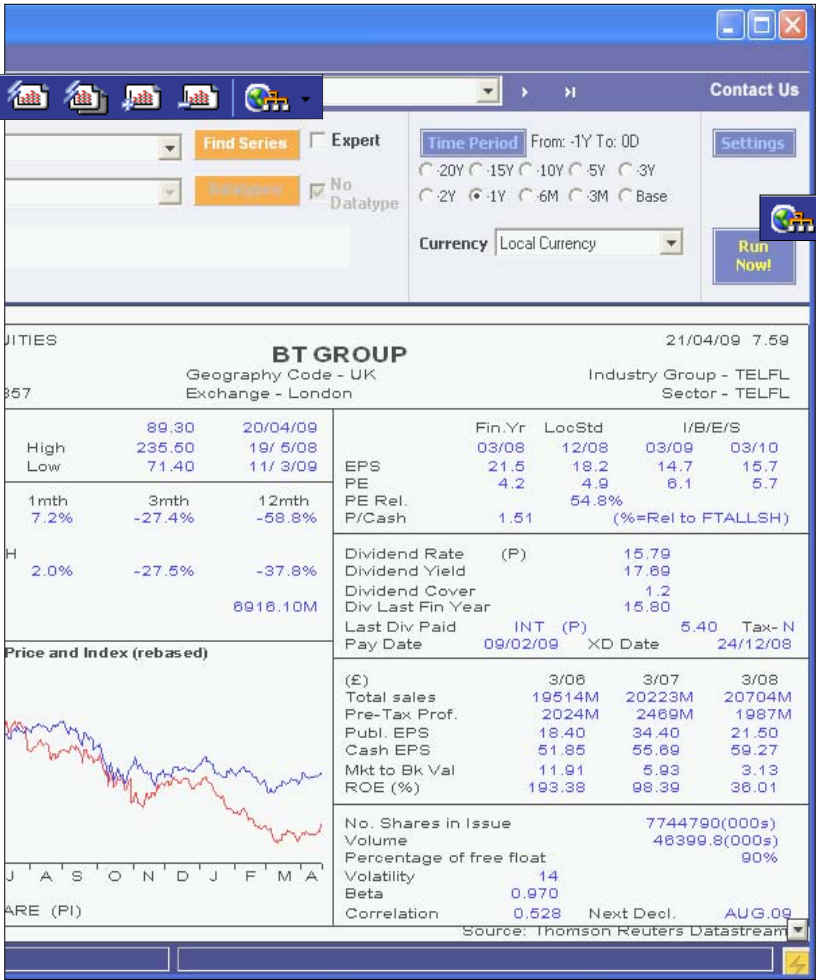


Create, edit, merge, or download lists from Datastream for generating requests.



Display the Annotations tool bar. Click this button again to turn off the Annotations tool bar. Use the Show Annotations option from the View menu to show/hide any annotations added.





Contact Us

Click the Contact Us button to raise a query on Datastream content or functionality.

Datastream Research Extranet - provides access to information to help you get more from Thomson Reuters Datastream - updates on new data, issues with the data, user documentation and sample Excel tearsheets.

Note:

The Extranet is configured in the Datastream options dialog (from the Tools menu) to be displayed in the main window at start up.



Refresh the currently displayed request with the latest Datastream prices or values.



Refresh all requests in the current Project with latest Datastream prices or values.



Add request to Project for Scheduled Night Shift processing. Use the Add New Request button to add any number of requests to a Project so all requests can be processed together when you connect to Datastream.



Delete the displayed request from the current Project.

MAKING A REQUEST

To make chart, report, and data format requests, follow this sequence of steps to select the data you require:

1 Select the type of series you want from the Data Category window - holding the mouse over the data category will display quick links to Navigator.

See Selecting a data category, page 14.

Find and select your series.

- Click the Series navigation button to open Navigator.
 - Check the Expert entry box and type the exact mnemonic or code in the Series field.
- See Selecting the series, page 15.

3 Select a datatype (optional). You can:

- Click the Datatype Navigation button to open Navigator.
- See Datatypes, page 24.

4 Select the type of request.

Select a request type tab. For example, a single chart.
Select the type of chart, report or data format from the list displayed.

See Selecting types of request, page 20.

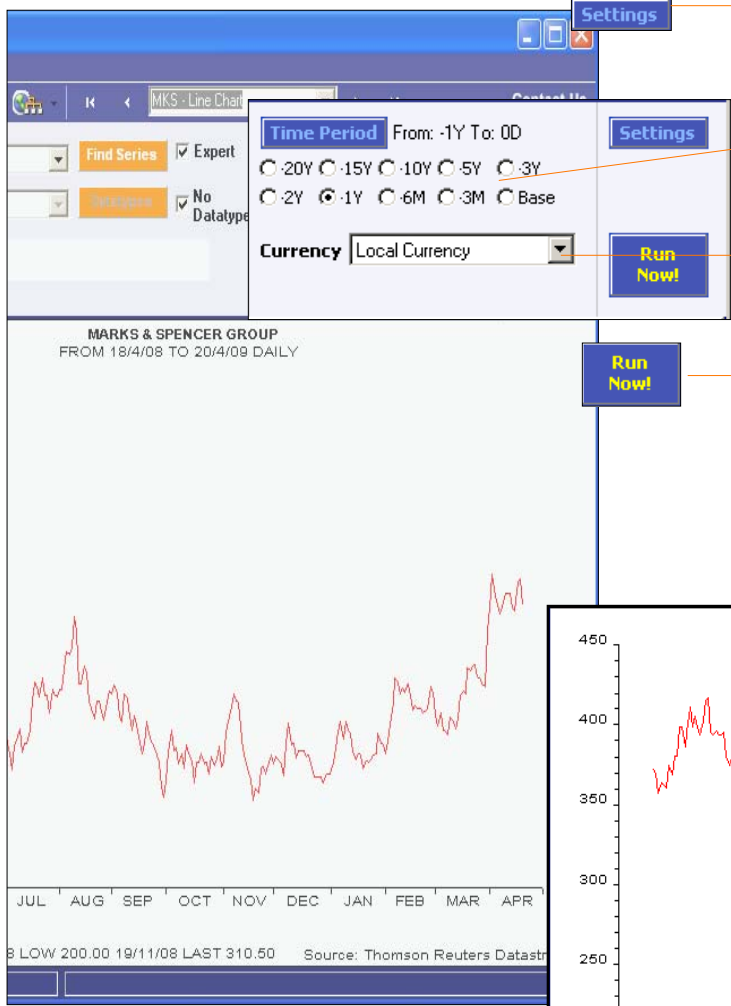


You can also make additional graph layout and data settings for some requests using the **Settings** button. See Settings, Datastream Help.

Refine your request.
Change the display period, select a relative date option or click the **Date** button.
See Dates, page 22.
Change the currency, click the **Currency** drop down box.
See Currency, page 26.

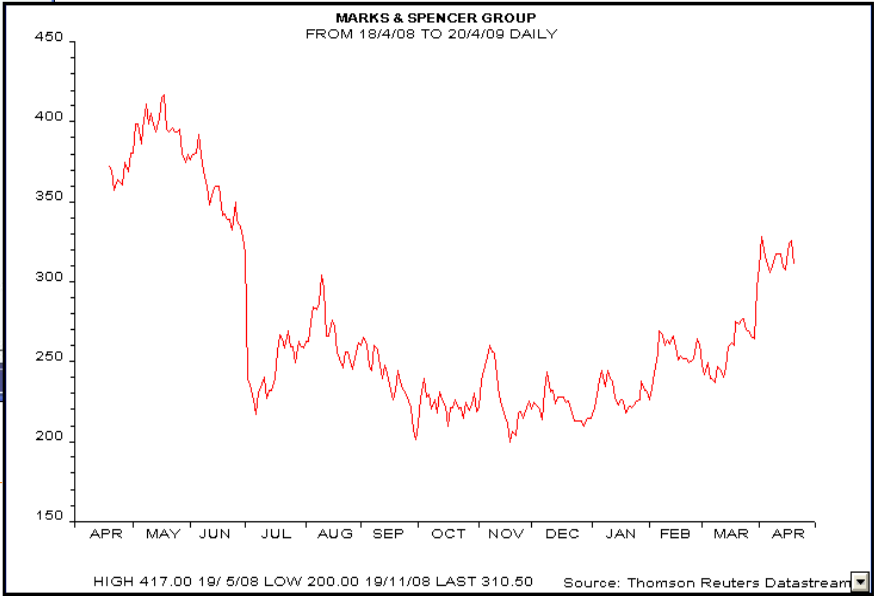
Run your request.
Click the **Run Now** button.
You can create a project and use the Schedule Night Shift Facility to run your project at a later date.
You can save the parameters as a Favourite to save you time setting up the details again.

See Making your request, page 27.



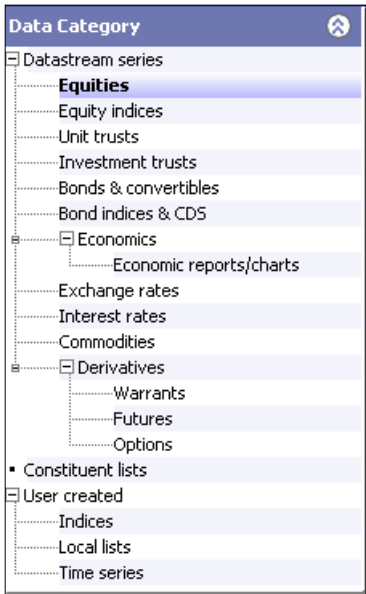
View your results.
You can Print, **Export**, or Copy the results of your request, and for a data request, transfer the data to your spreadsheet for future refreshing within Excel.

To locate the series you want, you can use: the **Find** field, see Using Find, page 16; the Filter, see Using the Filter, page 18; and Equity Search, see the Datastream Help.



SELECTING A DATA CATEGORY

Datastream series codes are stored in a database and are accessed using Datastream Navigator. The series are grouped into 17 data categories, which are selected from the Category drop down list. Selecting a data category gives you access to all the series within that category.



You can select:

- Equities
- Equity indices
- Unit Trusts
- Investment Trusts
- Bonds and convertibles
- Bond indices & CDS
- Economic reports and charts
- Exchange Rates
- Interest Rates
- Commodities
- Warrants
- Futures
- Options
- Constituent lists
- User created Indices
- User created Local lists
- User created Time series

TO SELECT A DATA CATEGORY:

- Click the plus sign to expand the list and select a category from the list displayed.

SELECTING THE SERIES

Use Datastream Navigator to find and select the series you want, or if you know the Datastream mnemonic or code, SEDOL, ISIN, or other Datastream supported code, check the Expert entry check box and type the mnemonic or code in the Series field to select your series.

The screenshot shows a form with the following elements: 'Enter Series' (text input), 'Datatype' (text input), 'Name' (text input with an info icon), 'Find Series' (orange button), 'Datatypes' (orange button), 'Expert' (checkbox), and 'No Datatype' (checkbox). Arrows from the text blocks below point to the 'Enter Series' field, the 'Find Series' button, and the 'Expert' checkbox.

Enter part of the name for the required series
Click the Search button to open the Datastream Navigator.

Click the drop down button to view and select recent 12 series

Expert entry:

Check the **Expert entry** box and type the exact mnemonic or code or Datastream function or expression directly in the **Series** field.

TO SELECT A SERIES:

- Click the **Series navigation** button to find and select your series from Datastream Navigator.
- To view recent series use the drop down to select from the last 12 series used.
- Check the **Expert entry** box and type the mnemonic or code in the **Series** field.

You can also use the Datastream Help Browser.

USING DATASTREAM NAVIGATOR - SERIES SEARCH

Series search is the most basic search. Use this to search by the name, DS mnemonic, DS code, SEDOL, ISIN, local code, or IBES ticker of the series you are looking for. Alternatively you can use the 'Explorer' hierarchies to drill down to the series (or the 'Help browse' pages that provide access to the datatypes available for the series).

TO FIND AND SELECT A SERIES USING SET CRITERIA PAGE:

Click the **Search** button to open **Datastream Navigator**.

Click the **Series Search** button if it is not already selected.

You can add a second criteria of search

Click the **Search** button.

The screenshot shows the Datastream Navigator Series Search interface. On the left, a sidebar lists various categories under 'Equities', including Equity indices, Bonds & convertibles, and Commodities. The main area has tabs for 'Results' and 'Explorer'. Below the tabs are several search criteria fields: 'Contains' (with a dropdown menu), 'Equals' (with a dropdown menu), and 'Before' (with a dropdown menu). The 'Contains' field is currently set to 'Finance', and the 'Equals' field is set to 'France'. The 'Before' field is set to 'Before'. To the right of these fields is a 'Search' button. Below the search fields, there are additional options like 'Reset All C' and 'Search Op'. On the far right, there is a list of series names: 'NAI', 'DS', 'DS', 'BA4', 'SED', 'ISI', 'LOC', 'IBB'.

Select the kind of series you require.

You can narrow down the search by selecting different other criteria like **Market**.

Type the first few characters of the name, mnemonic, or code in the **respective** field.

Click on the series that is required.

You can select related series and get more data on the series using the flyout.

You can export the list to excel using Export to Excel button

THOMSON DATASTREAM NAVIGATOR

Series Search

UCI

UCTS

Help

Browse

Interactive Charting

NAV BUILD:735

CLOSE

HELP

Data Category: Equities

Use copied Explorer reference

Extranet

Back

Set Criteria

Retrieve Results

Explorer

Displayed Results 75

Name contains finance

Name

Market

Base Date

Currency

IBES

MSCI

WS

Primary

AVENIR FINANCE

EU.FINANCE ET IND. (BER)

EU.FINANCE ET INDUSTRY

EUROLAND FINANCE

INTV.& FIN.INVESTI.

MTD FINANCE

STRADIM-ESPACE FIN.

Display Related Constituent Lists

Display Related Equity Indices

Display Related User Created Indices

Explorer

Classifications & Metadata

New chart

Add to chart

Report

France

France

France

France

France

France

France

Jul 31 1998

Oct 13 1999

Mar 7 1997

Jan 18 2005

Apr 18 1989

Jul 24 2008

Jan 19 2000

Euro

Euro

Euro

Euro

Euro

Euro

Euro

Yes

No

No

No

Yes

No

No

No

No

No

No

No

No

No

Yes

Yes

Yes

No

Yes

No

Yes

Yes

No

Yes

Yes

Yes

Yes

Yes

Items 1-7 of 7

Criteria

Retrieve Results

Reset All Criteria

Printable version

The series is displayed in Datastream.

DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5

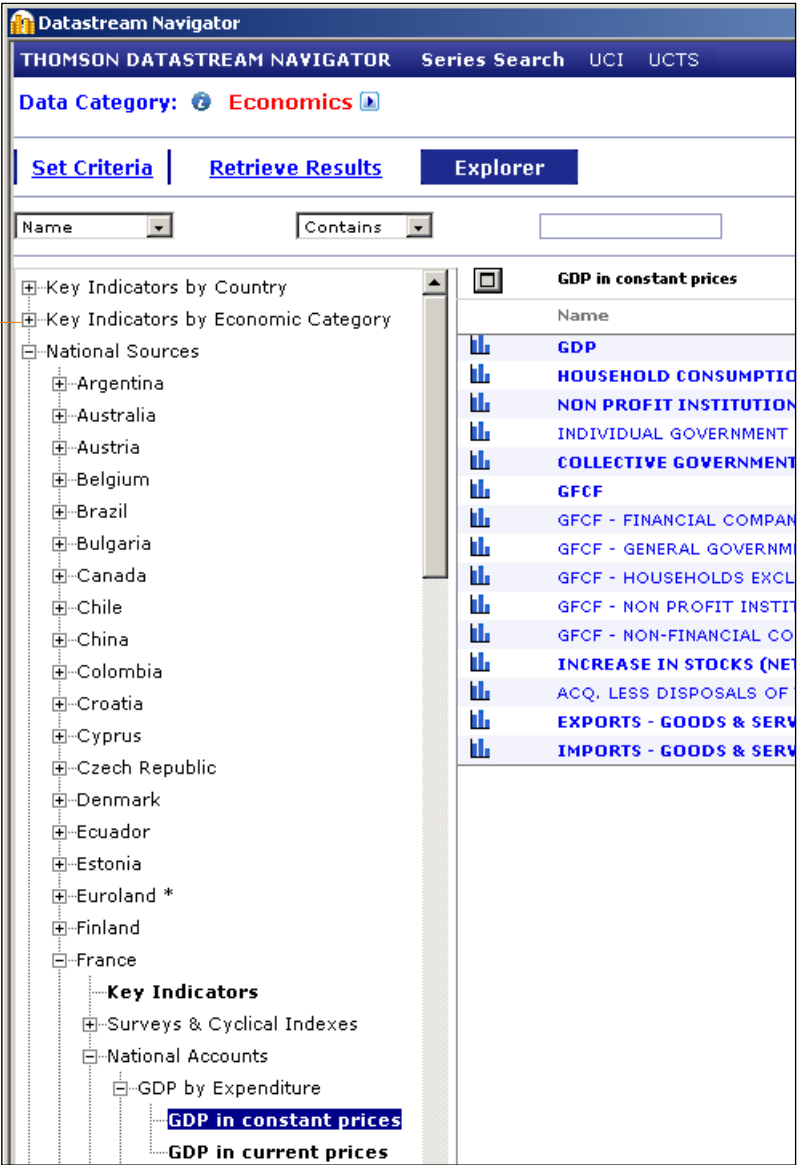
17

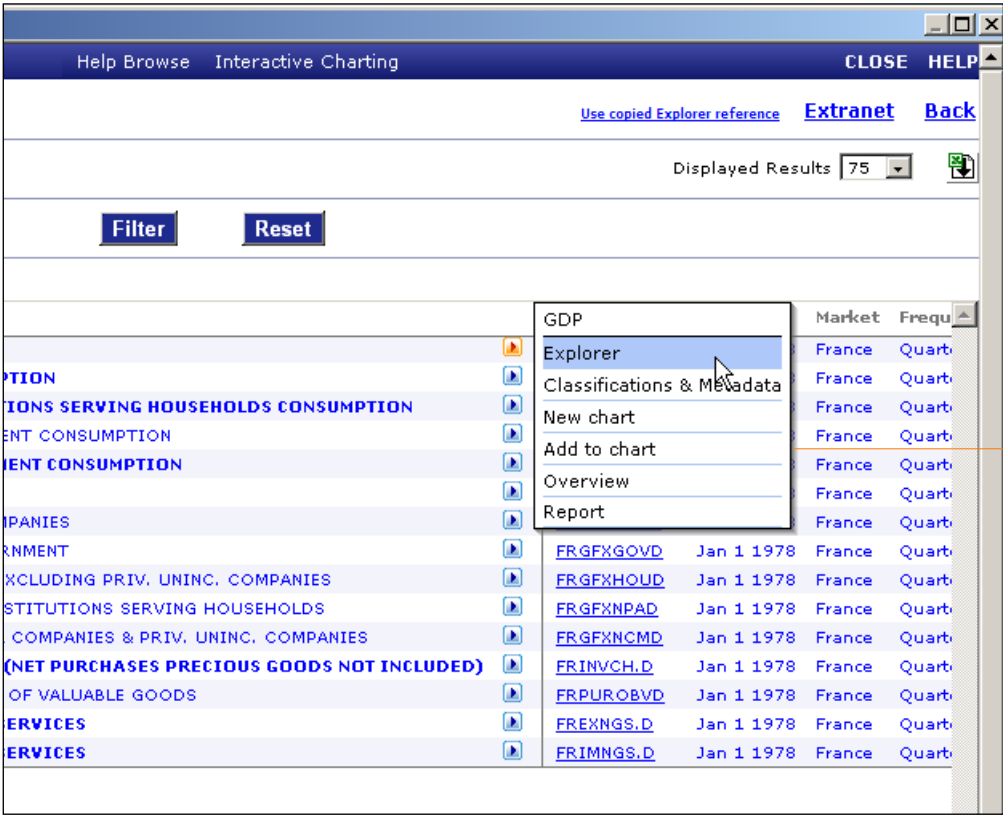
Below example illustrates the steps to use Explorer to find a series.

1
Select
Economics
data category.

Click the plus
sign to
expand the
options

2
Click the Explorer
link





 Flyout button

Move the cursor over the flyout button to obtain the options. Click the Explorer option to know where else in the hierarchies the series is displayed.



SELECTING TYPES OF REQUEST

Datastream gives you access to a wide range of reports, charts, summaries, overviews, and comparison requests.

Over 100 Datastream reports, charts, and data formats are stored in Datastream's database. You can access these by selecting a report/chart type node on the **Request** screen.

Select a request type node to further select the request from the list displayed.

Analysis

Single Series - Overview

Overview of Company Performance

Overview of any Series

I/B/E/S

Thomson ONE browser pages

Multiple Series / Flexible Chart

Single Series - Chart

Single Series - Report

Single Series - Data

Codes and Information

Favourites

Equity Screening

Charts or reports available.

TO SELECT A REQUEST:

- 1 Select a request type node of the tree.
- 2 Select a request from the list displayed.

REQUEST TYPES

Single Series - Overview - You can request Datastream company, commodity, warrant, trust, and bond performance overviews, and a range of fixed format IBES forecast overviews.

Multiple Series / Flexible Chart - You can display information on multiple series, enabling you to create comparisons across different data category types, and use flexible charts for multiple chart requests. For example, you can compare an equity with an index such as the CAC40 and with an economic series such as the RPI.

Single Series - Chart - You can request any of the standard Datastream graphics, including Line, Moving Average, Stochastics, High-Low-Close, Candlesticks, and Bollinger Bands.

Single Series - Report - You can select from a range of pre-formatted report types including Profit & Loss, Dividend & Earnings, Key Accounts Ratio, and Company Profiles.

Single Series - Data - You can download time series, static, and company accounts data, which you can export or transfer to your spreadsheet.

Codes and Information - You can use the Remote Search as an alternative way to find codes for active and dead equities, unit, investment trusts, bonds, warrants and convertibles. There is also an option to set Datastream to run requests and update projects in English, French and German.

Favourites - You can save frequently used projects as **Favourites** so that next time you can run the request quickly.

Equity Screening - search the Datastream global equity universe for companies that match your chosen criteria.

REFINING YOUR REQUEST

DATES

Each data category has a default date range. You can choose your own from four display period options:

- Fixed start and end dates - a fixed period. For example, the whole of last year.
- Relative start and end dates - a fixed period relative to today's date.
- Datastream base date - a period starting with the date of the earliest data available on the database for a series.
- Today - a period ending with the latest available price or value.
Intra-day prices are available for many markets. To receive the latest intra-day price or value, you must subscribe to the intra-day service.

Datastream enables you to combine these start and end date options.

TO SELECT A DATE PERIOD:

Click the **Time Period** button. The **Configure Dates** dialog is displayed.

Relative dates.

Time Period From: -1Y To: 0D
☐ -20Y ☐ -15Y ☐ -10Y ☐ -5Y ☐ -3Y
☐ -2Y ☒ -1Y ☐ -6M ☐ -3M ☐ Base
Currency Local Currency
Settings
Run Now!

Fixed date option.

Relative date option.

Base date option.
Displays data from the earliest date that data is available.

Configure Dates

Start Date

☐ Fixed 22/10/2001
☐ Show as Year

☒ Relative 1 Year
☒ Before Today ☐ After Today

☐ Datastream Base Date -4 Year Ends: (Company Account Reports Only)

End Date

☐ Fixed 22/10/2002
☐ Show as Year

☒ Relative 0 Day
☒ Before Today ☐ After Today

☐ Today 0 Year Ends: (Company Account Reports Only)

OK Cancel Help

Year ends - to request the number of year ends for company accounts reports and data.

Today's date option.
(To receive the latest intra-day price or value, you must subscribe to the intra-day service)

Select the date options.

2

Fixed date option

Use the spin buttons to select a date.

Click the **Calendar** button to display an interactive calendar.

Type a date.

Relative date option

To select both start and end periods before today.

Use the spin buttons to select a date.

To select both start and end dates after today, for projected series.

To specify year ends for Company Accounts Report only.

Select day, week, month, quarter or year.

October						2002
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Click OK.

3

DATATYPES

The datatype defines the type of data. For example, the default datatype for equities is Price (Adjusted).

For some data categories and report/chart types, you can select the datatype. For example, for an Equity line chart request you can change from the default Price (Adjusted) datatype to Market Value.

When the Datatype navigation button is enabled, click to display the datatypes available for your data category.

Datatypes are grouped by their type; for example, Datastream IBES datatypes, MSCI datatypes, and Worldscope data items.

To select a datatype:

Click the **Datatype navigation** button. **Datastream Navigator** is displayed.

Datatype navigation button.

Check this box if default datatype is required.

Datatype

Datatypes

☐ No Datatype

Select **Name** or **Mnemonic** from the **find** drop down box.

1

2

3

THOMSON DATASTREAM NAVIGATOR

Datatype Search

Interactive Charting

Data Category: Equities

Find

Name

Contains

Starts With

Equals

Starts With

Contains

Does Not Contain

Name

Contains

Filter / S

Datatype

Category

Series

Key

Worldscope Level

All

Company

Security

Worldscope Report Type

All

Key

Datastream

FTSE AW

GICS Direct

IBES

MSCI

Russell

STOXX

Worldscope

12 Month Forward BPS Book Value Per Share

12 month forward CAP Capital Expenditure

12 Month Forward CPS Cash Flow Per Share

12 Month Forward CSH Cash Earnings Per Share

12 Month Forward DPS Dividend Per Share

12 Month Forward DPS Dividend Per Share

12 Month Forward EBD EBITDA

12 Month Forward EBT EBIT

12 Month Forward EPS Earnings Per Share

12 Month Forward EVT Enterprise Value

12 Month Forward FFO Funds From Operations

12 Month Forward Forecast EBG Earnings Before Goodwill

12 Month Forward GPS GAAP Per Share

12 Month Forward GRM Gross Margin

12 Month Forward NAV Net Asset Value

WTIDY

B1FD12

K1FD12

C1FD12

Y1FD12

D1FD12

Y1FD12

T1FD12

X1FD12

F1FD12

Z1FD12

U1FD12

G1FD12

H1FD12

M1FD12

V1FD12

Select **Equals** **Starts With** or **Contains** from the drop down box.

5 Select the type of datatype, **Static** or **Time Series**.

4 Type the search criteria.

7 Click the **Filter / Search** button.

Datastream Navigator

THOMSON DATASTREAM NAVIGATOR Datatype Search Interactive NAV BUILD:792 CLOSE

Data Category: **Equities** Displayed Results 75

Find Name Contains Market Value And Name Contains **Filter / Search** **Filter / Search**

Datatype ☒ All ☐ Static ☐ Time Series Play WS Item ☐ All ☐ No ☐ Yes Worldscope Level ☒ All ☐ Company ☐ Security Worldscope Report Type Annual

Name	Mnemonic	World
FTSE Market Value In US (Excludes Weighting Factor)	FTSMVUSU	
FTSE Market Value In US (Includes Weighting Factor)	FTSMVUSD	
FTSE Market Value In US After Applying The Growth Factor	FTSMVUSG	
FTSE Market Value In US After Applying The Value Factor	FTSMVUSV	
FTSE Market Value-Local Currency	FTSMV	
Market Value (Capital)	MV	
Market Value Based On Free Float	FMVIDX	
Market Value For Company	MVC	
Market Value Of Constituent Within Index	MVIDX	
Market Value-Local Currency-Search Only	X(FTSMV)	
MSCI Initial Full Market Value (Local)	MSLMV	
MSCI Initial Full Market Value (USD)	MSIFMV	
MSCI Initial Full Market Value Next Day (Local)	MSNLMV	
MSCI Initial Full Market Value Next Day (USD)	MSNIMV	
MSCI Market Value	MSMV	
MSCI Market Value (US Dollar)	MSVUSD	
MSCI Market Value - Small Cap Local	MSSMV	
MSCI Market Value - Small Cap US (MSCI)	MSZUSD	
MSCI Market Value In Different Currencies	MSVxxx	
MSCI Provisional Market Value In Other Currencies	MSWxxx	
MSCI Small Cap Market Value In Other Currencies	MSZxxx	
STOXX Market Value Euro	STXMV	
STOXX Market Value US Dollar	STXMVUSD	

Datatype Definition:

To view the definition for a particular Datatype simply select the  image and the definition will be displayed here

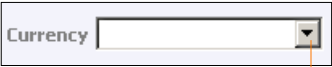
6 Select the group of datatypes to select from.

8 Check the Navigator definition to ensure that the correct datatype has been selected

9 Select the datatype from the list displayed. The datatype is displayed in Datastream.

CURRENCY

You can select which currency you want to display your results in.



Click the **Currency** drop down list and select a currency from the list displayed.

Note:

The parameters that you can change are dependent on the data category and chart, report, or data format chosen. For example, you can change the date, datatype, and currency for an Equity - Line Chart request, but only the date for a Constituent - Bar Chart request. If you cannot change the currency, the currency option is greyed out.

MAKING YOUR REQUEST

Once you have selected the criteria for your request and made your display date, datatype, and currency adjustments, you can make your request:

Run Now:

Request the report, chart, or data straight away.



This connects you to Datastream and displays the result. You can change the request criteria and click the button again, or save the request for future use.

Note -

Double clicking on the request in the Explorer hierarchy will also run the request.

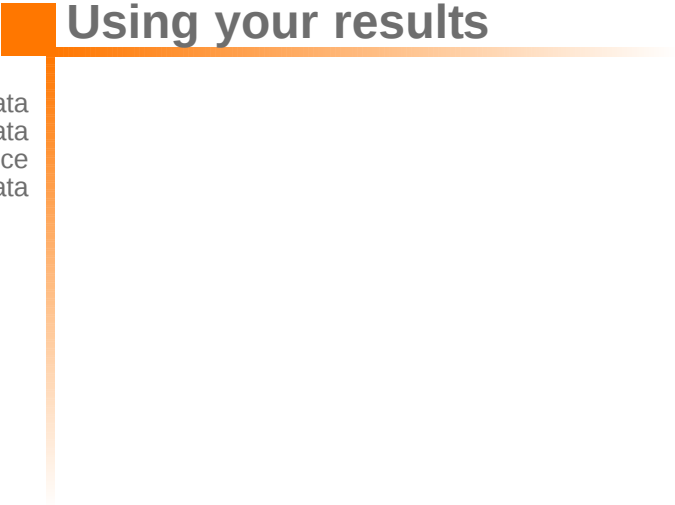


Add New Request:

Add the request to the open Project to refresh later.

This does not connect you to Datastream, but stores the request in the open Project. This enables you to work off line and send all your requests at the time of your choice.

Please see *Using Projects, Datastream Help*.

An orange square is positioned to the left of the section header. A horizontal orange line extends from the right side of the square, and a vertical orange line extends downwards from the bottom of the square.

