



**Financial Analysis Project: Company Financial Information** draws from financial, market, and industry data. Meaningful research pulls it all together with contextual information about the company’s competitors, its industry, and general economic trends.

## Where to find company and industry information and financials:

1. Company Published information:	Library Resources with Information:
Company’s 2 most recently published annual reports	<i>Mergent Online</i> – has link to annual reports
10K filings	<i>Mergent Online</i> – “EDGAR” link includes 10K
Financial documents: (1) balance sheets (2) income statements (3) statements of cash flow for the 3 most recent years available.	<ul style="list-style-type: none"> <li>• <i>Mergent Online</i> – has links to in-depth company financial documents and data. Click “Company Financials” and select between menu options for “balance sheets”, “cash flow”, “income statements”.</li> <li>• Depending on the financial reporting style in the annual report, these statements may be in depth or summarized in the annual report. <i>Mergent</i> is a reliable source of financials.</li> </ul>
2. Company History & Context:	Library Resources with Information:
Information on the company’s history, products, markets, and competitive environment. This provides business and economic context for some of the financial data which cannot be meaningful in a vacuum – important backdrop for financial analysis.	<i>Mergent Online</i> , <i>Lexis-Nexis (Business)</i> , <i>Business Source Premier</i> , <i>Business and Company Resource Center</i>
3. Research / Reports / Articles:	Library Resources with Information:
A recent research/recommendation article /report from a full-service brokerage firm or respected newsletter.	<i>Business Source Premier</i> , <i>Business &amp; Company Resource Center</i>
Recent articles from the business press	<i>Business Source Premier</i>
4. Company’s Industry Information:	Library Resources with Information:
Standard industry code (SIC) for your company SIC and NAICS codes are needed for industry comparisons.	<i>Mergent Online</i>
Industry averages for all financial ratios calculated in your class project. Use the industry code of your company as research basis.	<ol style="list-style-type: none"> <li>1. “Industry Profiles” within <b><i>Business Source Premier</i></b> database</li> <li>2. <b><i>Industry Norms and Key Business Ratios</i></b>. Dun and Bradstreet. (Ref. 5681 .R25 .I53 - Latest five years kept at the Reference Desk)</li> </ol>

- **Database access:** From the library website ([www.winthrop.edu/dacus](http://www.winthrop.edu/dacus)), select “Databases”, then follow the link into the database of your choice.
- **Off-campus login for databases:** user name = your last name, password = your Winthrop ID number.

### Citing your sources (books, articles, research reports etc):

- Library Research Guides: <http://www2.winthrop.edu/dacus/researchguides/researchguides.htm> – scroll down to “Other Guides” and choose from citation guides (e.g. MLA, Citing Electronic Information)



## Library Materials:

### BOOKS:

Can cover company history, business methods, crisis management / turnaround, market & economic contexts. Also great for business methods – useful in determining whether your chosen company is on a good track or not. ► Find them from the library catalog.

**Useful keyword searches include:** company name, international business, management.

Use “and” to focus your search, use “or” to broaden your search.

### Wildcard “\*” – very powerful search tool in keyword search

One “\*” after “commerce” or “design” brings up for example “commerce” and “commerces”.

- Two “\*” bring up the stem word plus an infinite number of characters attached, e.g.: using “commerc\*\*” the search will bring up “commerce”, “commercial”, “commercialism” etc.
- Keyword phrases: “business”, “France”, etc

**Library Catalog: Limit by material type:** using advanced search, limit to books, VHS, and/or DVD.

**Database: limit to refereed / scholarly articles:** advanced search limit to “academic”.

### Email / Save search results:

library catalog and all databases have built-in choose / save / email feature:

- Save items to folder (some databases call this “mark record”), then
- go to saved/marked-records folder, then → follow through email dialog.

★ Put in your *complete* email address, *including* @winthrop.edu

### Latest Books & Videos Added to the Library:

Start from Library’s website at [www.winthrop.edu/dacus](http://www.winthrop.edu/dacus)

→ “Dacus Online Catalog” → “Helpful Lists” → “New Books Lists” → choose current or other year

→ Choose subjects from the list: → “Marketing” (or any other subject of choice)

### JOURNALS:

Journals contain articles that discuss very specific aspects of companies. For example, a specific strategy, description and analysis of a joint venture, or financial analysis is typically found in journal articles.

