INTRODUCTION TO BLOOMBERG

ONLINE GUIDE
http://mannlib.cornell.edu/instruction/tutorials/bloomberg/index.cfm

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Getting Started with Bloomberg

- The Bloomberg Station is a stand-alone two-panel set-up in the public computing area.
- Username and Password are provided next to the computer. If you need assistance logging in, please ask the computer operator's desk for assistance.
- Hit the RED key called CONN DFLT to LOGIN
- Type the username and password provided and hit Green key <GO>

The computer also has Internet Explorer, and the complete Microsoft Office suite. Just roll the cursor at the bottom of the screen and you should see Window's Start Menu show up. Bloomberg otherwise dominates the screen.

After Logging in, what?

- At the flashing cursor at the top, type any word that you think is a financial concept, security, or a business entity (equity, Microsoft, etc). The auto-complete features start giving you options
- If you find a perfect match, click on the option
- If you do not know what to do, see the next section on Help features

Help Features on the Bloomberg Terminal

I. Type the keyword followed by the <HELP> key
Example: CREDIT RATING **<HELP>**
The help key works like a search engine. It provides definitions, FAQ and direct access to Bloomberg functions

II. Chat with 24/7 Live Help
Hitting **<HELP> <HELP>** brings up the chat room to send a message to Bloomberg support and ask your question.

III. At any data screen hit the <HELP> key to invoke detailed help on the specific function
Example: Let's say you are looking for information about mergers and acquisitions

- Type Merger at the cursor and Bloomberg auto complete feature will provide some options
- Choose Option MA Merger and Acquisition Search
- To learn more about Mergers & Acquisition Search, click on `<HELP> for explanation`

IV. Go to Bloomberg University   BU **<GO>**

- Bloomberg Certification Program CERT <GO>
- Bloomberg Online Training Videos
- Bloomberg Cheatsheets

The Keyboard

Apart from the regular keyboard functions, Bloomberg works with shortcuts & mnemonics. Please refer to the **handout** that describes the keyboard.

RED KEYS
<CONN DFLT> Hit this key to be prompted for login information.
<CANCEL>   Does not log you out if you hit it once - instead takes you to the Bloomberg support numbers.

GREEN KEYS
Green keys are action keys. You do not have to hit anything else. They tell Bloomberg that a request has been made.

<GO> works like the 'enter key' - Hit it to activate any function.
<NEWS> brings up the headlines that are archived indefinitely.
<MENU> takes you to the **MAIN** menu or returns to previous menus that you were viewing. It works like a "back" button.

YELLOW KEYS
Yellow Keys define the markets. Every financial instrument or index in Bloomberg is accessed by using a ticker symbol and followed by a yellow market sector key (e.g., MSFT **<EQUITY>)**

Downloading: BBXL <GO>

Mann Library has an academic license that permits downloading. This is not within the scope of the introductory workshop. If you need directions, please contact instructor or go to the function BBXL <GO> to learn more.   You can also download print, email images of most of the screens, which will be covered in the session. Any topic that is grayed out is not available in the academic version.

Export Options

If it is possible to download, then the "Export" tab at the top of the screen will contain active links to "Print Screen" and "Grab screen." If the options under Export are grayed out, then you will not be able to print/send the screenshot. This is often the case for top level menus for market sectors. The GREEN Print button on the keyboard also sends the screenshot to the printer.

Grab Screen:

- Alternatively, type GRAB at the cursor and hit <GO>.
- This prompts you to enter your email address. Hit <GO>
- Enter the subject line. Hit <GO>
- You will see the various options at the top. If you are ready to send, then type 1 <GO>

Creating your own login

1. At the Bloomberg terminal, do not login with the public login.
2. Create your own login by hitting <GO> at the login screen
3. Fill out the form to create your own login
4. Keep your cell phone handy. You will need to provide a number that a Bloomberg representative can call you back. If you do not have a cell phone, then borrow the cordless phone from the computer operator's desk. The number is 607-255-3240. Provide this number on the form.
5. Once you have submitted the form, you will receive a call within 5-10 minutes.
6. Login with your newly created login information.
7. The Bloomberg representative will send a confirmation number which you will see on the Bloomberg screen. You will need to read this number off to the representative.
8. And you are all set!

Product Certification

Use your own personal login to get certified. Type the words *Bloomberg University* or BU and hit the GO button. Bloomberg permits all academic users to earn product certification completely on-line and there is no fee for this certification. The important features of this certification process are:

1. Click on the section titled **Product Certification**
2. In the overview section, you will find information about the modules
3. You can earn certification in 2 tracks - equity or fixed income.
4. When you earn both equity and fixed income certificates, you are fully certified. But you do not have to certify in both. You can choose the specialization that interests you the most.
5. Three introductory modules are common to both the specializations.
6. In addition to the three intro modules, you need to pass 5 more modules in your chosen area of specialization.
7. If you do not pass any module, you can choose among other elective modules to substitute for the modules you did not pass.
8. You need a score of 70% or above to pass each module. Tests are not reset, so you get only one chance to pass the test.
9. Back on the main Bloomberg University screen, you will find links to videos that you watch before you take the tests.
10. The certification can be completed at your own pace. You would watch video tutorials and practice as much as needed.
11. Each video also has an accompanying handout with a specific document number. The video tutorial page provides you the directions to obtain the documents.
12. You can expect to spend at least one hour per module. You are strongly encouraged to take the time you need to explore the system and practice before taking the test.