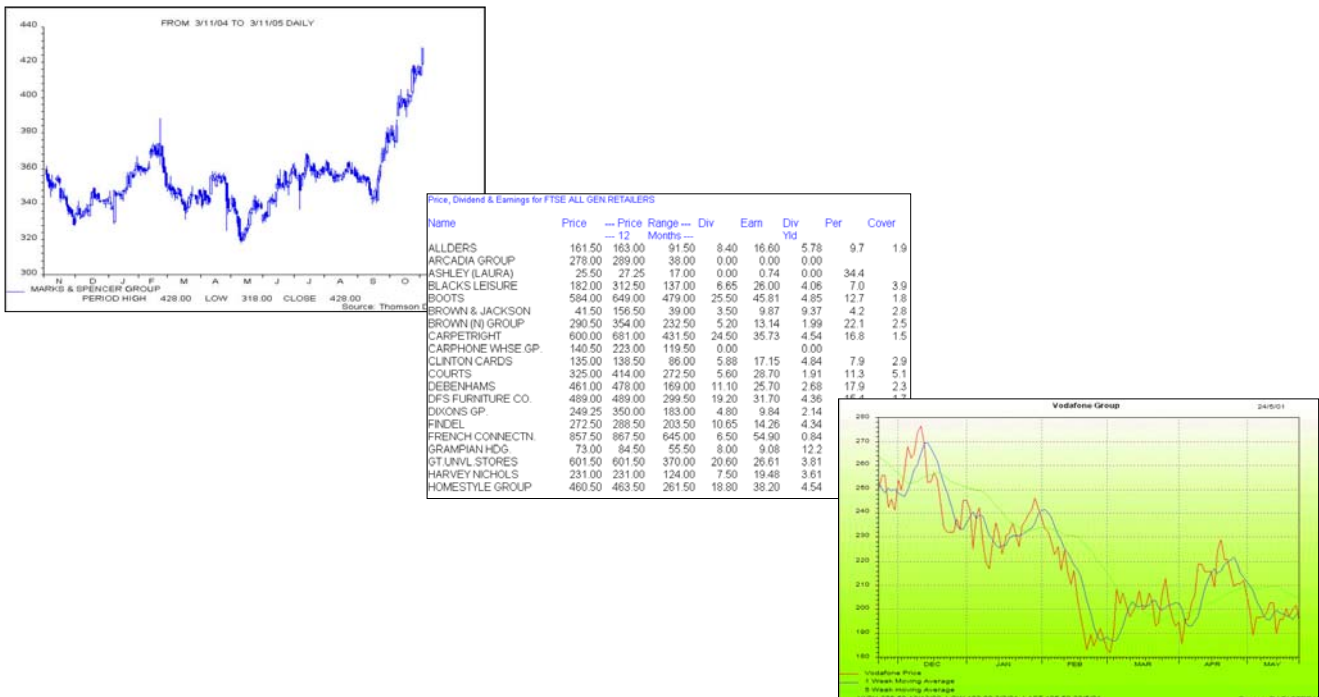
Using your results

- Printing reports, charts, and data
- Copying reports, charts, and data
- Transferring charts to MS Office
- Exporting charts, reports, and data

■ Using your results

When you request reports, charts, and data formats from Datastream, they are displayed within Datastream and are automatically added to the current open Project. You can:

- Print your charts and selected pages of reports through any Windows printer.
- Copy reports, charts, and data formats to the Windows clipboard for further use in Windows applications.
- Export reports, charts, and data in a variety of formats for use with other applications such as word processors.
- Transfer data to Microsoft Excel. Data downloaded from Datastream can be transferred to spreadsheet for regular updating.
- Transfer charts to Microsoft Office applications like Excel, Word, and PowerPoint. You can transfer your chart requests directly into these applications as embedded, dynamic objects. Once embedded, the requests can be refreshed, and within Excel and PowerPoint - you can right click on the chart to re-edit the chart in Datastream - then transfer it back, with any edits, to Excel and PowerPoint.



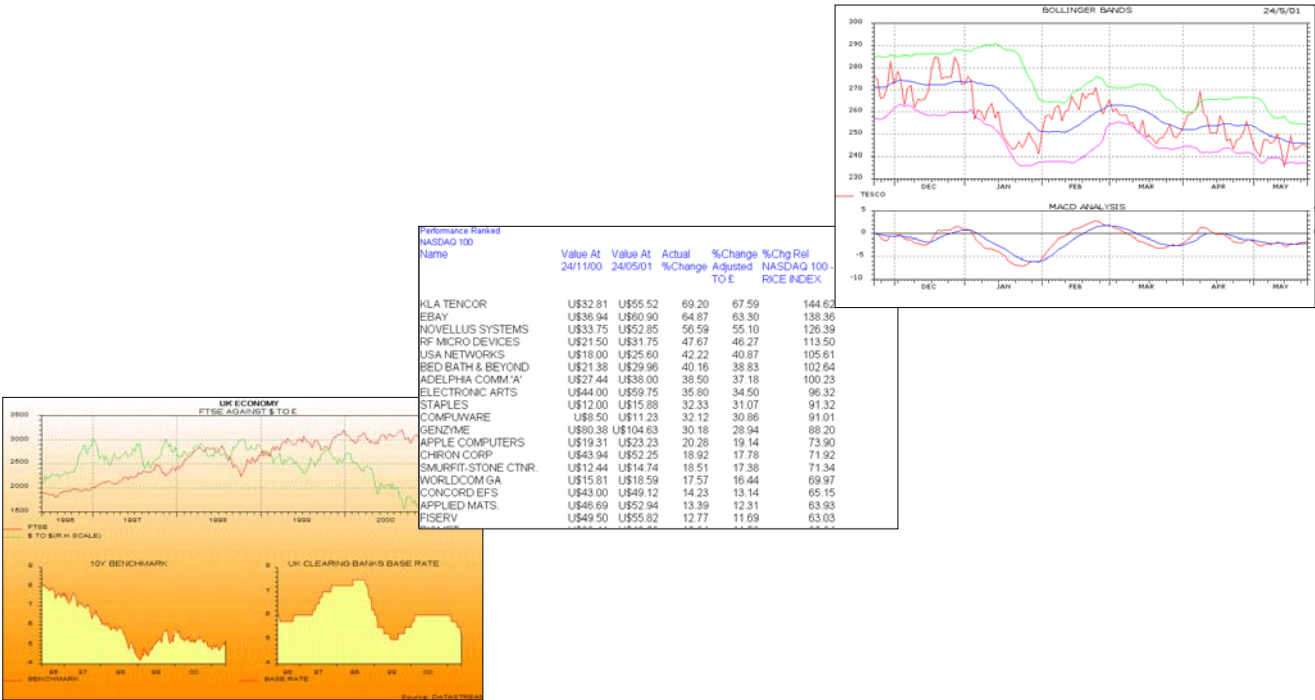
PRINTING REPORTS, CHARTS, AND DATA

You can print any displayed report, chart, or data format through the default Windows printer, (in addition you can print a set of charts with several charts on page using the Print Project (Chart Layout) option).

To print your report, chart, or data:

- Select **Print** from the **File** menu, OR
click the **Print Current Request** button  to print the request displayed.

To change the printer or printer settings, select **Print Setup** for either Report or Chart from the **File** menu.



COPYING REPORTS, CHARTS, AND DATA

You can copy the displayed report, chart, or data format to the clipboard and paste it into other Windows applications.

TO COPY A REPORT:



- 1 Select the area to be copied; this can be:
 - A range of cells - click the left mouse button and drag the cursor over the display area to define the cell area to be copied.
 - The whole report (default) - the whole report is selected automatically when it is displayed.
- 2 Select **Copy** from the **Edit** menu.

Note:

The report text will be held on the clipboard in text format with TAB formatting, but without font and text formatting.

TO COPY A CHART:

- Select **Copy** from the **Edit** menu.

Note:

The chart will be held on the clipboard as a Windows Meta File.

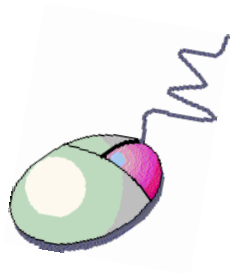
TO COPY DATA:



- 1 Select the area to be copied; this can be:
 - A range of cells - click the left mouse button and drag the cursor over the displayed spreadsheet to define the cell area to be copied to the clipboard.
 - All the data (default) - the whole data request is selected automatically when it is displayed.
- 2 Select **Copy** from the **Edit** menu.

Note:

The data selected will be held on the clipboard in text format with TAB delimiting for direct pasting into a spreadsheet or word processor.



You can use the right click menu to copy.

TRANSFERRING CHARTS TO MS OFFICE

Chart requests can be transferred directly into Excel, Word, and PowerPoint as refreshable objects.

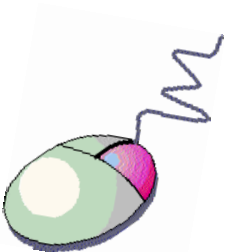
TO TRANSFER A CHART REQUEST TO MS OFFICE:



- 1** Select **Transfer to Excel** (Word, PowerPoint) from the **Tools** menu. Excel (Word, PowerPoint) is opened with a new worksheet (document, slide). Your chart is displayed.
- 2** You can display the chart:
 - as a single element
 - OR**
 - as an Office Picture - right click and select **Display as Office Picture**. This gives you the Office Picture format options.

Note:

To display the chart as transparent, right click over the Refresh button and de-select Display original background (the chart format must be as an Office Picture). To re-edit a chart once transferred to Excel or PowerPoint - right click on the chart and select the Edit Chart option.



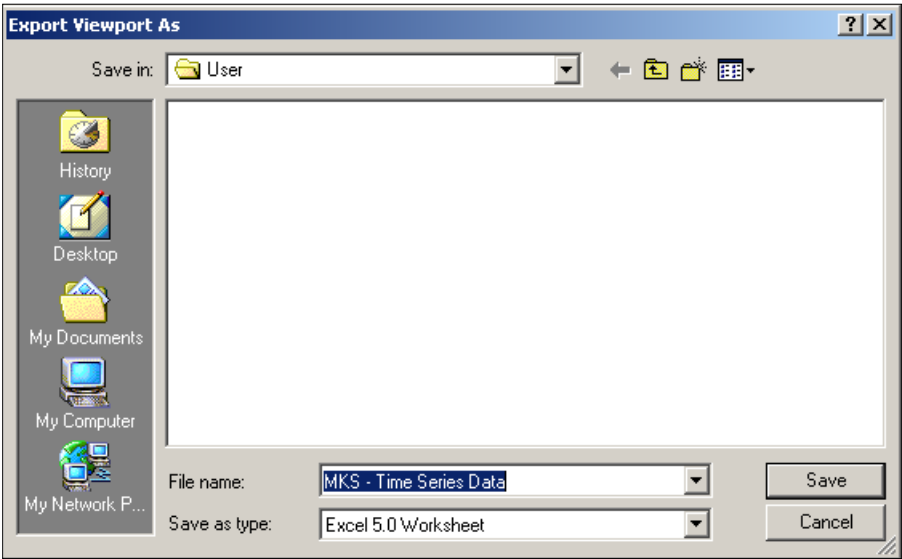
You can use the right click menu to transfer and export.

EXPORTING CHARTS, REPORTS, AND DATA

You can export the displayed report, chart, or data as a file in a format suitable for use with other software packages. The default formats are: .XLS (Excel spreadsheet) for reports and data, and .WMF (Windows meta-file) for charts.

TO EXPORT A CHART, REPORT, OR DATA:

- 1 Select Export from the Tools menu.
The **Export Viewport As** dialog is displayed.



- 2 Select the export details:
 - Type an export file name
 - Select a drive or a server destination
 - Select an export format
- 3 Click **OK**.

Using Datastream Advance for Office

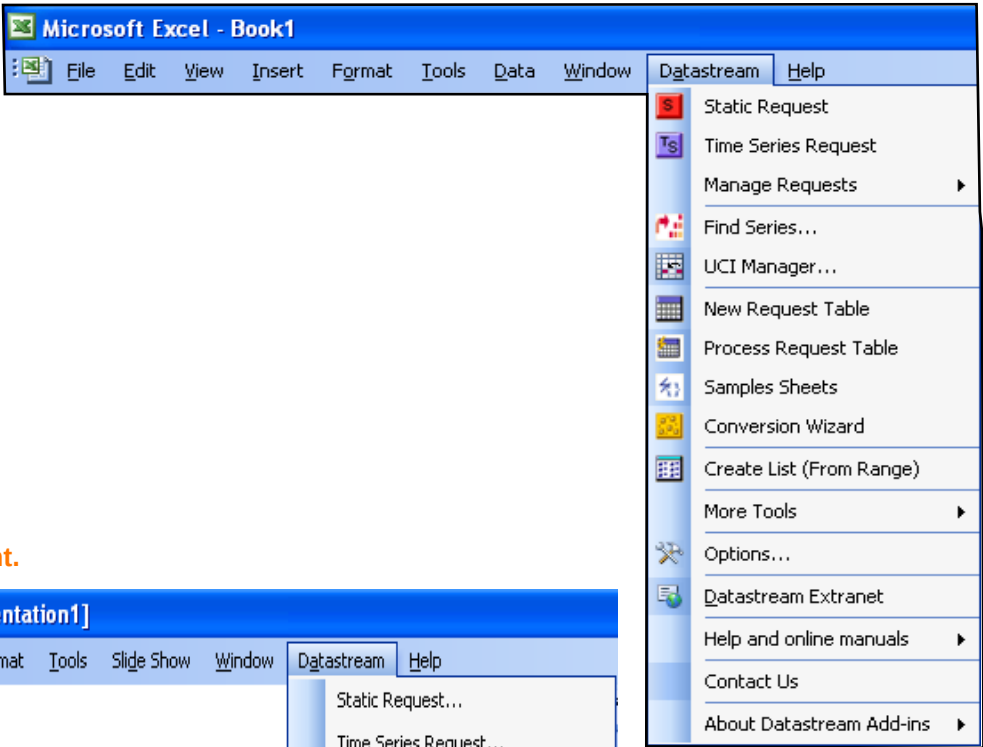


The Datastream Advance for Office (AFO) interface
Making a static request
Making a time series request
Using the Request Manager

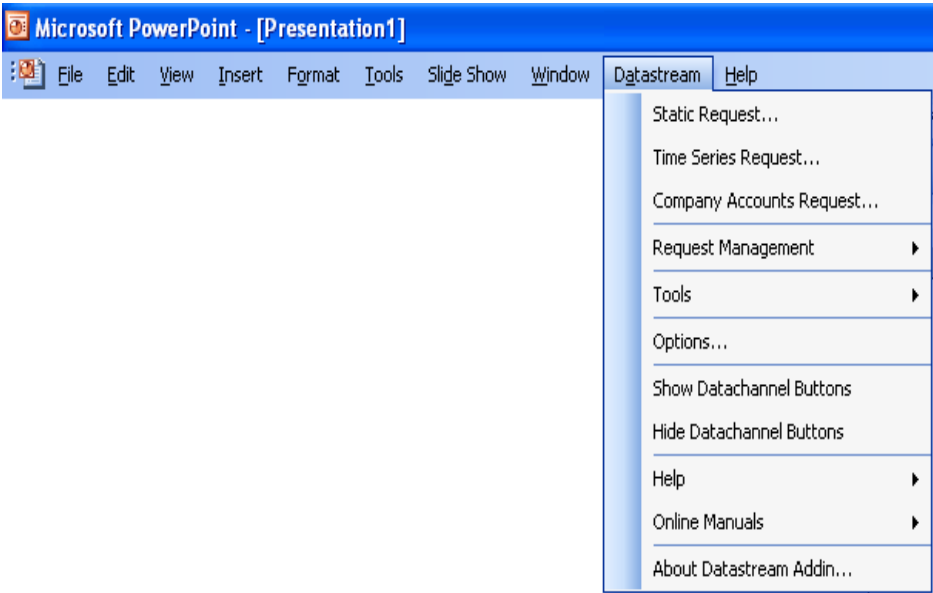
THE DATASTREAM ADVANCE FOR OFFICE (AFO) INTERFACE

To use Advance for Office, use the **Datastream** menu in your Office application.

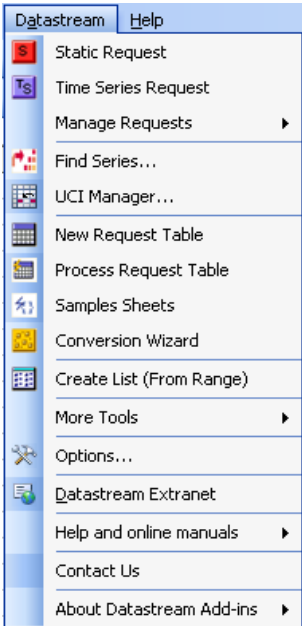
AFO menu in Excel.



AFO menu in PowerPoint.



USING DATASTREAM ADVANCE FOR OFFICE



In AFO you can make static, time series, and company accounts requests.

Static requests

To request data for a specific date.

For example, the price, PE and dividend yield for Pepsico and Coca-Cola for 01/01/05

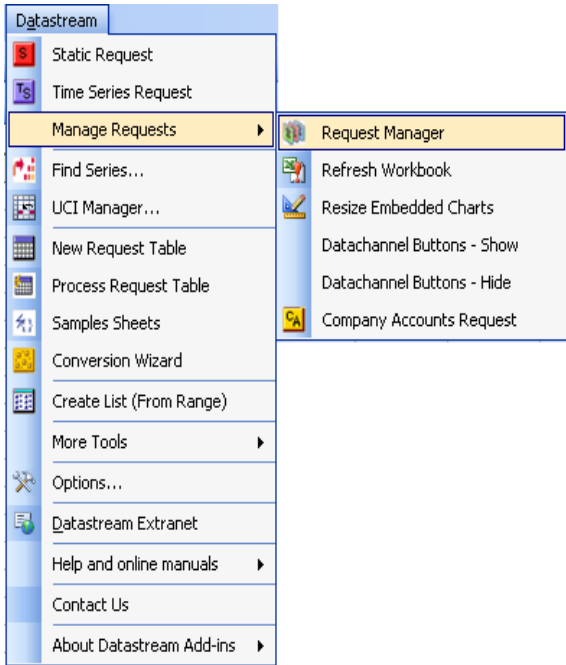
Refresh	12/31/2004					
Type	P	PE	DY	CURRENCY		
U:PEP	52.2	21.9	1.76	U\$		
U:KO	41.64	22.1	2.4	U\$		

Time series requests

To request data over a specific period, defined by a start date, end date, and frequency of data.