#### (a) Current Journals – in print on library shelves:

From Library website: → “Dacus Online Catalog” → “Helpful Lists” → “Current Journals by Subject” → choose.

#### (b) E-journals

**For e-journals:** from Library website → “Databases” → select “E-Journals” → choose subject “Business & Economics”

### DATABASES:

Two database types: **(a)** journal articles and **(b)** analytical data. Business/company databases provide: financial data, stock price history & trends, company profiles, annual reports, industry profiles, SWOT analyses, and links to company websites.

- **To explore database listings:** From Library website: → “Databases” → choose “Databases by Subject”, and then select the subject. (You’ll see “Accounting” and “Business” listed among subjects to choose from. Follow the link and you’ll see the best databases for each topic. From there, click in.
- “Company Information” Research Guide: [www.winthrop.edu/dacus/researchguides/compinfrg.htm](http://www.winthrop.edu/dacus/researchguides/compinfrg.htm) by Bob Gorman. From Library website: → “Research Guides” → “Business” → “Company Information”



## **BUSINESS & COMPANY DATABASES (and some Reference books):**

(adapted from Bob Gorman's "Company Information" Research Guide)

### **DIRECTORY OF COMPANIES:**

1. **Reference USA.** Covers public and private U.S. businesses. (Database --Dacus Library Online)
2. **Business Journal Book of Lists.** (Ref. HC 108 .C33 .B861 - Kept at the Reference Desk). Directory of leading Charlotte-area companies.

### **INVESTMENT INFORMATION:**

3. **Business & Company Resource Center** (Database --Dacus Library Online)  
Articles from business journals & magazines (news, analysis, history, etc), investment & broker research reports, industry overviews, company histories, brand and product information, coverage of professional business associations.
4. **Business Source Premier** ( Database --Dacus Library Online)  
Business-related articles, company profiles, industry profiles, market research, country profiles, SWOT analyses.
5. **Mergent Online** (Database --Dacus Library Online)  
Extensive financial data with customizable report-design & output built-in,, directory information, corporate histories, annual reports, news reports, and links to company website. Covers US and international companies.
6. **Lexis-Nexis Academic** (Database --Dacus Library Online)  
Disclosure reports, company profiles & histories, links to company websites. Find it in Lexis-Nexis Academic --> Business --> Company Financial
7. **Value Line Investment Survey: Ratings and Reports** (Database --Dacus Library Online) Also kept at Reference Desk HG 4501 .V26.  
Investment information and industry surveys (broad categories, good source for industry information).

### **INDUSTRY INFORMATION:**

8. Industry profiles within **Business Source Premier**. Search for a company, then limit search results by "industry profile"
9. **Mergent's Industry Review.** (Ref. HG 4961 .M68 - Latest edition kept at the Reference Desk)  
Financial information, operating data, and ratios on over 6,000 companies arranged by industry group. Provides comparative statistics and rankings within each industry. Some also in *Mergent Online*.
10. **Standard and Poor's Industry Surveys.** (Ref. HC 106.6 .S74 - Latest edition kept at the Reference Desk) – More comprehensive than *Mergent* – information about general industries. There is an index to companies and to industries in the front of each volume. Updated quarterly.
11. **Encyclopedia of American Industries** (Ref. HC 102 .E53 - Kept at the reference Desk, Also included in Business & Company Resource Center – Covers nearly 1,000 manufacturing and service industries.

### **INDUSTRY RATIOS:**

12. **Industry Norms and Key Business Ratios.** Dun and Bradstreet. (Ref. 5681 .R25 .I53 - Latest five years kept at the Reference Desk). Covers 800 industry groups and calculates 14 ratios. Provides common-size analysis and a typical balance sheet for each industry based on the median total assets of the group.
13. **RMA Annual Statement Studies** (Ref. HF 5681 .B2 .R6 - Kept at the Reference Desk).  
Provides 19 ratios for nearly 700 industry groupings.