BLOOMBERG CHEAT SHEET I

Select Bloomberg Functions & Definitions for:

Equity Idea Generation & Portfolio Functions

MA <GO>
Displays current and historical merger and acquisition (M&A) details for public & private transactions.
(click on mergers and Acquisitions Search)

LEAG <GO>
List underwriter/legal adviser ranking.

ECDR <GO>
Monitor initial public offerings and secondary equity offerings to analyze how to raise capital and gauge market receptiveness.

ECO <GO>
Display, customize and manage multiple economic calendars by region/country/event on a historical, current or upcoming basis.

ECST <GO>
Display current and historical economic statistics for selected nations.

BBEA <GO>
Displays a menu for earning analysis related news. Find earnings surprises and trends from selected countries.

N <GO>
The front page for all news options.

BBSA <GO>
A search for analyst research including recommendations, rating changes.

WEI <GO>
Compare regional indices against one another and determine current and historical levels.

WPE <GO>
Displays price/earnings ratios and dividend yields of benchmark equity indices from around the world.

MOST <GO>
Displays the day's most active stocks by volume, the leading advancers and decliners by percentage or net/gain loss, and stocks with the most value traded.

MOV <GO>
Analyze stocks that drive movement of a selected index to determine which stocks are under or over-performing compared to the index.

EMI <GO>
Monitor current market information in global equity markets.

SPX <INDEX> GRR
GRR ranks returns of all industry groups in a selected index during a specific time. Substitute the index symbol SPX with any index you wish to dissect.

PRTU <GO>
Displays a list of portfolios that you have created and shared portfolios.

PFST <GO>
Update, create, or delete a portfolio.

PLST <GO>
Display a list of your portfolios

RVP <GO>
Perform a customized peer group analysis to benchmark the company's performance against industry. After choosing the portfolio or equity or index, type RVP at the cursor and hit <GO>

QSRC <GO> or EQS <GO>
Screen for equity based on variety of criteria.

Shortcut mnemonic for accessing main page of a security directly

MSFT US <EQUITY> <GO>

BLOOMBERG CHEAT SHEET II

Select Bloomberg Functions & Definitions for:

Fundamental & Technical Analysis

Choose a company or security first and then type these functions

Shortcut Example: MSFT US <EQUITY> FA <GO>

BR <GO> Search and display research reports, news stories and multimedia.	**FDO <GO>** Display calculations and definitions for a company's fundamental information.	**FINL <GO>** Displays information on analytics, documentation and training related to equity fundamentals product.
EVTS <GO> Display corporate events information for a variety of companies. Use for earning announcements.	**FA <GO>** Evaluate a company's financials in one comprehensive and customizable view that is easier to chart and analyze.	**GPO <GO>** Bar Chart - Graph high, low, open, and closing historical prices and two moving averages for a selected security.
EE <GO> Display Bloomberg's earnings projections, and third party projections.	**CH <GO>** Use CH to display the financial history for a specific company.	**GPC <GO>** Candle Chart - Graph high, low, open, and closing historical prices and two moving averages for a selected security.
EM <GO> Compare reported data items with future estimates in an easy format.	**BQ <GO>** Display a composite overview of key price and trade data, fundamental information, and news for a selected equity.	**CNDL <GO>** Candlestick graph of historical prices and pattern formations for a selected security.
GUID <GO> Evaluate a company's own estimates in one comprehensive view.	**CF <GO>** Search for corporate filings by basic and advanced search criteria.	**GEG <GO>** Display a menu of sample graph worksheets
RV <GO> Perform customized peer group analysis to benchmark a company's performance or capital structure against the industry.	**DVD <GO>** Display information about a selected security's dividend/split history.	**G <GO>** Create and maintain customized technical charts for specific securities.

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<p style="color:red; text-align:center">BLOOMBERG CHEAT SHEET III</p>

Select Bloomberg Functions & Definitions for:

Fixed Income Idea Generation & Credit Analysis

TOP <GO>
Display top Bloomberg news headlines for stories from market sectors around the world.

FOMC <GO>
Display announcements and policy changes carried out by the Federal Open Market Committee (FOMC).

NIM <GO>
Monitor new bond and equity offerings and analyze how to raise capital in the market place.

SRCH <GO>
Search Bloomberg's fixed income database so that you can find bonds that best meets your investment needs.

CDSD <GO>
Set up curve preferences for par credit default swap spread curves.

ECO <GO>
Display, customize and manage multiple economic calendars by region/country/event on historical, current or upcoming basis.

<GOVT> <GO>
The yellow sector key that takes you to the main menu of all government security functions.

YCRV <GO>
Display bond, money market, swap, municipal fair market, or corporate fair market yield curves that you can use for relative value comparisons on both a current and historical basis.

FWCV <GO>
Analyze projected forward rates for fair market curves, interest rate swap curves, and government curves.

NI CRA <GO>
Search and display news stories, research reports, and multimedia presentations on corporate and country debt ratings.

NI DRA <GO>
Search and display news stories, research reports, and multimedia presentations on bond and loan ratings.

RATC <GO>
Display a list of current and historical credit ratings for various issuers.

RELS <GO>
Overview of a company's capital structure including detailed company description.

CF <GO>
Search for corporate filings by basic and advanced search criteria.

DDIS <GO>
Display maturity distribution of outstanding debt and loans for a selected issuer.

WCDS <GO>
Monitor current values and changes to credit default swap spreads and compare issuers' historical spreads or term structure of interest rates.