Refresh	12/31/2004					
End	12/30/2005					
Frequency	D					
Name	Code	CURRENCY\	12/31/2004	1/3/2005	1/4/2005	1/5/2005
PEPSICO	U:PEP(P)	U\$	52.2	51.94	51.57	51.63

For example, the daily price for Pepsico from 01/01/05 to 01/01/06



Note:

Since the replacement of Datastream company accounts with the normalised Worldscope fundamentals database - fundamentals data can now be retrieved using Static and Time Series requests.

Request Manager

Use the Request Manager to manage your embedded requests. All the chart and data requests in your Excel work book are listed with their details. You can edit, delete, or refresh the requests individually or together.

MAKING A STATIC REQUEST

Select **Static Request** from the **AFO** menu.

Select the **Editor** button to edit multiple series (or expressions)

Select the series.
Click the **Series navigation** button to display **Datastream Navigator**.

Select the **Fx** button for immediate access to the Datastream functions.

You can also select lists of series, and expressions.

The series chosen is displayed in the **Series** field.

Select the series you want from the list. See Selecting the series, page 15.

Static Request

Request Details

Series/Lists

U:PEP

☐ Display Data As MSChart

DS,JSIN etc.

T1 Code

Datatypes/Expressions

Fx

MV

\$

Date

Latest Value

Options

☐ Display Custom Header

☒ Display Row Titles

☒ Display Column Titles

☐ Display Headings

☒ Transpose Data

☐ Display Code

☐ Display Currency

Display Expression

Description

Number

Display DataType

Description

Memoronic

☒ Embed

☒ Auto Refresh

☒ Visible button

Datastream Navigator

THOMSON DATASTREAM NAVIGATOR

Series Search

UCI

UCTS

Help

Browse

Inter

Data Category: Equities

Extrane

Set Criteria

Retrieve Results

Explorer

Search

Name

Contains

PEPSICO

Datastream Navigator

THOMSON DATASTREAM NAVIGATOR

Series Search

UCI

UCTS

Help

Browse

Inter

Data Category: Equities

Extra

Set Criteria

Retrieve Results

Explorer

Name c

Name	DS Mnemonic	DS Code	Market	Base Date	Currency
PEPSICO	U:PEP	905677	United States	Jan 2 1973	United States Dollar
PEPSICO (AMS)	H:PEP	993313	United States	Mar 9 1981	United States Dollar

Select the datatype.
Click the **Datatype navigation** button to display **Datastream Navigator**.

Static Request

Request Details

Series/Lists U-PEP

☐ Display Data As MSChart

☒ DS, ISIN etc.

☐ T1 Code

Datatypes/Expressions MV

Date Latest Value

Options

☐ Display Custom Header

☒ Display Row Titles

☒ Display Column Titles

☐ Display Headings

☒ Transpose Data

☐ Display Code

☐ Display Currency

☐ Display Latest Value First

☒ Hyperlink to Series Metadata

☐ Hyperlink to Datatype Definition

Display Expression

☒ Description

☐ Number

Display Datatype

☒ Description

☐ Mnemonic

☒ Embed

☒ Auto Refresh

☒ Visible button

Find Series

Datatypes

Currency option helps you to choose the currency

The datatypes chosen are displayed in the **Datatype** field.

Select the datatype you want from the list. See Datatypes, page 24.

Datastream Navigator

THOMSON DATASTREAM NAVIGATOR Datatype Search My Selections Interactive Charting NAVI

Data Category: Equities

Displayed Results

Find Name Contains And Name Contains

All

Key Datatypes

Datastream

Time Series

Pricing

Earnings

Dividends

Number of Sh

Market Value (Capital)

Mnemonic Datatype

MV

Time Series

Key

Datatype Definition

To view the definition of a particular Datatype, select the Datatype and click the image.

Select the date.
Type the date of the data you want in the **Date** field in the format mm/dd/yy, or as a relative date from today.

For example, -6m for 6 months ago from today.

Select the display options.

The screenshot shows the 'Static Request' dialog box. The 'Request Details' section includes 'Series/Lists' (U:PEP), 'Display Data As MSChart' (unchecked), 'Datatypes/Expressions' (MV), and 'Date' (Latest Value). The 'Options' section contains checkboxes for 'Display Custom Header', 'Display Row Titles', 'Display Column Titles', 'Display Headings', 'Transpose Data', 'Display Code', 'Display Currency', 'Display Latest Value First', 'Hyperlink to Series Metadata', and 'Hyperlink to Datatype Definition'. The 'Display Expression' section has 'Description' selected. The 'Display Data Type' section has 'Description' selected. The 'Embed' section has 'Embed', 'Auto Refresh', and 'Visible button' all checked. There are 'Find Series' and 'Datatypes' buttons on the right, and 'Submit' and 'Cancel' buttons at the bottom right.

Row Titles

Displays the series code at the left of each series.

Column Titles

Displays the datatype mnemonic or expression at the top of the column for each datatype.

Headings

Displays a general heading for row and column headings. For example, the date of the request.

Currency

Displays the traded currency for each selected series.

Expression

Display the expression description or number.

Transpose

Displays the series data in rows instead of columns.

Display Thomson ONE code

Displays the Thomson ONE code for the series selected.

Embed

The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

Auto Refresh

Refreshes the request automatically when you open the spreadsheet.

Visible button

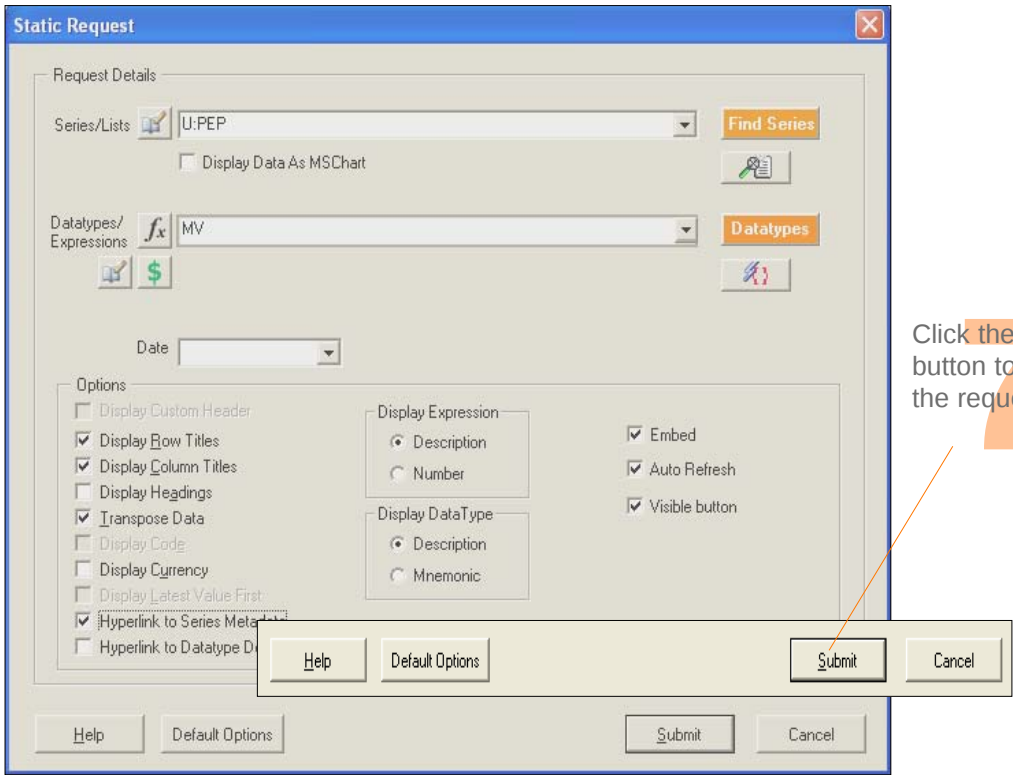
Displays the **Refresh** button with the request results. You can use the **Request Manager** to refresh requests, see page 49.

Series Metadata

Adds a hyperlink to the series code to link to the classifications and metadata pages from Navigator for the series (also enable series that are now dead or inactive to be identified in your workbook).

Hyperlink to Datatype Definition

Add links to the datatype to display the definition from Navigator.



The values for the datatypes selected are displayed for the date selected.

A	B	C	D	E
Refresh				
Type	MV	T1 CODE	CURRENCY	
U:PEP	98224.25	PEP-US	U\$	

To refresh the request, click on the **Refresh** button.
To edit the request, right click on the button and select the Edit option

MAKING A TIME SERIES REQUEST

Select **Time Series Request** from the **AFO** menu.

Select the series.
Click the **Series navigation** button to display **Datastream Navigator**.

You can also select lists of series and expressions.

Time Series Request

Request Details

Series/Lists

U:PEP

Display Data As MSChart

TS for each item in list

DSJSIN etc.

T1 Code

Datatypes/Expressions

MV

Start Date

-2Y

End Date

Frequency

Daily

Display Custom Header

Edit..

Display Expression

1st Series

Description

Display Row Titles

Embed

Display Column Titles

Auto Refresh

Display Headings

Visible Button

Transpose Data

Display DataType

Description

Mnemonic

Display Code

Display Currency

Display Select Value First

The series chosen is displayed in the **Series** field.

Select the series you want from the list. See *Selecting the series*, page 15.

THOMSON DATASTREAM NAVIGATOR

Series Search

UCI

UCTS

Help

Browse

Interact

Data Category:

Equities

Extrane

Set Criteria

Retrieve Results

Explorer

Search

Name

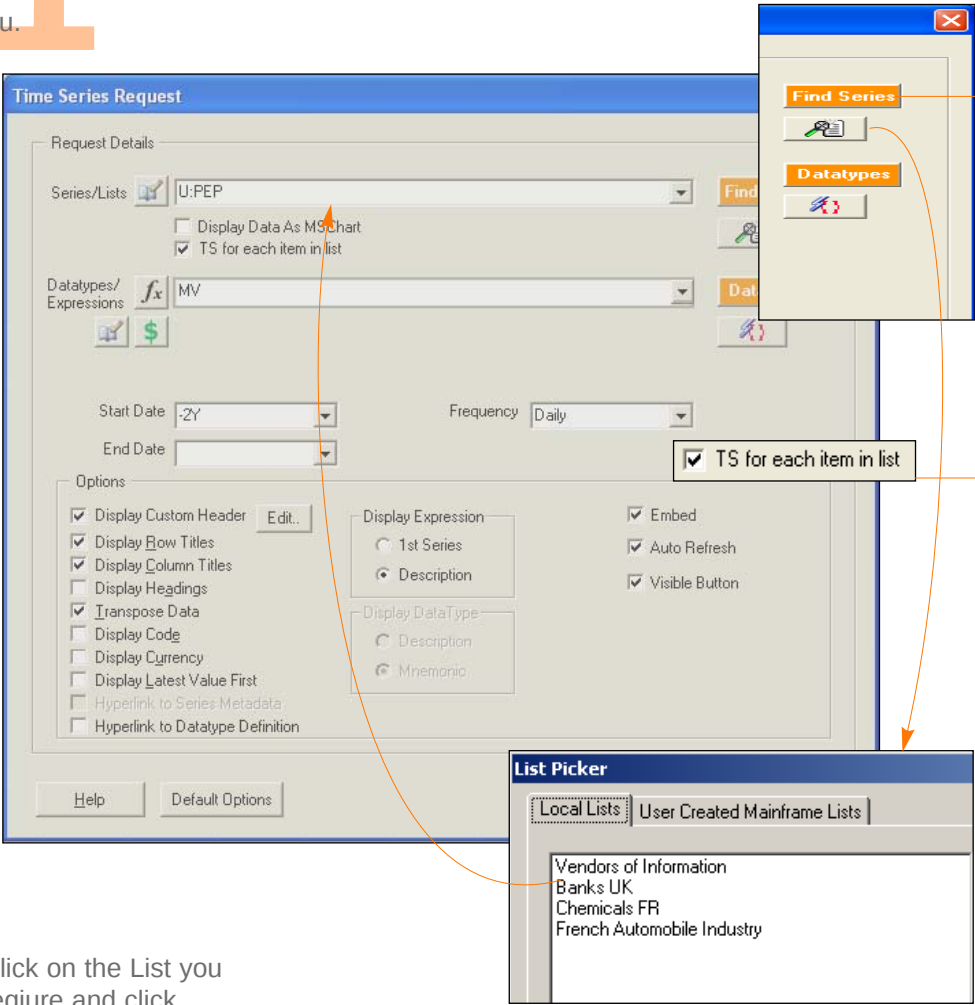
Contains

PEPSICO

THOMSON DATASTREAM NAVIGATOR					
Series Search					
UCI					
UCTS					
Help					
Browse					
Interact					
Data Category: Equities Extrane					
Set Criteria Retrieve Results Explorer Search					
Name					
Contains					
PEPSICO					
Name					
DS Mnemonic					
DS Code					
Market					
Base Date					
Currency					
PEPSICO	U:PEP	905677	United States	Jan 2 1973	United States Dollar
PEPSICO (AMS)	H:PEP	993313	United States	Mar 9 1981	United States Dollar

Or to display time series for a list of series

Select **Time Series Request** from the **AFO** menu.



Click on the List you require and click **OK**.

Select the datatype.
Click the **Datatype** navigation button to display **Datastream Navigator**.

Time Series Request

Request Details

Series/Lists U:PEP

☐ Display Data As MSChart ☒ DS,JSIN etc.
☐ TS for each item in list ☐ T1 Code

Datatypes/Expressions **MV**

Start Date -2Y Frequency Daily

End Date

Find Series

Datatypes

Currency option helps you to choose the currency

The datatype chosen is displayed in the **Datatype** field.

Select the datatype you want from the list. See Datatypes, page 24.

Start Date -2Y Frequency Daily

End Date

Options

☒ Display Custom Header ☒ Display Row Titles ☒ Display Column Titles ☐ Display Headings ☒ Transpose Data ☐ Display Code ☐ Display Currency ☐ Display Latest Value First ☐ Hyperlink to Series Metadata ☐ Hyperlink to Datatype Definition

Display Expression

☐ 1st Series ☒ Description

Display Datatype

☐ Description ☒ Mnemonic

☒ Embed ☒ Auto Refresh ☒ Visible Button

Datastream Navigator

THOMSON DATASTREAM NAVIGATOR Datatype Search Interactive Charting

Data Category: **Equities**

Find Name Contains Market Value And Name Contains

Datatype ☒ All ☐ Static ☐ Time Series Key WS Item ☒ All ☐ No ☐ Yes Worldscope Level ☒ All ☐ Company ☐ Security Worldscope

All	Name	Mnemonic	Worldscope
▶ Key Datatypes			
▶ Datastream			
▶ FTSE AW			
▶ GICS Direct			
IBES			
▶ MSCI			
▶ Russell			
▶ STOXX			
Worldscope			
	FTSE Market Value In US (Excludes Weighting Factor)	FTSMVUSU	
	FTSE Market Value In US (Includes Weighting Factor)	FTSMVUSD	
	FTSE Market Value In US After Applying The Growth Factor	FTSMVUSG	
	FTSE Market Value In US After Applying The Value Factor	FTSMVUSV	
	FTSE Market Value-Local Currency	FTSMV	
	Market Value (Capital)	MV	
	Market Value Based On Free Float	FMVIDX	
	Market Value For Company	MVC	

Select the date.
Type the date of the data you want in the **Date** field in the format dd/mm/yy, or as a relative date from today. For example, -2Y for 2 years ago from today.

