

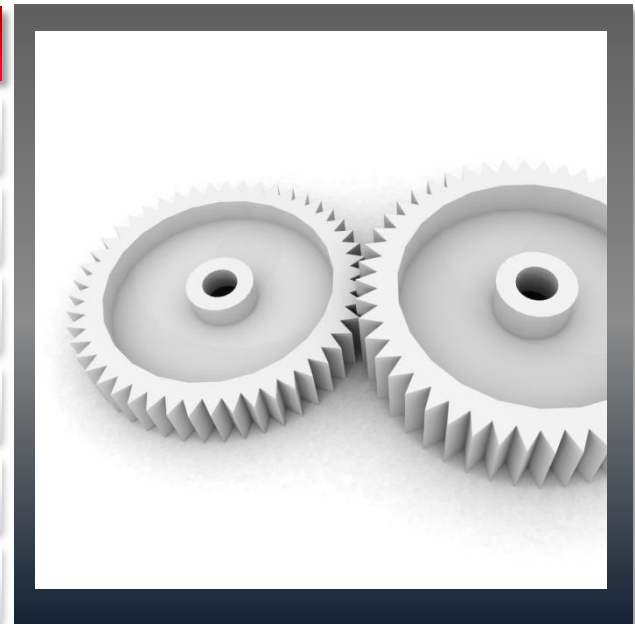
Kenneth Woods Portfolio Management Program

Library Resource Seminar



Today's Agenda

- ✓ 1 **Introduction**
- 2 Finance Newspapers, Journals & Magazines
- 3 Company Fundamentals
- 4 Industry Analysis and Ratios
- 5 Brokerage Reports
- 6 Stock and Economic Data
- 7 Questions



Rajiv Johal

Finance and Economics Librarian

Telephone

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In Person

3

Mon to Fri, from 10-5

Services offered:

Research Assistance

Recommendations for purchase
(textbooks, databases, books...)

Answer questions about the library, and
its resources

Workshops

Library Website



□ Homepage: www.library.concordia.ca

- Access to:
 - Finding books and ebooks (Library Catalogue)
 - Finding articles, reports and data (Databases)
 - Available off campus
- Research Guides for Finance:
 - [Investment Sources Guide](#)

Newspaper & Magazine Articles



Factiva

- Newspapers and magazines
 - Wall Street Journal, Barron's, Globe and Mail

Business Source Complete

- Academic journals
 - Harvard Business Review, McKinsey Quarterly

ProQuest Business Databases

- Academic and trade journals

Company Information



❑ Factiva

❑ [FP Advisor](#)

- All active Canadian public companies

❑ [Mergent](#)

- Company data, Annual reports

❑ [Value Line](#)

- Reports on 1700 largest companies
- [Help Guide](#)

Industry Analysis



- ❑ Business Source Complete
- ❑ [S&P NetAdvantage](#)
 - Industry Surveys
 - Analyst reports, trends, peer analysis, ratios
- ❑ Mergent
 - Access to international industry reports
- ❑ [IBISWorld](#)
 - Detailed US industry reports

Investment Reports



- ❑ S&P NetAdvantage
- ❑ Value Line
 - Covers 1700 equity issues with commentary
- ❑ Investext (Thomson ONE Banker)
 - Brokerage reports
- ❑ [FP Advisor](#)
 - Investor reports section

Thomson ONE



❑ Link via [Investext](#)

❑ Access to:

- Company data
- Analyst research reports
- M&A information
- Current and historical annual reports
- Estimates and opinions...

Analyst Ratings



❑ Not all ratings scales are the same:



Analyst performances

Historical Stock Data



❑ CFMRC

- TSX companies analysis since 1950s

❑ CRSP

- US company data from 1925 onwards

❑ StockGuide

- Canadian companies statements analysis

❑ Datastream

Economic Data



❑ StatCan; Economic release dates

- Canadian Economic Observer
- Canadian Business magazine

❑ Bank of Canada

- Rates and statistics

❑ Economist Intelligence Unit

- Country Reports, forecast data

Resource Summary

Visit the [Finance Research Guide](#) for more information

Articles

1 Sources:

Business Source
Complete

Factiva (Wall Street
Journal, Barron's
Economist...)

Proquest Business
Databases

Company

2 Sources:

FP Advisor (Can)

Mergent (Intl)

Factiva (Intl.)

Thomson One (Intl.)

S&P NetAdvantage (US)

Value Line (US)

Industry

3 Sources:

Business Source
Complete (Intl.)

IBISWorld (US & China)

Mergent (Intl.)

S&P NetAdvantage (US)

Value Line (US)