



Bloomberg

Bloomberg provides real-time and historical financial market data and economic data, covering all sectors worldwide. It also features analytics, company financials, news, and customizable charting.

This guide provides a quick introduction to the Bloomberg system, including the custom keyboard and basic function keys, as well as the Excel Add-in functionality.

LOG ON

Bloomberg terminals are located in Makena Capital Traders Pit of the Library. To log on:

1. Use your SUNet ID/password to log into the computer.
2. Open Bloomberg, and press **CONN DFLT** to bring up the Bloomberg login box.
3. Enter the username/password posted on the Bloomberg monitor. Press **GO**

LOG OFF

1. Press **CONN DFLT** or right-click on screen > select **Exit Bloomberg**.
2. Remember to log yourself off the computer.

HELP

Three ways to use **HELP** key:

1. Press the key to define terminology, formulas, and applications.
2. Type the terms you'd like to research, and press the key to get related data menu
3. Press the key twice to chat with a specialist at Bloomberg's Analytics desk anytime around the clock.

Enter **BU GO** to access "Bloomberg University" online tutorials and a schedule of Bloomberg training courses.

THE BLOOMBERG KEYBOARD

The Bloomberg keyboard is color-coded to give users quick access to data and to specific functions.

Yellow Market Sector Keys

GOVT	Worldwide sovereign and agency securities	PFD	Preferred stocks
CORP	Corporate debt	EQUITY	Common stocks, options, mutual funds, company financials, SEC filings
MTGE	Mortgage market instruments	CMDTY	Commodities, futures, options
M-MKT	Money market information	INDEX	Global equity indices, economic indices
MUNI	U.S. municipality issued debt	CRNCY	Currency markets

Green Action Keys

GO	Execute a function	HELP	Get definitions, related data menu; press twice to chat with a Bloomberg specialist
MENU	Go back one level	PRINT	Print a screen

SEARCHING BLOOMBERG

Upon login, Bloomberg opens four windows. Press **PANEL** to toggle between the windows.

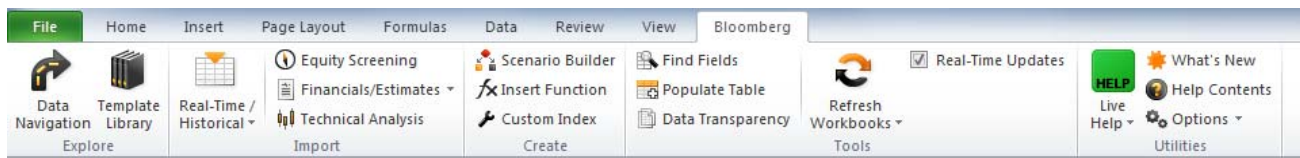
Bloomberg is a menu-driven database. To access the menu of any functions, use the **Market Sector** keys, mnemonics, or enter a term followed by the **HELP** key.

Mnemonics are shortcuts to functions and they are displayed in capital letters next to the numbers on a menu, e.g. **HP** for Historical Price, **WEI** for World Equity Indices, **MA** for Mergers and Acquisitions, etc.

Data	Enter Function at Top of Screen	Examples
Screening equities	EQS GO	
Finding the ticker for a company	EQUITY TK GO company name GO	EQUITY TK GO Apple Inc GO
Searching for a company	Company name HELP GO	Apple Inc HELP GO
	Ticker HELP GO	AAPL HELP GO
Historical stock prices	Ticker EQUITY HP GO	AAPL EQUITY HP GO
Company description	Ticker EQUITY DES GO	AAPL EQUITY DES GO
Company financials	Ticker EQUITY GO , then choose 4) Fundamentals and Estimates	AAPL EQUITY GO
	Ticker EQUITY FA GO	AAPL EQUITY FA GO
Dividends	Ticker EQUITY DVD GO	AAPL EQUITY DVD GO
Comparing stock performance with S&P500	Ticker EQUITY SPX INDEX GO	AAPL EQUITY SPX INDEX GO
Company news	Ticker EQUITY CN GO	AAPL EQUITY CN GO
Options	Ticker EQUITY OMON GO	AAPL EQUITY OMON GO
Historical beta	Ticker EQUITY BETA GO	AAPL EQUITY BETA GO
Comparing two stocks	Ticker 1 EQUITY Ticker 2 EQUITY GO	AAPL EQUITY GOOG EQUITY GO
Total return analysis	Ticker EQUITY TRA GO	AAPL EQUITY TRA GO
	Index symbol INDEX TRA GO	SPX INDEX TRA GO
Corporate bonds	Search by issuer: Ticker CORP GO	GOOG CORP GO
	Search for specific bond: Ticker Coupon Rate Maturity CORP GO	GOOG 3.625 05/19/21 CORP GO
Government bonds	Worldwide government bonds: WB GO	
	US Treasury bonds: CT10 GOVT GO for the 10 year bond CT5 GOVT GO for the 5 year bond	
	US generic bonds: USGG5YR INDEX GO USGG10YR INDEX GO	
League tables for equity or bond deals	LEAG GO	
M&A	MA GO	
Futures contracts	WF GO	
Spot and forward rates	CRNCY FRD GO	
Exchange rates	Search by region: CRNCY TKC GO	
	For world currency ranges: CRNCY WCR GO	

BLOOMBERG EXCEL ADD-IN

Bloomberg Excel Add-in is a powerful tool that delivers Bloomberg data directly into Excel spreadsheet for custom analysis and calculations. To install the Add-In, follow the instruction posted by the Bloomberg computers.