Time Series Request

Request Details

Series/Lists: U:PEP

☐ Display Data As MSChart ☒ DS,JSIN etc. ☐ T1 Code

☐ TS for each item in list

Datatypes/Expressions: MV

Start Date: -2Y Frequency: Daily

End Date: Intraday Value

Options

☒ Display Custom Header

☒ Display Row Titles

☒ Display Column Titles

☐ Display Headings

☒ Transpose Data

☐ Display Code

☐ Display Currency

☐ Display Latest Value First

☐ Hyperlink to Series Metadata

☐ Hyperlink to Datatype Definition

Display Expression

☐ 1st Series ☒ Description

Display Data Type

☐ Description ☒ Mnemonic

Embed

☒ Embed ☒ Auto Refresh ☒ Visible Button

Find Series **Datatypes**

Select the display options.

Custom headers

A set of static datatypes can be selected to display as the column headings

Row Titles

Displays the series code at the left of each series.

Column Titles

Displays the datatype mnemonic or expression at the top of the column for each datatype.

Headings

Displays a general heading for row and column headings. For example, the date of the request.

Currency

Displays the traded currency for each selected series.

Expression

Display the first series mnemonic or description.

Transpose

Displays the series data in rows instead of columns.

Display Latest Value First

Displays the most recent value first

Embed

The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

Auto Refresh

Refreshes the request automatically when you open the spreadsheet.

Visible button

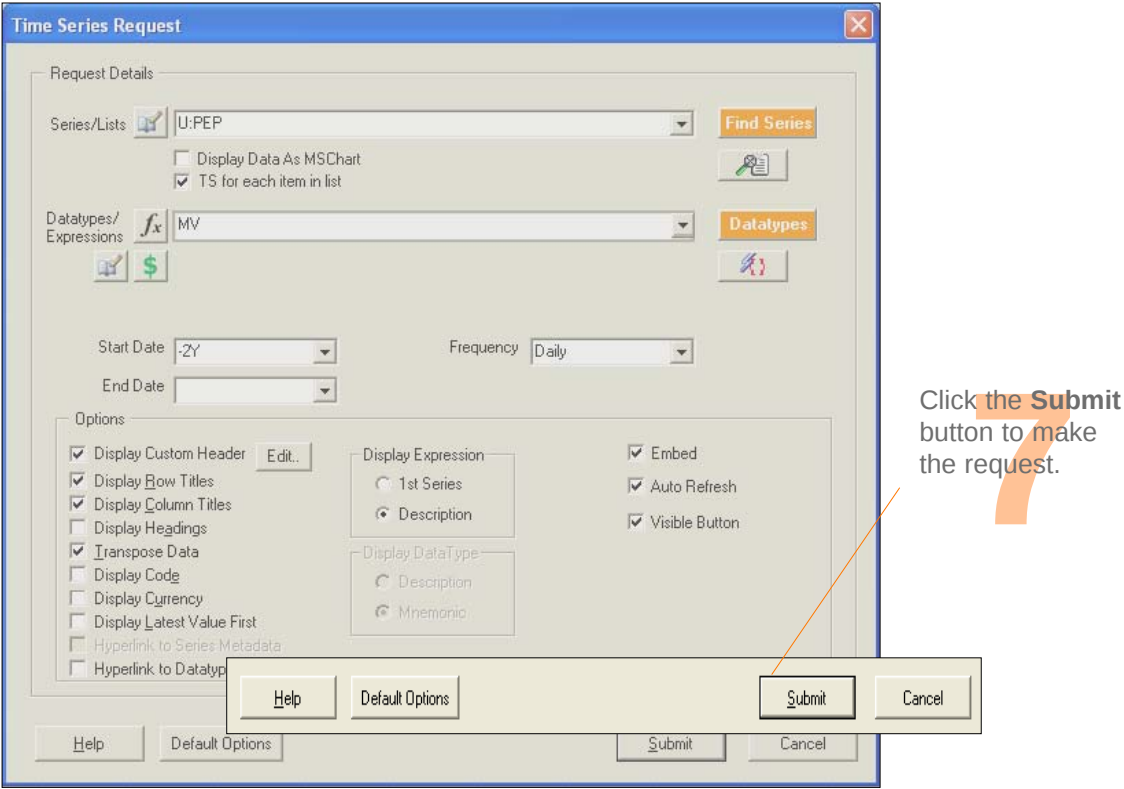
Displays the **Refresh** button with the request results. You can use the **Request Manager** to refresh requests, See page 49.

Series Metadata

Adds a hyperlink to the series code to link to the classifications and metadata pages from Navigator for the series (also enable series that are now dead or inactive to be identified in your workbook).

Hyperlink to Datatype Definition

Add links to the datatype to display the definition from Navigator.



The values for the datatypes selected are displayed for the date selected.

A	B	C	D	E	F	G	H
Start	11/28/2003						
End	11/29/2005						
Frequency	D						
Name	CURRENCY	11/28/2003	12/1/2003	12/2/2003	12/3/2003	12/4/2003	12/5/2003
PEPSICO	U\$	82609.81	83622.69	82644.13	81888.75	82661.31	83262.19

To refresh the request, click on the **Refresh** button.

USING THE REQUEST MANAGER

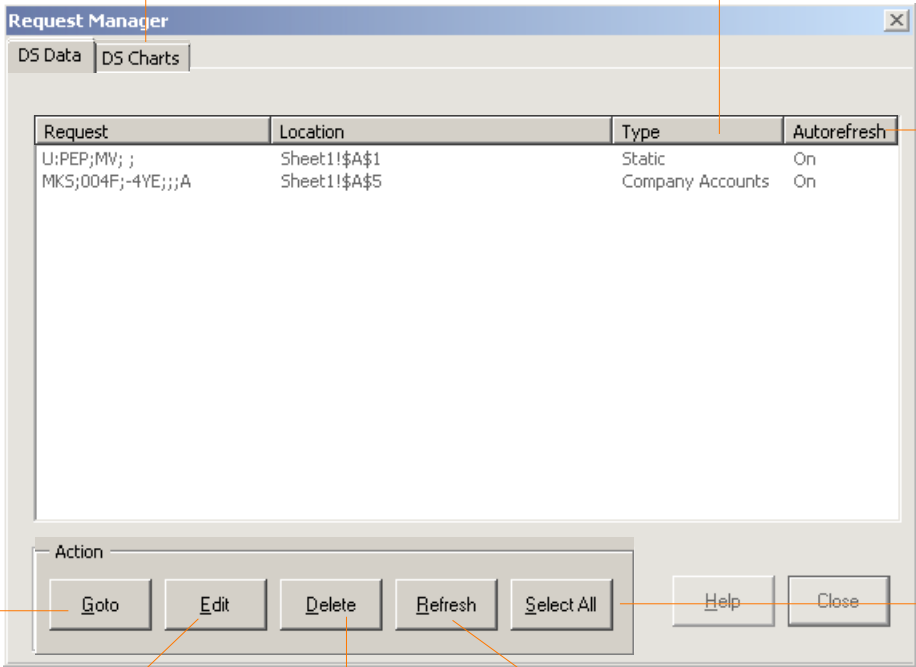
Use the Request Manager to manage the requests in your worksheet. The Request Manager lists all the requests in your worksheet. You can find, edit, refresh, and delete requests.

Select **Request Manager** from the **AFO** menu.

Select either data or chart requests.

Select the request and click the appropriate button to **Goto**, **Edit**, **Delete**, or **Refresh** the request.

Click to turn **Autorefresh** on or off for the selected requests.



Click to locate and display the selected request in the worksheet.

Click to display the **Request Details** dialog for editing.

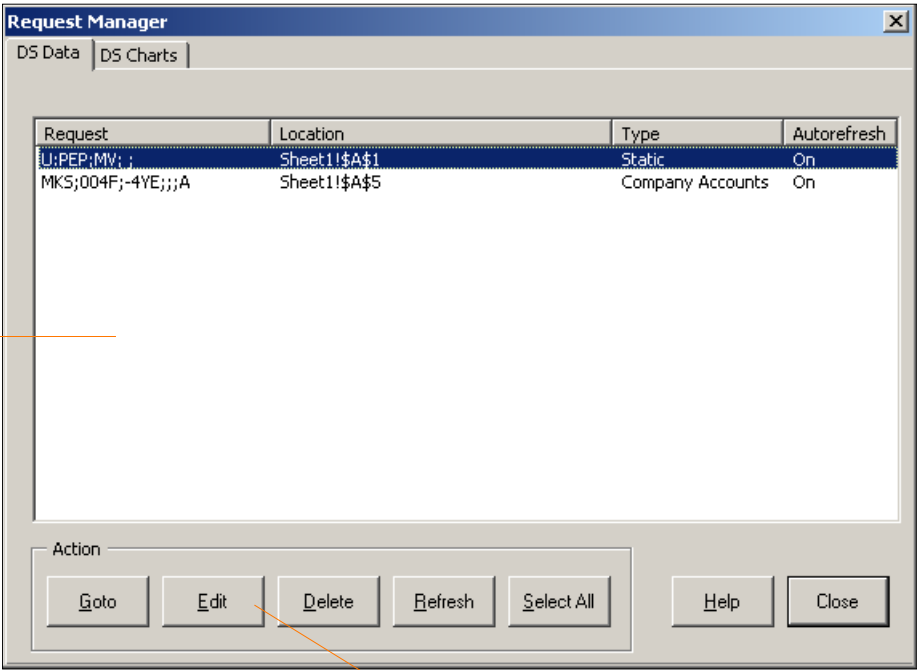
Click to delete the selected request.

Click to refresh the data in the selected requests.

Click to select all the requests displayed. This is useful if you want to refresh, or delete, all requests.

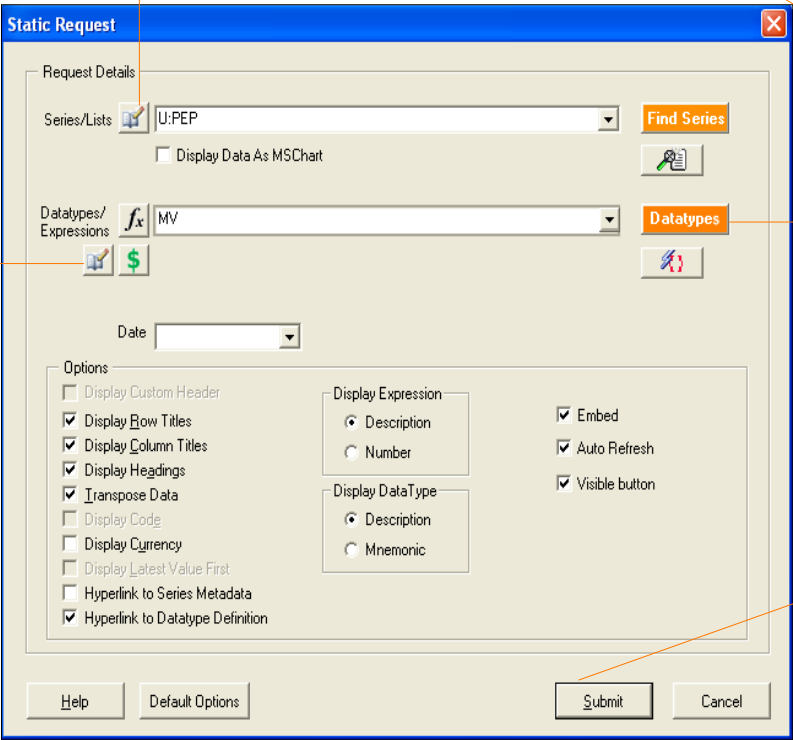
To edit a request, for example, select the request you want to edit.

The Editor option enables multiple series or datatypes/functions/expressions to be easily reviewed, edited and extended with links to the metadata.



Click the Edit button. The Request Details dialog is displayed.

Make your changes and click Submit. The original request is overwritten with the new one.





Worked examples

Creating Datastream lists
Creating a flexible chart
Creating an equity screen

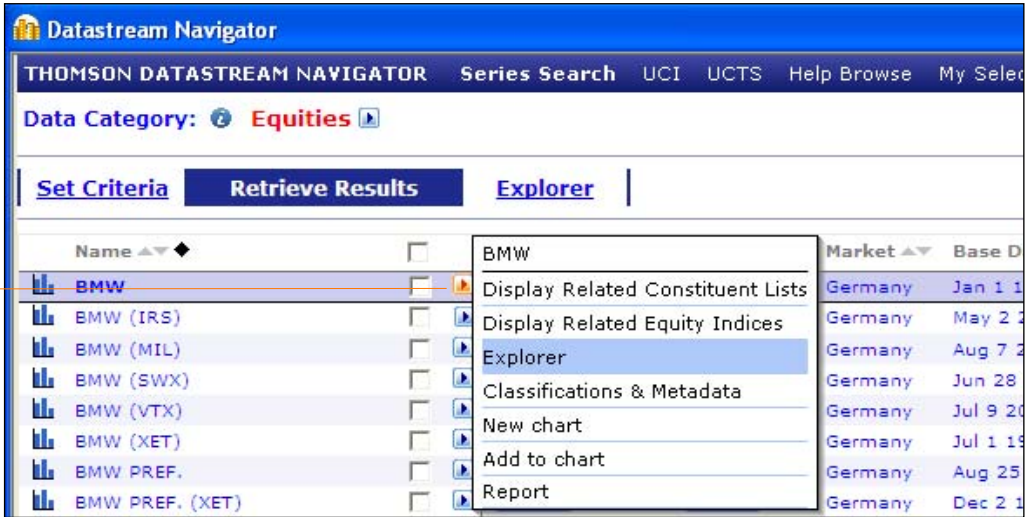
4

Click the **Series navigation** button to display Datastream Navigator.

Click the **Next** button.



Search for the series you want in your list.



Click the Explorer option in the flyout to display related series

Click the **View Selected** link to view the selected series.

Click the check box to select the series.

THOMSON DATASTREAM NAVIGATOR

Series Search

Series Search

UCI

UCTS

Help Browse

InteractivISE

HELP

Data Category: Equities

[Use copied Explorer reference](#)

[Extranet](#)

[Back](#)

[Set Criteria](#)

[Retrieve Results](#)

Explorer

Displayed Results 75

NameContainsIBES EqualsAllWS EqualsAllExchange EqualsAllFilterReset

Automobiles & Parts

Banks

Beverages

Chemicals

Construction & Materials

Electricity

Electronic & Electrical Equipm

Equity Investment Instruments

Financial Services (Sector)

Fixed Line Telecommunications

Food & Drug Retailers

Food Producers

Forestry & Paper

Gas, Water & Multiutilities

General Industrials

General Retailers

Health Care Equipment & Servic

Household Goods & Home Const

Industrial Engineering

Industrial Metals & Mining

Industrial Transportation

Leisure Goods

Life Insurance

Media

Mining

Automobiles & Parts

Name

Use Selected

DS Mnemonic

DS Code

Market

Base Date

Curre

AUDI

☒

D:NSU

922819

Germany

Jan 1 1973

Euro

BBS KRAFTFTZ.

☐

D:BKS3

745070

Germany

May 8 1987

Euro

BERU

☐

D:BZL

896382

Germany

Oct 20 1997

Euro

BMW

☒

D:BMW

923537

Germany

Jan 1 1973

Euro

CONTINENTAL

☐

D:CON

929030

Germany

Jan 1 1973

Euro

CITYCOM

☐

D:CH2

41528R

Germany

Dec 21 2006

Euro

DAIMLER

☐

D:DAI

688700

Germany

Oct 26 1998

Euro

DELTAICOM

☐

D:DEX

413018

Germany

Oct 25 2006

Euro

ELIA TUNING & DESIGN

☐

D:E4D

36122Q

Germany

Jun 9 2006

Euro

CONTITECH

☐

D:BTR

50781W

Germany

Jun 29 2007

Euro

GRAMMER

☐

D:GAM

876251

Germany

Jul 15 1996

Euro

ELRINGKLINGER

☐

D:ZIL2

775188

Germany

Oct 28 1988

Euro

HYMER

☐

D:HYM

775787

Germany

Dec 27 1990

Euro

RHEINMETALL

☐

D:RHM

929129

Germany

Jan 1 1973

Euro

PURVIA

☐

D:3PV

51362N

Germany

Dec 3 2007

Euro

RUECKER

☐

D:RUUK

291742

Germany

May 12 2000

Euro

PORSCHE AML.HLDG.PREF.