### **PRODUCT INFORMATION:**

14. **Encyclopedia of Consumer Brands.** 2005. (Ref. HF 5415.3 .E527 2005)  
Extensive coverage on 600 leading brands. Gives product history as well as current marketing and performance information.
15. **ThomasNet.** ( <http://www.thomasnet.com> ) –  
Lists products and services, directory information, brand names and company catalogs.



## STATISTICAL INFORMATION:

16. **Business Rankings Annual.** (Ref. HG 4050 .B88 - Latest edition kept at the Reference Desk, also included in Business & Company Resource Center ) – Contains "Top 10" rankings of companies, products, and activities.
17. **Economic Census** ( <http://www.census.gov/econ/census02/guide/> )  
Extensive national and state statistical data on all aspects of the U.S. economy, including retail and wholesale trade and manufacturing. Updated every 5 years.
18. **Editor and Publisher Market Guide.** (Ref. HF 5905 .E38 - Latest edition kept at the Reference Desk)  
Published annually, provides current information and statistics on cities useful in making marketing decisions. Provides market surveys of U.S. and Canadian cities. Gives information on transportation, population, banks, utilities, industries, retailing and retail outlets, and newspapers.
19. **Manufacturing and Distribution USA.** (Ref. HD 9721 .M3495 - Latest edition at the Reference Desk)  
Extensive statistical information on manufacturing industries, the wholesale trade and the retail sector.
20. **Market Share Reporter.** (Ref. HF 5410 .M35 - Latest edition only, kept at the Reference Desk, also included in *Business & Company Resource Center* (online database)  
Compilation of published market shares. Arranged by product with indexes by company name and SIC codes. Important: NAICS codes supersede SIC codes.
21. **MRI+** (On Dacus Library Online) – Provides extensive marketing and product usage data.
22. **Service Industries USA.** (Ref. HD 9981.1 .S47 - Latest edition kept at the Reference Desk)  
Covers 150 service industries and over 4,000 companies.
23. **Survey of Buying Power.** (August issue of Sales and Marketing Management magazine)  
Contains information on all SMSA's in the U.S. and covers population, households, effective buying income (EBI), retail sales, and buying power index (BPI). Includes national and regional summaries and metropolitan, county, and city market rankings.

## HISTORICAL INFORMATION:

24. **International Directory of Company Histories.** (Ref. HD 2721 .I58, also included in Business & Company Resource Center )  
Excellent multivolume set that provides detailed historical information on the development of the world's largest companies. A bibliography is found at the end of each entry.
25. **Mergent Online.** (Database – Dacus Library Online)  
Includes a corporate history for each company listed.

## ANNUAL REPORTS:

26. **The black filing cabinets next to the Interlibrary Loan office** wall nearest the DOC terminals contain the most recent five years of annual reports of selected companies (arranged by company name.) Many annual reports are also available on the Internet. To find these, search your favorite Internet Search Engine by company name.
27. **AnnualReports.com** ( <http://www.annualreports.com> ) – Over 2000 annual reports online.
28. **Mergent Online** (Database -- Dacus Library Online) – Current and also previous annual reports.

## INDEXES / DATABASES WITH BUSINESS ARTICLES:

1. **Business & Company Resource Center** (Database -- Dacus Library Online)  
Provides access to business-related articles from 1980 to the present. Many of the articles are full-text.
2. **Business Source Premier** (Database -- Dacus Library Online)  
Provides full-text from over 8,000 business journals, trade magazines, and other business resources
3. **LexisNexis Academic** (Database -- Dacus Library Online)  
Full-text of newspapers and other business resources.
4. **Regional Business News** (Database -- Dacus Library Online)  
Full-text of articles from 75 business journals, newspapers, and newlines covering all metropolitan and rural areas within the U.S.

## DATABASES WITH BUSINESS DATA:

1. Mergent Online: The best place to start for company overview and financials
2. Lexis-Nexis Academic → Business → choose various types of reporting for detailed business data.