

Resources for Financial Statement Analysis



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Industry Information, Forecasts & Future Trends

- **NetAdvantage** company overviews, financials, industry surveys, and stock reports
- **Business & Company Resource Center** articles, investment reports, financials, industry overview, company information
- **Business Monitor Online** global industry and economics database provides quarterly forecasts
- **Business Source Complete** business portal for scholarly and trade literature plus company and industry profiles, market research, SWOT analysis, economic forecasts, etc
- **Factiva** global database of over 9000 publications from 118 countries in 22 languages, includes articles, company/industry/market information
- **Mergent Online** database of publicly traded global companies, includes industry
- **Mintel** market research – good for tracking industry trends/products
- **Gartner** technology trends/forecasts
- **Value Line Research Center** suite of Value Line products, including *Investment Survey* (large, mid & small-cap), *Mutual Fund Survey*, *Daily Options Survey*, *Convertibles Survey*, *Special Situations Survey* (emerging companies), and *ETF's*
- **Morningstar.com Library Edition** complete reports for 2,000 funds and 1,000 stocks. Quicktake Reports, which include portfolio, risk, performance, and management information, are available for approximately 13,000 funds and 8,000 stocks.

Industry Ratios

- **Almanac of Business and Industrial Financial Ratios.** HF 5681 R25 T68 PCL Reference (ask for the CD-Rom at the PCL Reference EIC desk). The numbers are based on summary statistics generated by the United States Internal Revenue Service. Because of the time lag of data being released by the government, the data may be 3 years old. IRS data provides less detailed information, consequently only 180 SIC codes are listed, but data from income statements are more detailed than other sources
- **RMA eStatement Studies** the only source of composite performance metrics derived directly from the financial statements of financial institutions' borrowers and prospects. These financial statements come directly to RMA from member institutions, which get their data straight from their customers.
- **Factiva** good place to find business ratios for global companies – use the Companies tab
- **Mergent Online** industry ratios available in "industry reports"

Financial Analysts' Research Reports

- [NetAdvantage](#) company overviews, financials, industry surveys, and stock reports
- [Business & Company Resource Center](#) search by company and select the investment reports tab
- [Morningstar.com Library Edition](#) complete reports for 2,000 funds and 1,000 stocks. Quicktake Reports, which include portfolio, risk, performance, and management information, are available for approximately 13,000 funds and 8,000 stocks
- [Value Line Research Center](#) – Suite of Value Line products, which include *Investment Survey* (large, mid & small-cap), *Mutual Fund Survey*, *Daily Options Survey*, *Convertibles Survey*, *Special Situations Survey* (emerging companies), and *ETF's*
- [Factiva](#) Reports available comparing companies to companies, companies to industries, and industries to industries
- [Zacks.com](#) Allows you to design a report. Also provides investment research and brokerage reports

Corporate Financials

- [Mergent](#) provides access to company information and 15 years of financials for global publicly traded companies. Reports may be designed, companies compared and screened by several criteria
- [Factiva](#) provides access to global company reports, financials include ratios – use the Companies tab
- [Business & Company Resource Center](#) articles, investment reports, financials, industry overview, company information

Valuation Tools

- [Cost of Capital, Yearbook](#) (Ibbotson's) HC 110 C3 C67 PCL Reference
- [SBBI valuation edition. Stocks, bonds, bills, and inflation ... yearbook](#) HG 4028 V3 S763 PCL Reference
- [ValuationResources.com](#) a free resource guide covers more than 250 industries
- For other valuation books, search the [Library Catalog](#)
 - Keyword: valuation
 - Under ALL Locations, scroll up and select electronic resources to limit to ebooks

Corporate Directories

- [Hoovers](#) public and private company profiles, use build-a-list feature
- [Reference USA](#) basic directory information for over 12 million businesses public and private
- [Corptech](#) company profiles of technology companies

News

- [Business Source Complete](#) scholarly, trade and popular news articles, plus company and industry profiles, market research, SWOT analysis, and economic forecasts
- [Factiva](#) global database of over 9000 publications from 118 countries in 22 languages, includes articles, company/industry/market information
- [Lexis/Nexis](#) newspaper articles, broadcast transcripts, legal information, and more

Credit Reports for Individual Companies

- [Dun and Bradstreet Credit Reports](#) can be purchased individually for a fee or as subscription service to pay as you download
- [Experian Smart Business Reports](#) search company reports free and then pay as you download