☒

D:PAH3

946281

Germany

May 3 1984

Euro

RENK

☐

D:ZAR

952299

Germany

Sep 30 1988

Euro

SALTUS TECHNOLOGY

☐

D:SAT

899005

Germany

Jul 11 1997

Euro

TIAG TABBERT-INDUSTRIE

☐

D:TBBA

539623

Germany

Nov 13 1990

Euro

SAF-HOLLAND

☐

D:SFQ

50820E

Germany

Jul 25 2007

Euro

Items 1-25 of 25

[Criteria](#)

[Retrieve Results](#)

[Reset All Criteria](#)

[Printable version](#)

Select the **Upload** option to add the list to the Datastream database, where it is stored as an L# list. You can also save as a UCI (X#) list. If you do not upload, the list is stored on your local drive or server.

12
Type the description and name for your list

List Wizard

Data Category: equities

Find: **Find Series**

Expert Entry ☐ **+**

Select a Data Category for the List you are creating.
equities

Name	Mnemonic
AUDI	D:NSU
BMW	D:BMW
VOLKSWAGEN	D:VDW
PORSCHE AML.HLDG.PREF.	D:PAH3

List Description: German Automobiles

Help **Cancel** **< Back** **Next >** **Finish**

11
Click **Next**.

13
Click the **Finish** button.

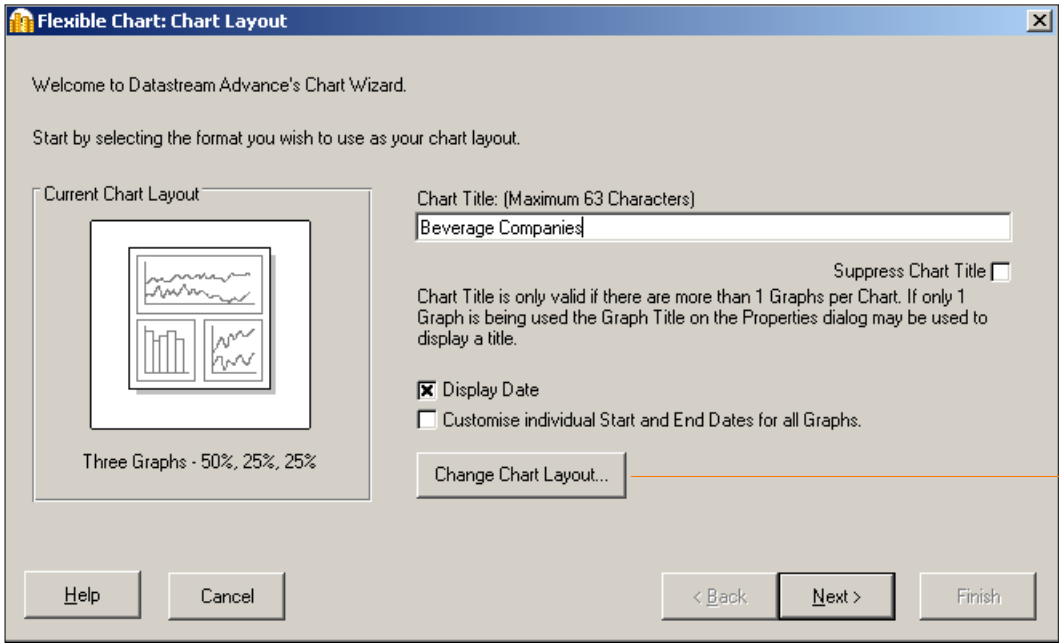
Again there is an option to remove the series from the list. Click the minus sign to remove the series.

Select the data category. **Equities** for Coca-Cola and Pepsi, and **Equity indices** for the S&P 500 Index.

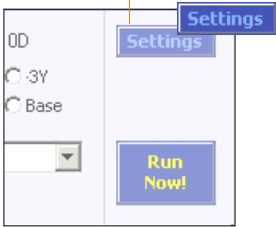
Select the date.



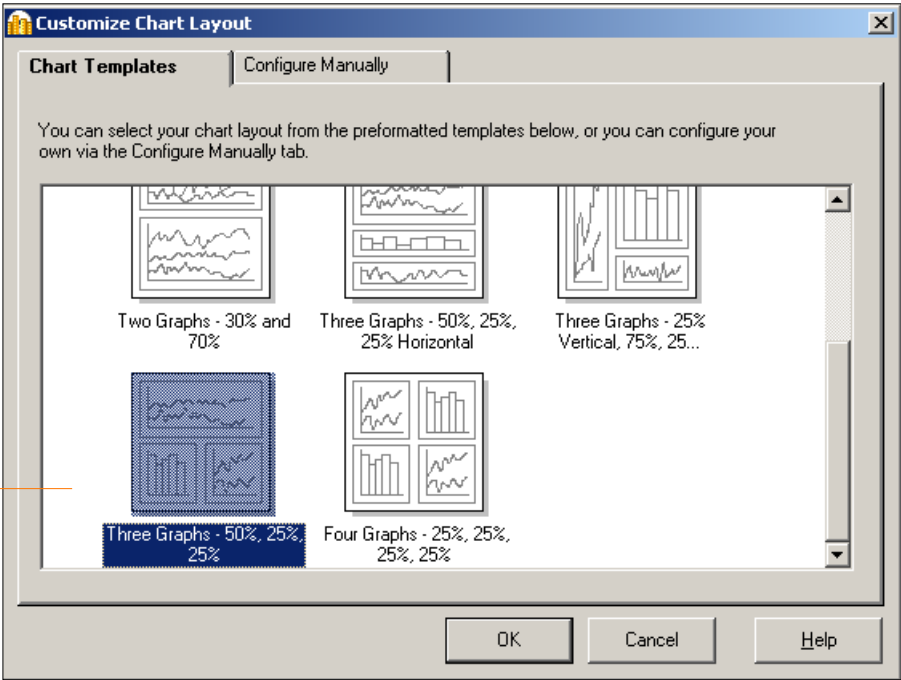




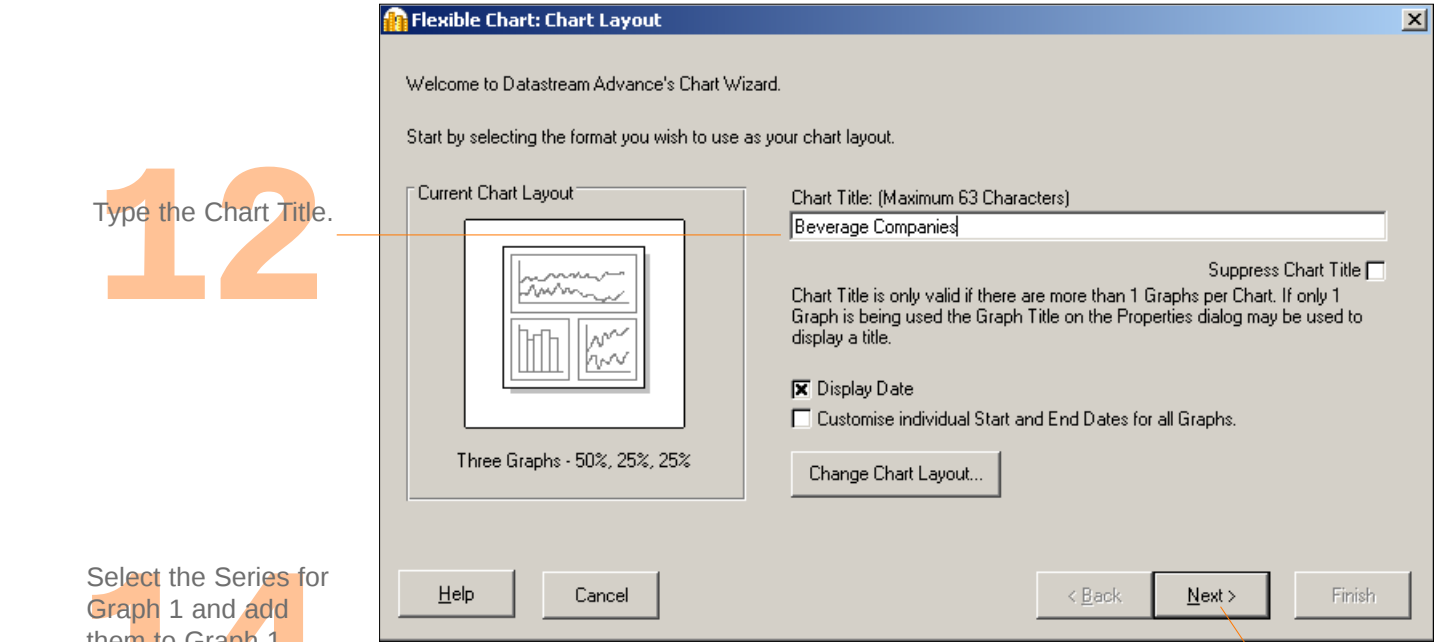
Click the **Settings** button.
The **Flexible Chart Wizard** is displayed.



Click the **Change Chart Layout** button.
The **Customise Chart Layout** dialog is displayed.

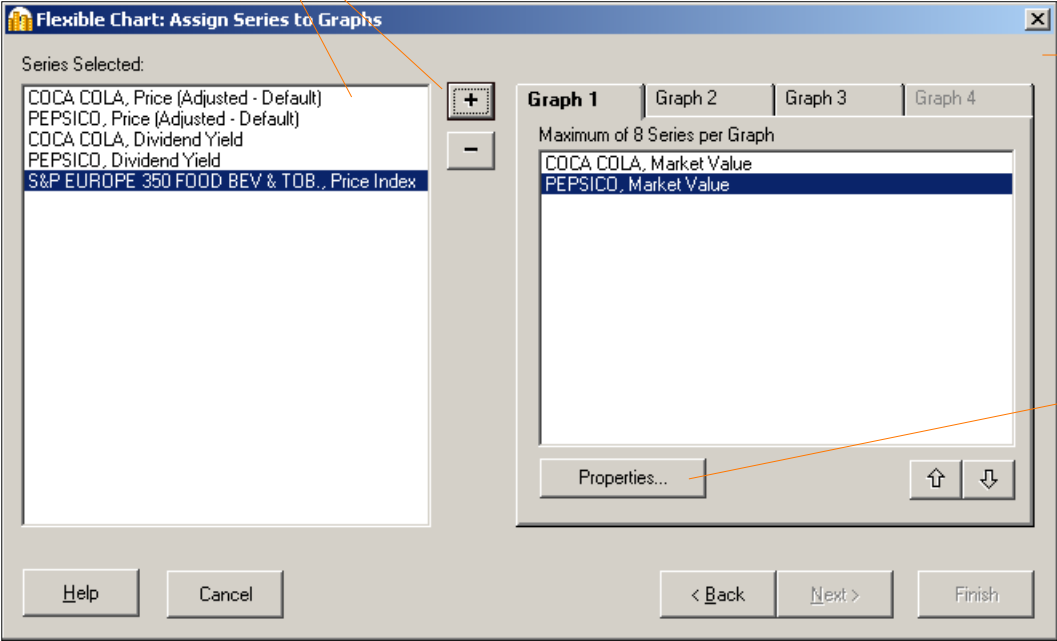


Select three graphs and click **OK**.



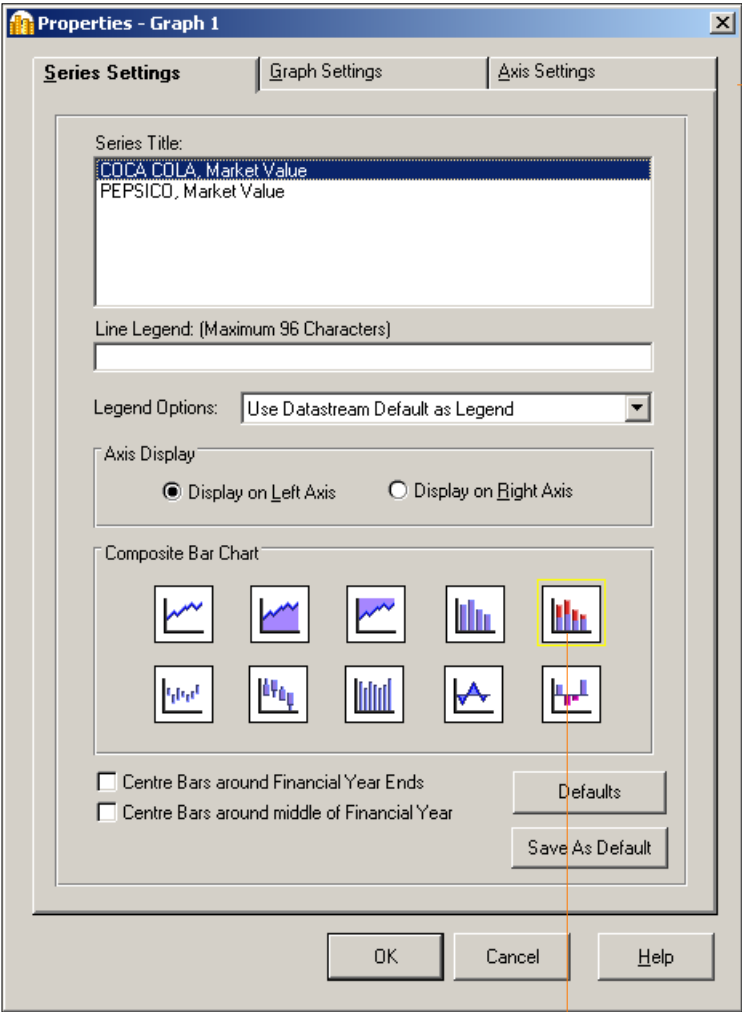
12
Type the Chart Title.