Data Wizard

Click the **Real-Time/Historical** icon to open the Data Wizard.



Market, Reference, Analytical, Data Sets : the most recent data from 500+ fields, including analytics, real time prices, fundamentals, etc.



Historical End of Day: time series data for a specified time period in increments of days, weeks, months, quarters, or years



Historic Intraday Bars: intra-day data for various market parameters for up-to 50 days with an interval down to one minute



Historical Intraday Ticks: Intraday market ticks for time increments, based on big, ask, or trade events.



Download Time Series Data for a List of Securities on a Spreadsheet

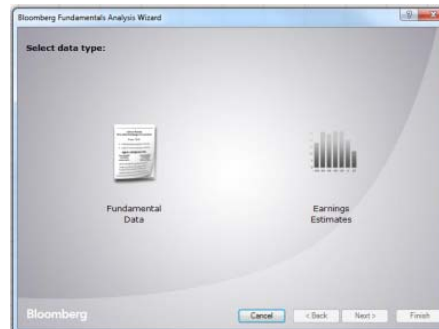
1. Open a spreadsheet containing a list of securities, in the format with Bloomberg identifiers, e.g. AAPL Equity.
2. Click on **Real-Time/Historical** icon to open the Data Wizard, and select the type of data you need.
3. Use the **Select securities > From** drop-down list to select **Spreadsheet**.
4. Enter the range of input fields, e.g. **\$A\$2:\$A\$4**
5. Click **Import > Next**. Follow the steps in the Wizard to select search criteria, periodicity, and time frame.

Fundamental Analysis wizard

Click on Financials/Estimates to open the wizard.

Fundamental Data: Use the Fundamental Wizard to select templates for securities and retrieve end-of-day data for a specified period of time in increments of days, weeks, months, quarters, or years.

Earnings Estimates: Use the Earning Estimates wizard to display earnings projections, for a specific equity or group of equities, so you can quickly gauge market expectations.



Field Search

Click on **Find Fields** to create a data table by selecting and applying available data fields directly to a row or column of the spreadsheet and populate the table with data extracted from Bloomberg. For example:

1. Enter a list of securities to the first column, starting from **A2**. You must add the market sector identifier after the ticker, e.g. **AAPL US Equity**.
2. Place the cursor in the first row, starting from **B1**, and click **Find Fields** in the Bloomberg Ribbon. Select as many fields as you need; click **Apply**.
3. Place the cursor in **A1**. Click **Populate Table Fields** in the Ribbon. Bloomberg data will populate your spreadsheet.

Bloomberg Formulas

Use Bloomberg formulas to populate data in your spreadsheet. Most used formulas are:

- **BDP** (Bloomberg Data Point): Returns data to a single cell in your Excel spreadsheet. This formula contains only one ticker and only one field. Formula syntax: =BDP(Security,Field)
For example: =BDP("IBM US Equity","Px_Last") retrieves the price of the last trade on IBM.
- **BDH** (Bloomberg Data History): Returns the historical data for a security.
Formula syntax: =BDP(Security,Field,Start Date,End Date)
For example: =BDH ("IBM US Equity", "Px_Last", "01/01/01", "12/31/01") retrieves the closing prices on IBM from 01/01/01 to 12/31/01
- **BDS** (Bloomberg Data Set): Returns multi-cell descriptive data to your spreadsheet.
Formula syntax: =BDS (Security,Field)
For example:=BDS ("IBM US Equity", "CIE_DES_BULK") retrieves IBM company's business description.

A more flexible way to perform calculations using Bloomberg formulas is to use Excel cell references instead of entering tickers or field mnemonics. For example, type **IBM US Equity** in cell **A2**, then change the formulas shown above to:

=BDP(A2,"Px_Last")

=BDH(A2,"Px_Last","01/01/01","12/31/01")

=BDS(A2,"CIE_DES_BULK")

Insert Function: use the function builder tool in the Bloomberg Ribbon to create formulas. In the pop-up window, select **Bloomberg** in the **Category** drop-down.

Calculation Override

Click **Scenario Builder** in the Ribbon and follow the guided process to select fields and input your own data.

This feature allows you to input your own data for specific fields to create a "what if" scenario for variables which depend on each other, such as *price* and *yield*. Bloomberg uses its calculation libraries to project the value of a dependent variable based on your input. For example, you can calculate what will be the *Ask Yield to Conversion* price (YLD_CONV_ASK) of a \$90 bond.

Equity Screening

Use the Equity Screening task pane in the Excel Add-In to execute searches previously created using the Bloomberg's equity screening function.

1. In Bloomberg, type EQS **GO**
2. Click **Create Screen**, and enter your screening criteria.
3. On the results screen, click on **Output** drop-down on the top and select Excel. An Excel spreadsheet will open with your results.
4. Alternatively, you may save the screening in Bloomberg and then use the Excel Add-In to retrieve data from Bloomberg:
 - a. Click **Actions** tab > **Save**, and enter a name.
 - b. Open the Excel Add-In, and click **Equity Screening**.
 - c. Keep the **General** Group drop-down > Click **My Screens** > Highlight your screen name > Click **Execute**

PRINT / DOWNLOAD

Click on the **Export** drop-down from the top bar, you can print a screen, email a screen (i.e. Grab Screen), or save a screen as a file or an image.

On some screen, you can click on the **Actions** or **Output** tab above the results and select **Output to Excel**.

Need More Help? Ask Us via www.gsb.stanford.edu/jacksonlibrary/askalibrarian.html