14
Select the Series for Graph 1 and add them to Graph 1.

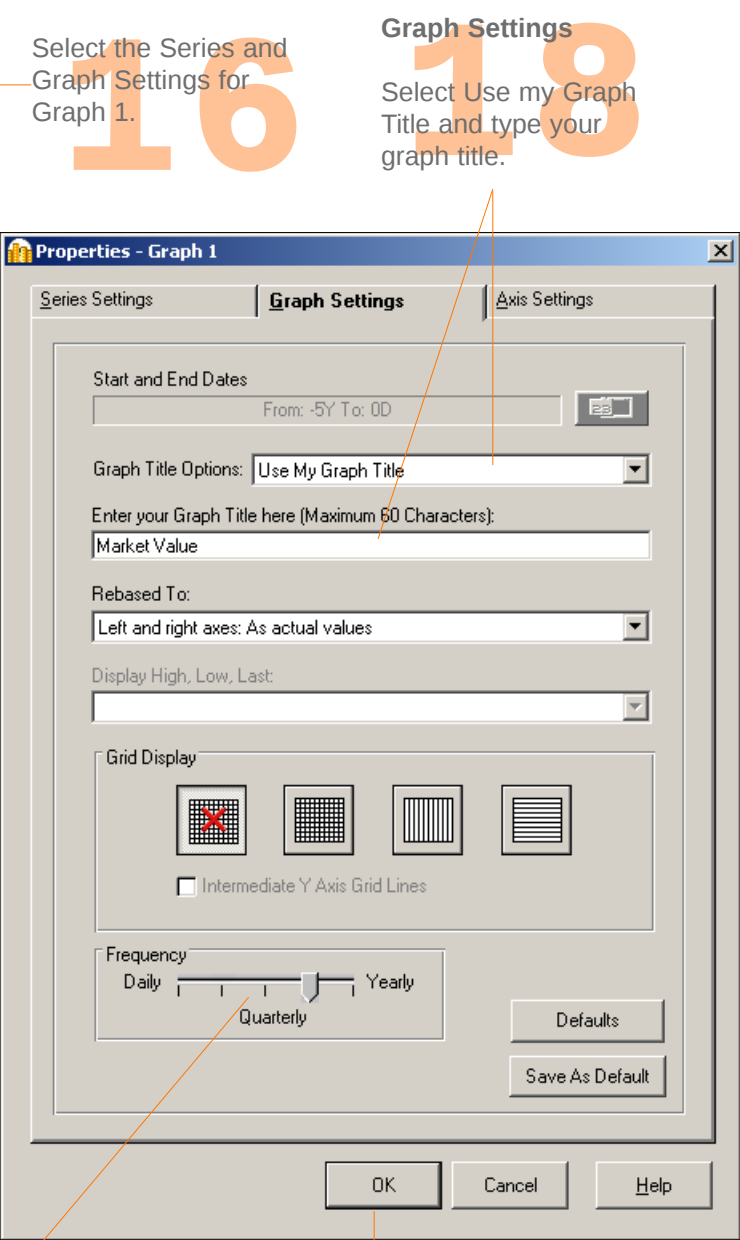


13
Click Next. The Assign Series to Graphs dialog is displayed.

15
Click the Properties button. The Properties for Graph 1 dialog is displayed.



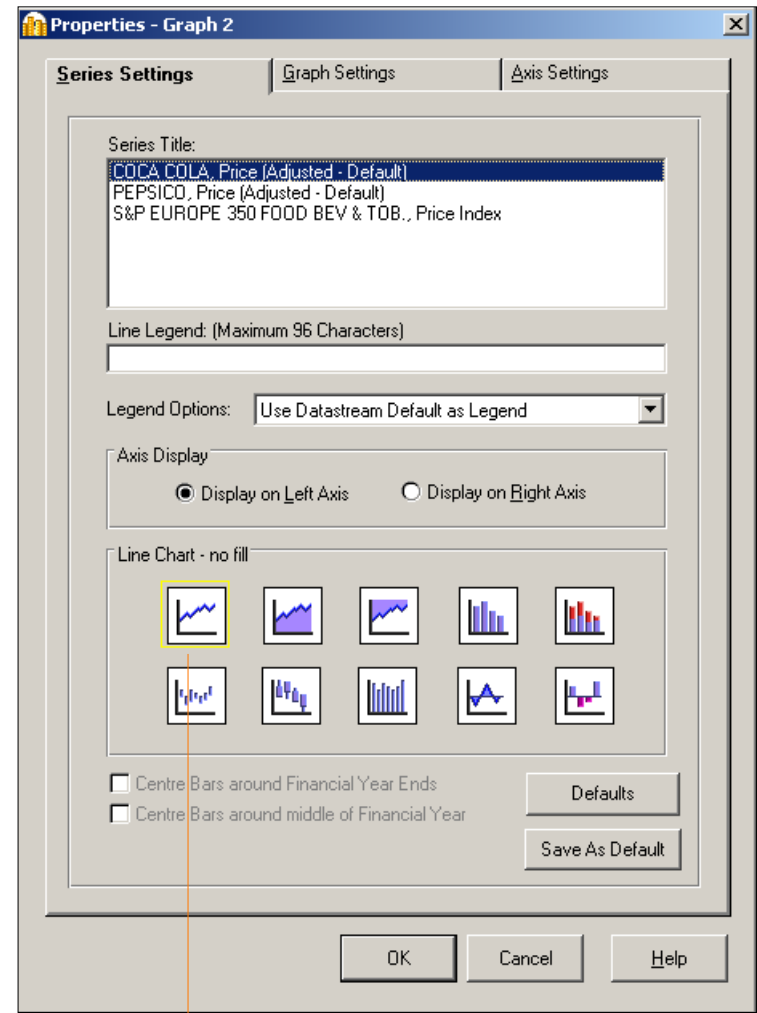
Series Settings
Select the type of chart
for each series:
Composite bar chart.



Graph Settings
Select Use my Graph
Title and type your
graph title.

Select the data
Frequency.

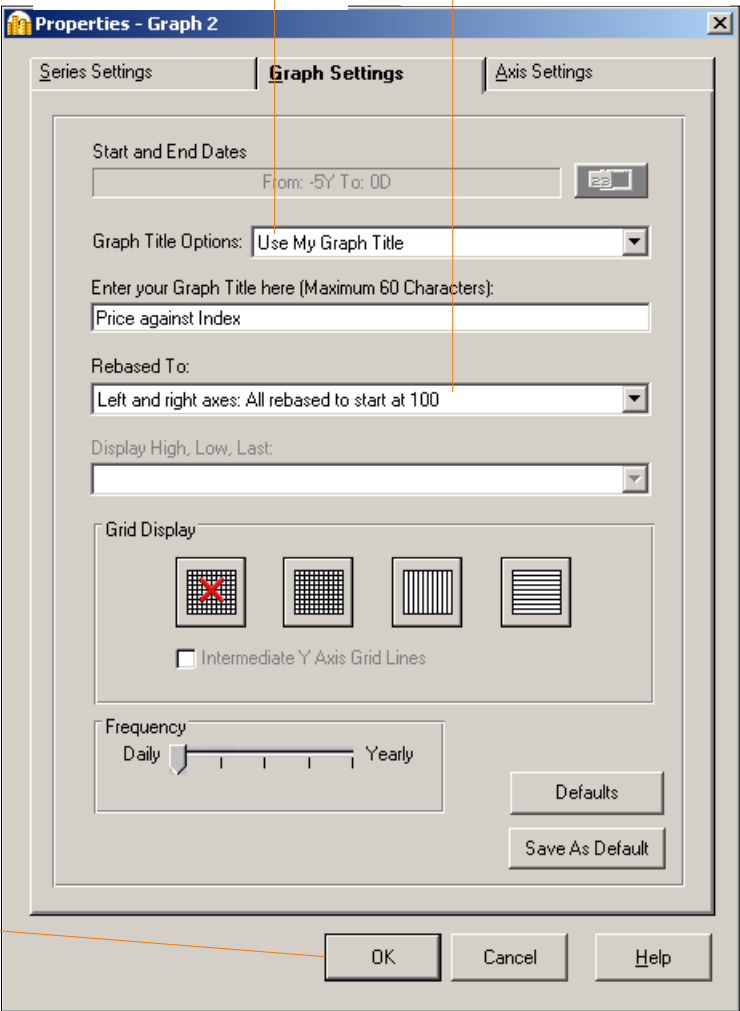
Click **OK**.



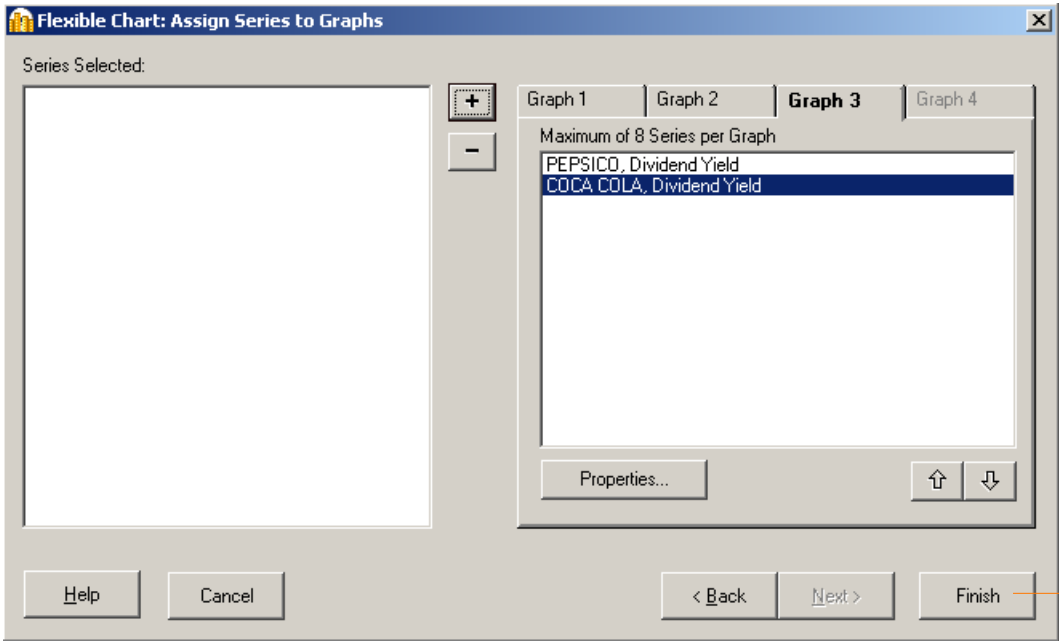
Line Chart

21
Select the Series and Graph settings for graphs 2 and 3.

Select Use my graph title and type the title. Rebase to 100 for graph 2. (Do not rebase graph 3)



22
Click OK.



Click **Finish**.

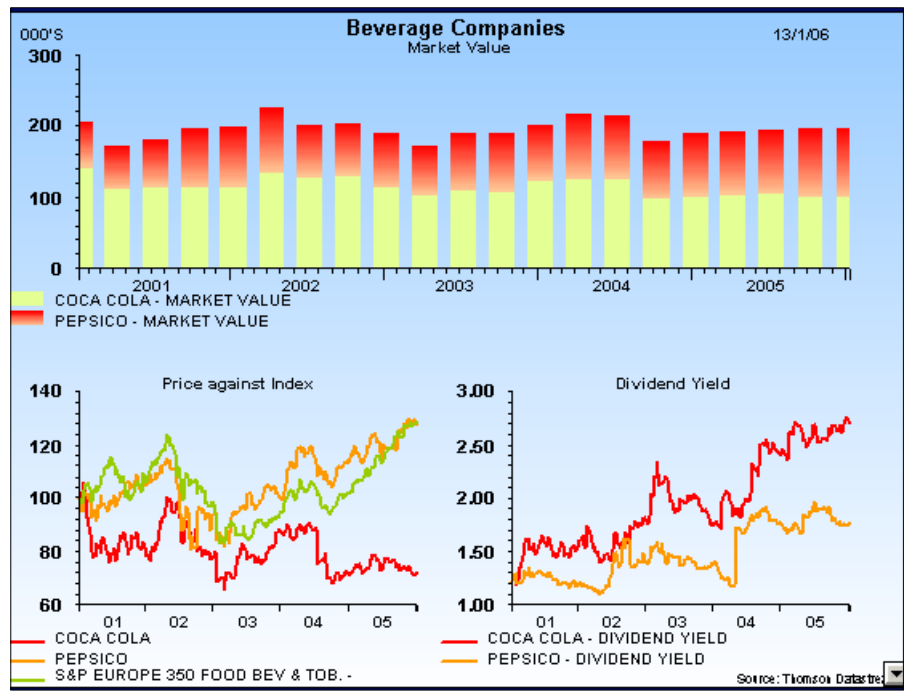
23



Click **Run Now**

24

The results are displayed.



- You can:
- Change the chart properties: Right Click on the chart and select Properties... - then select Icharts from the Scheme dropdown at the top
 - Edit the chart settings; click the **Settings** button
 - Edit the chart using Annotations; Click **Annotations** icon  in the tool bar.
 - Save the flexible chart as a Project; select **File>Save As**
 - Transfer or Export it; select **Tools>Transfer** or **Tools>Export**
- For more information, see the Datastream Help.

CREATING AN EQUITY SCREEN

Equity screening enables you to search the entire global equities database of over 60,000 stocks, or across a region, such as the euro zone, or a single market. You can store your search to edit and re-run at a later date. You can save the results in a list for analysis in Datastream or AFO.

For more information about equity screening and what you can do with them, see the *Datastream Help*.

CREATING AN EQUITY SCREEN

Datastream

File Edit View Tools Help

TOTAL MATCHES = 4

Currency = Euro

Data Type	Limitation	Unit	No. of Matches
Market Value	OVER1	Billions	122
Industry Classification	AUTOS, AUPRT	Default	22

Name	Market Value	Industry Classification
FAURECIA	1.31	AUPRT
VALEO	2.48	AUPRT
PEUGEOT	11.84	AUTOS
RENAULT	19.35	AUTOS

Format Code Description List File

A407 French Automobile Indus C:\pro

☐ Allow Column & Row Resizing In Search Report

Find [Edit Search...](#) [New Search](#)

Request Project Equity Screening

Select the **Equity Screening** tab.

Click the **New Search** button.

3
Select France
from the
Country tab.

Search By

Country

Constituent

Lists

Build a Country based search by selecting either Country Codes or Composite Codes, or by typing in a simple expression.

Country Codes:

ARGENTINA

AUSTRALIA

AUSTRIA

BANGLADESH

BELGIUM

BRAZIL

CANADA

CHILE

CHINA

COLOMBIA

CZECH REPUBLIC

DENMARK

ECUADOR

FINLAND

FRANCE

GERMANY

Composite Code:

AFRICA

Expert Expression (Eg: EEC - UK - FR):

Universe to search (Maximum of 10):

FRANCE

Select the Search By All option if you wish to search the entire Universe.

Search By ALL☐

☐ Historical Search

This date can be relative or absolute.

Help

Cancel

< Back

Next >

Finish

4
Click the Add
button.

5
Click the
Next button.

DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5

68

Click the **Industry & Sector Mnemonic** tab.

Click the **Add** button.

Click the **Datatype navigation** button to search for and select a datatype. See [Selecting a datatype](#), page 24.

Datastream Search Wizard

Search Criteria (Maximum of 10): eg: Find Equities that match Criteria 1 AND Criteria 2 AND Criteria 3 etc...

No.	Data Type	Limitation	Unit
1	Market Value (Capital)		

+

-

Datatypes & Limitations | Industry & Sector Mnemonics | Sort Order & Currency

Datatype Market Value (Capital) **Datatypes**

Limitations: OVER

Value: 1

Units: Billions

☐ Use Expression/Function

fx fx

Help Cancel < Back Search Now! Finish

Select the limitations: over 1 Billion.

Click the **Sort Order & Currency** tab.

Click the **Add** button

Select automobiles from the **Find equities in 1st industry** box.

Select auto parts from the **2nd industry** box.

14
Select euro from the
Currency box.

Datastream Search Wizard

Search Criteria (Maximum of 10): eg: Find Equities that match Criteria 1 AND Criteria 2 AND Criteria 3 etc...

No.	Data Type	Limitation	Unit
1	Market Value	OVER1000	Default
2	Mnemonic - Industry	AUTOS, AUPRT	

Datatypes & Limitations | Industry & Sector Mnemonics | **Sort Order & Currency**

Sort Order

☐ No Sort Order

☒ Ascending Market Value

☐ Descending

☐ Alphabetical

...and sort by Industry Group ☐

...and sort by Sector ☐

Currency (Max. 1 per search):

- Dutch Florin
- East Carribean Dollar
- ECU
- Ecuadorian Sucre
- Egyptian Pound
- Estonian Kroon
- Euro**
- Euro Synthetic (EMU11 DS Calc)
- Euro via Luxembourg Franc
- European Composite Unit
- European Currency Unit

Help Cancel < Back Search Now! Finish

15
Select
Ascending and
Market value.

16
Click the Search
Now button.



Datastream Search Wizard

To store the results of your search as a list and report, click Finish.

☐ Allow Search List & Result to be refreshed

The list will be stored in your lists directory. The file name must end with .LLT

List File:

List Description:

Click Upload to store this List on the Datastream service

Upload

Help

Cancel

< Back

Save As List

Finish

Click the **Upload** button to save your search on Datastream.

Type the file name and description for your search and click the **Finish** button.

DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5

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More...

- Datastream lists
- Expressions and functions
- Flexible charts
- Projects
- Schedule Night Shift
- Equity screening
- Customising charts and reports
- Web browser
- Favourites
- AFO request table
- User created indices
- User created time series
- Ribbon based UI for AFO (in MS-Office 2007 and above)

DATASTREAM LISTS

Datastream provides flexibility in creating lists of series, such as a portfolio, a watch list, or a set of related indicators. One can analyse the series as a set or individually. Lists are a convenient way to make report, chart, and data requests using multiple series. One can create copies of Datastream's index constituent lists, remove unwanted series, reorder the list, or merge two lists to create one. The List Wizard takes you through the process effortlessly.

Online help: Select **Help >Contents >Using Datastream >Local Lists**,
OR
Click the **Help** button on the list wizard dialog box.

EXPRESSIONS AND FUNCTIONS

Datastream's expression picker gives you access to over 50 standard functions and expressions, which one can use to form part of one's chart, report, or data requests. For example, find the percentage change in share price over 12 months.

Datastream's expression builder enables one to create and edit one's own expressions, which one can keep and access through the expression picker for future use.

Online help: Select **Help >Contents >Using Datastream >Expressions and functions**,
OR
Click the **Help** button on the expression picker, or expression builder dialog boxes.

FLEXIBLE CHARTS

Flexible chart gives one the freedom and flexibility to create one's own tailor-made chart layouts. Datastream provides for comprehensive customisation of all aspects of one's graphs.

Flexible Chart is particularly good for creating multiple chart layouts with multiple series using a variety of different chart types and styles.

Online help: Select **Help >Contents >Using Datastream >Flexible Chart**

PROJECTS

Datastream Projects enable one to save one's analysis and automate printing and exporting charts.

One can schedule projects to update at a future time and to print or export the updated requests in a range of graphics or spreadsheet formats.

Online help: Select **Help >Contents >Using Datastream > Projects**

SCHEDULE NIGHT SHIFT

Datastream scheduling enables you to refresh your projects at a future time and on a regular basis. For example, you can refresh your projects overnight giving you access to updated charts, reports, and data the following morning.

Online help: Select **Help >Contents >Using Datastream >Schedule Night Shift**

EQUITY SCREENING

Equity screening enables you to search the entire global equities database of over 60,000 stocks, or across a region, such as the euro zone, or a single market. You can store your search to edit and re-run at a later date. You can save the results in a list for analysis in Datastream or AFO. For a worked example, see page 67.

Online help: Select **Help >Contents >Using Datastream >Equity Screening**

CUSTOMISING CHARTS AND REPORTS

You can customise your charts and reports using properties and annotations. You can change the text, line, and fill styles, and save your styles in a template for future use.

Online help: Select **Help >Contents >Using Datastream >Annotating charts and reports**

WEB BROWSER

The embedded browser links you directly to user support through the Datastream Research Extranet.

Online help: Select **Help >Contents > Using Datastream >Web Browser**

FAVOURITES

Favourites enables you to store your chart or report request with its settings, for example, dates, datatype, currency, etc. You can save them with unique names and select them from a drop down list.

Online help: Select **Help >Contents >Using Datastream >Favourites**

AFO REQUEST TABLE

The request table enables you to manage groups of refreshable requests. You can view the details of all your requests together. You can schedule the table to be updated at a future time or overnight. You can select which requests you want to update.

Online help: Select **Help >Help Contents >Datastream Advance for Office > Using Request Table**

USER CREATED INDICES

The UCI Manager enables you to create and maintain your own indices. Each index is based on a list of constituent series, which you specify as the first step of creating an index. Once created, an index can be automatically maintained for you, with new values calculated daily.

Online help: Select **Help >Contents >Using Datastream >User Created Indices**

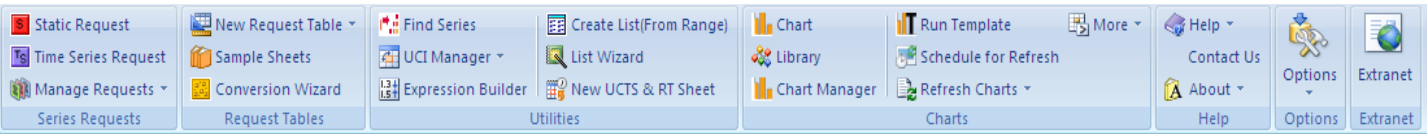
USER CREATED TIME SERIES

A user time series is a series of values (data) for different points in time created by you and uploaded for storage on Datastream. The values can be daily, weekly, monthly, quarterly, or yearly and you can save the series in management groups to help you organise them. You can use these series in Datastream and AFO charts and reports. You can combine them with Datastream maintained series and use functions and expressions to manipulate them. An Excel template is used to create and edit your time series. You can download an existing series to form the basis of a new one.

Online help: Select **Help >Contents >Using Datastream >Favourites**

RIBBON BASED UI FOR AFO (IN MS-OFFICE 2007 AND ABOVE)

When you install AdvanceOffice.xlam and the Charting Addin component, Datastream is available as an Add-In tab. Datastream provides following facilities in the form of seven separate groups.



- **Static Request**
Create a one off or embedded request for a series or list at one point in time.
- **Time Series Request**
Create a one off or embedded request for a series or list at one point over time.
- **Manage Requests**
Create requests for fundamentals information and view, update and edit your embedded requests.
- **New Request Table**
Open a new Request Table to create manage and update spreadsheets.
- **Sample Sheets**
Access a library of spreadsheets.
- **Conversion Wizard**
Upgrade spreadsheets to the latest version.
- **Find Series**
Find the series you require.
- **UCI Manager**
Create, calculate and select User Created Indices.
- **Expression Builder**
View and create saved expressions.
- **Create List (From Range)**
Create a local central system or UCI.
- **List Wizard**
Create local lists using series from navigator.
- **New UCTS sheet**
Open a new User Created Time Sheet.
- **Chart**
Open new chart window.
- **Library**
Open new library window.
- **Chart Manager**
Open Chart Manager to refresh, edit, apply style, remove links, delete and upload charts.
- **Run Template**
Get the latest charts associated to particular Templates in your current spreadsheet.
- **Schedule for Refresh**
Schedule Charts or Chart Templates for Refresh.
- **Refresh Charts**
Refresh selected / all charts with the latest data.
- **More**
Open more chart pages (Key Indicators, Overview, Reports) in a new window.
- **Help**
Access Online help contents, Definitions, Contact Us link and Version details.
- **Options**
Configure a range of settings and defaults.
- **Extranet**
Access the Extranet.



Support



Manuals
Online Help
AFO sample
Telephone support
Account management
Research Extranet support site
Training

FURTHER SUPPORT

Datastream has a comprehensive documentation set to support you. This comprises a complete set of manuals, online help, and interactive options to get you started.

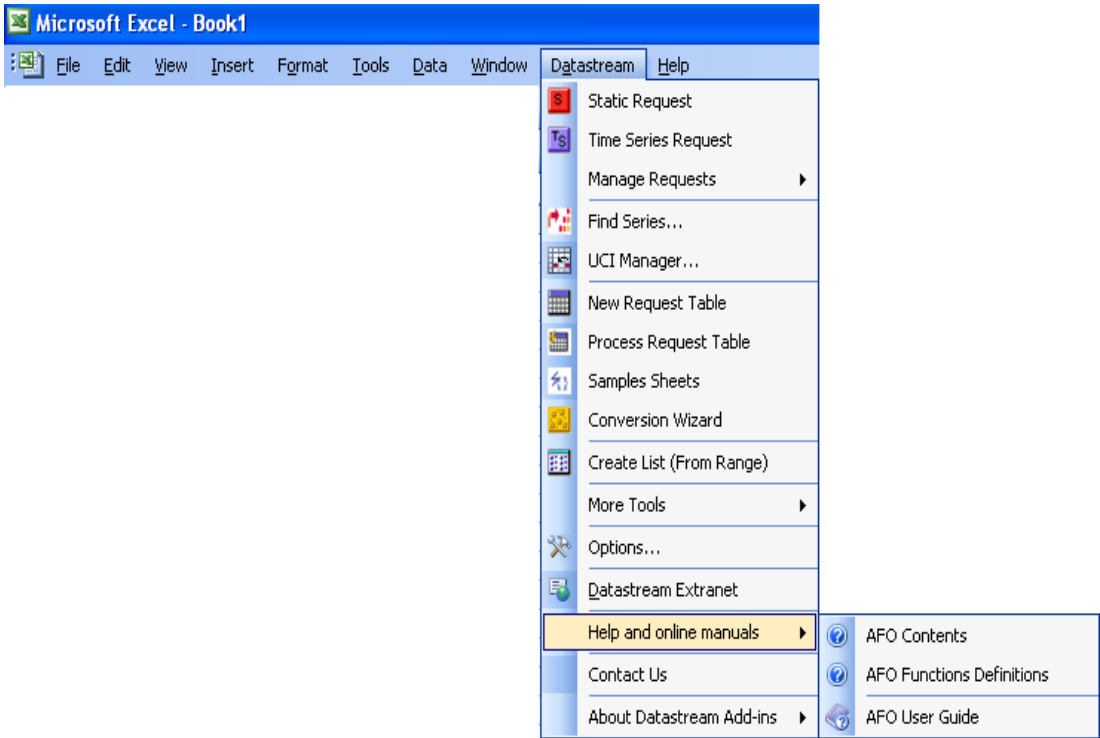
MANUALS

A set of Datastream 5.1 help is available from the Help menu, select online manuals. These are provided as fully bookmarked Adobe Acrobat PDF files. You can browse, select, read, and print the sections you are interested in.



- **Getting started** - A brief guide to getting started with the basics of Datastream.

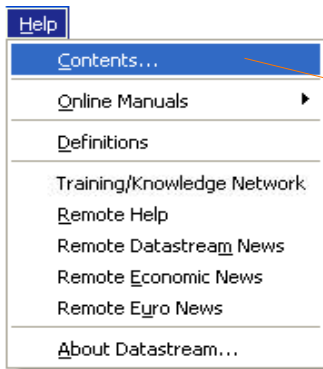
A set of AFO 5.1 user guides is available from the AFO menu in Excel, Word, and PowerPoint: select Online Manuals.



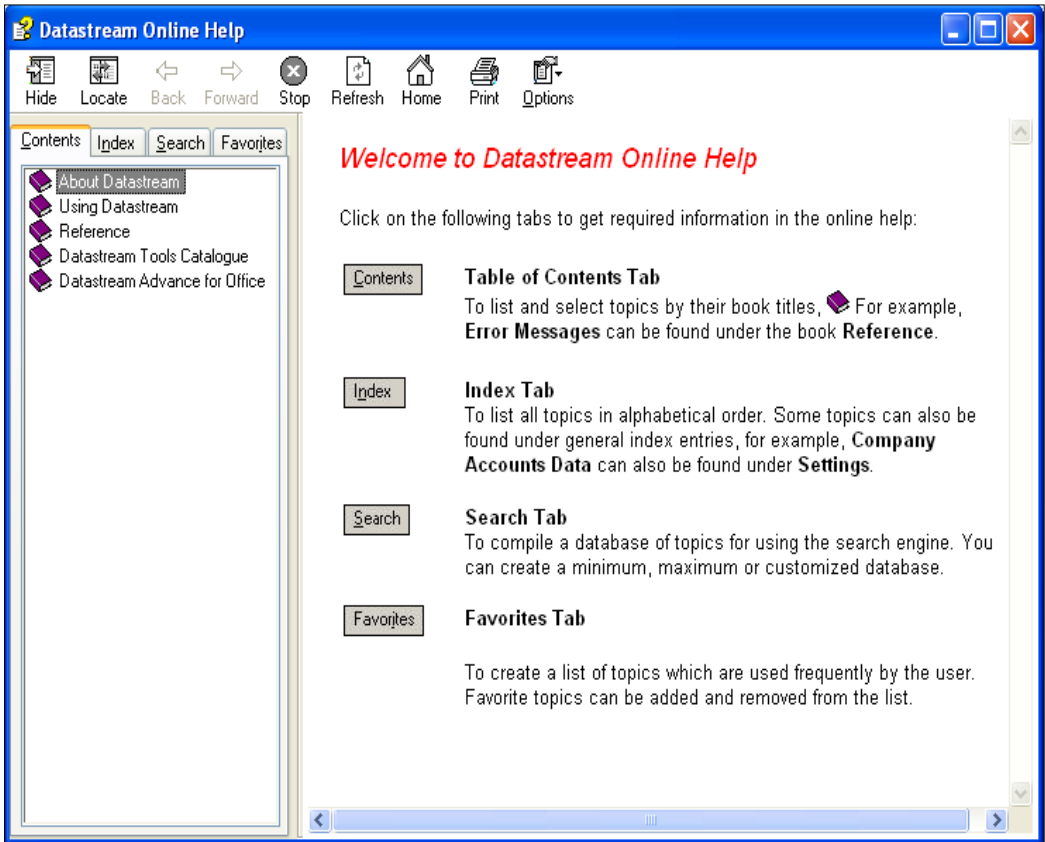
- **User guide Excel** - A comprehensive guide to using AFO with Excel.
- **User guide Word** - A comprehensive guide to using AFO with Word.
- **User guide PowerPoint** - A comprehensive guide to using AFO with PowerPoint.

ONLINE HELP

A comprehensive online help system is available from the Help menu: select Contents. You can also access context sensitive Help from most of the dialog boxes within Datastream.

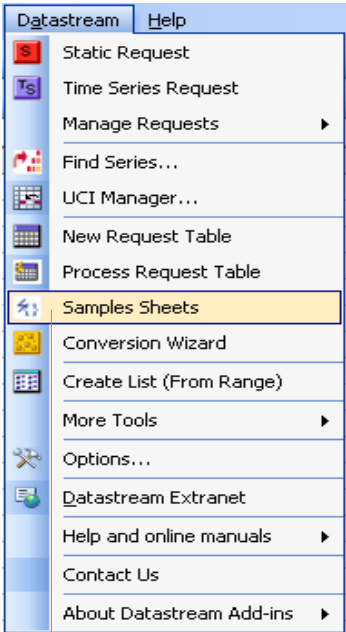


Select **Contents** from the **Help** menu. The **Online Help** opening screen is displayed.

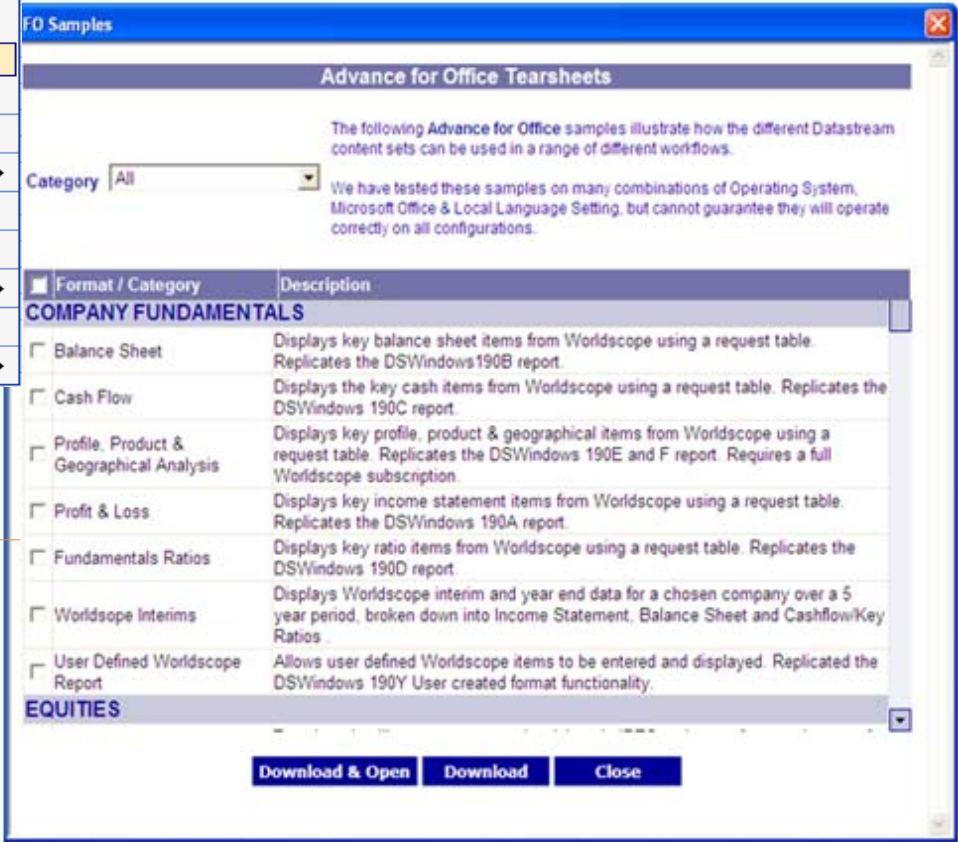


AFO SAMPLES

Datastream Advance for Office samples illustrate how the different Datastream content sets can be used in a range of different workflows. You can access AFO sample from Word, Excel or PowerPoint.



Select **AFO Samples** from the **Help** menu. The **AFO Sample** opening screen is displayed.



SUPPORT

Thomson Reuters provides fully resourced Help desks for queries on Datastream, data, and communications problems. For more information see Contact Us links in the Desktop and add-ins.

ACCOUNT MANAGEMENT

In addition to the service provided by the Help desk, full advice and support is available from your Account Manager.

DATASTREAM RESEARCH EXTRANET SUPPORT SITE

The Extranet contains information on new content and functionality, series code updates and an increasing range of spreadsheets, documents, and presentations showing how Datastream charts and data can be used in Excel, Word, and PowerPoint.

TRAINING

Thomson Reuters provides a range of hands on training options designed to give you the knowledge, practice, and confidence to make full use of Datastream. Contact your Account Manager for complete and up to date information.

CONTACT DETAILS

For current numbers and addresses, see the Extranet:
<http://product.datastream.com/extranet>

Notes

DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED

DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5 DATASTREAM VERSION 5.1, ISSUE 5