



MERGENT

# InvestorEdge™

## Quick Tips

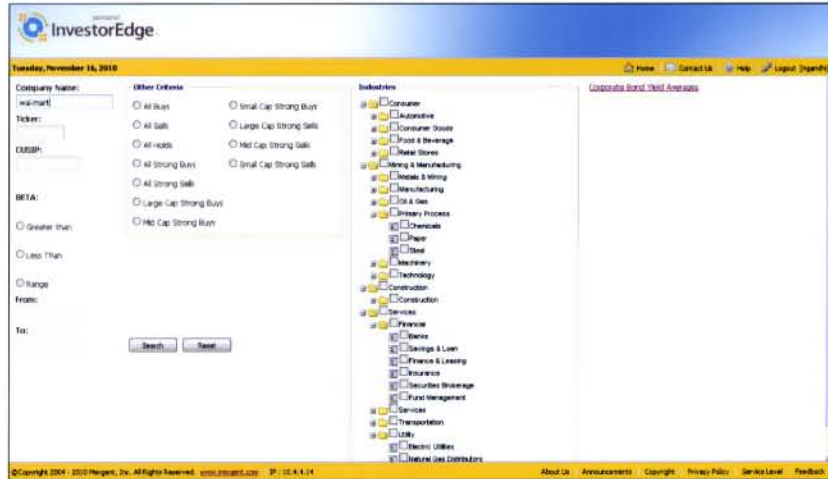
### What should I keep in mind when looking up a stock by company name in Mergent InvestorEdge?

Be careful how you type in the company's name. If you type out the entire company name, you must spell it exactly as it appears in the database. Be sure to include the hyphen in company names like "Wal-mart" or "Coca-Cola".

You can also try typing just a portion of the name such as "Wal" or "Coca" first.

If you are unsure of the company's full name, you may also try the wildcard (\*) option. For example, typing simply "micro" in the company search will return only results for companies whose names begin with "micro".

Placing an asterisk (\*) in front of the term "micro" will return results for companies in which "micro" may appear at the beginning, middle, or end of their company name.

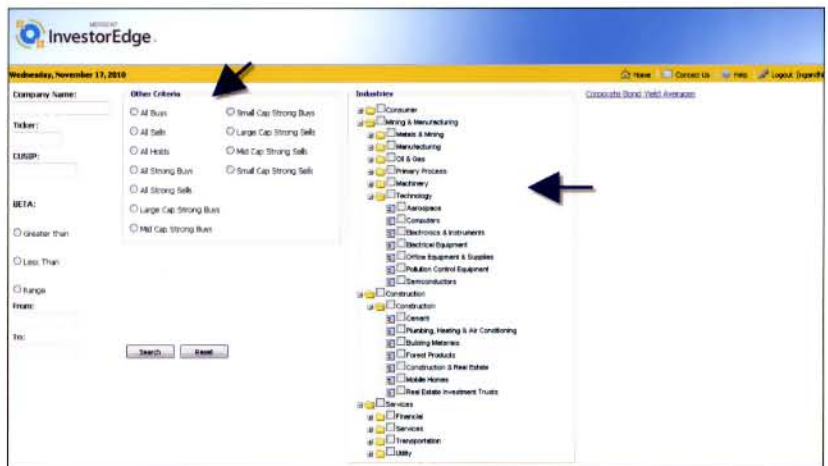


### What criteria other than company/ stock name can I use to search in Mergent InvestorEdge?

Mergent InvestorEdge has different screening options to quickly obtain the data you are looking for. You may also use more than one option at a time to obtain more specific search results

#### Search by Recommendation:

You have the option to **search by the recommendation** provided in our Equity Reports (Strong Buy, Buy, Hold, Sell, or Strong Sell) for every company covered in our universe. With this search option you can also narrow your search by market capitalization ranking (Large, Mid, or Small Cap).



#### Other Criteria

- All Buys
- All Sells
- All Holds
- All Strong Buys
- All Strong Sells
- Large Cap Strong Buys
- Mid Cap Strong Buys
- Small Cap Strong Buys
- Large Cap Strong Sells
- Mid Cap Strong Sells
- Small Cap Strong Sells

#### Search by Industry:

Another search feature you may find useful when building your portfolio is our **Industry Search** option. Use the expandable "Industry tree" to select major industry categories (or choose from the more specific sub-categories within them) and retrieve a list of companies which operate within that industry or industries. Similar to search by recommendation, the industry search gives you greater control over your searches, helps save time and find companies relevant to your specific investment interests.

#### Industries

- Consumer
- Mining & Manufacturing
- Metals & Mining
- Manufacturing
- Oil & Gas
- Primary Process
- Machinery
- Technology
  - Aerospace
  - Computers
  - Electronics & Instruments
  - Electrical Equipment
  - Office Equipment & Supplies
  - Pollution Control Equipment
  - Semiconductors
- Construction
- Services



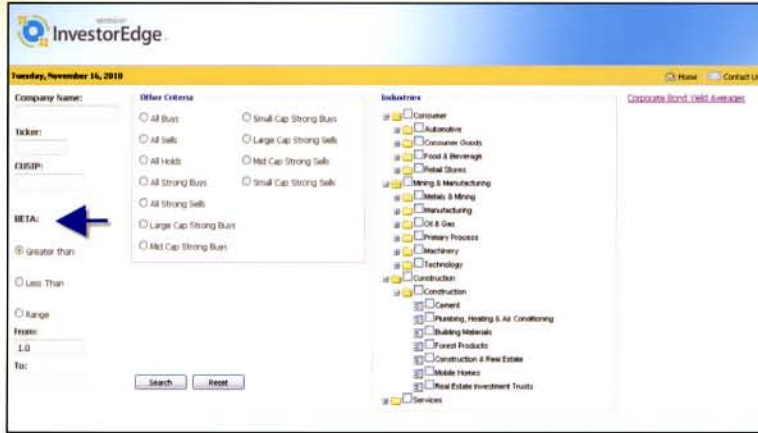
**If you need further assistance or have any questions, please call our Technical Support Help line at 1-800-955-8080 between 8 AM and 5 PM (Eastern). You can also email us at [technicalsupport@mergent.com](mailto:technicalsupport@mergent.com)**



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### What is Beta and what is the Beta search used for?

In finance, the **Beta** ( $\beta$ ) of a stock is a number that describes the relationship of that stock's returns with that of the financial market as a whole. By definition, the market itself has a beta of 1.0, and individual stocks are ranked according to how much they deviate from the macro market. A stock whose returns vary more than the market's returns over time may have a beta whose absolute value is greater than 1.0. A stock whose returns vary less than the market's returns likely has a beta with an absolute value less than 1.0.

A stock with a beta of 2 has returns that change, on average, by twice the magnitude of the overall market's returns. Beta can also be negative, meaning the stock's returns tend to move in the opposite direction of the market's returns. A stock with a beta of -3 would see its return decline 9% (on average) when the market's return goes up 3%, and would see its return climb 9% (on average) if the market's return falls by 3%.

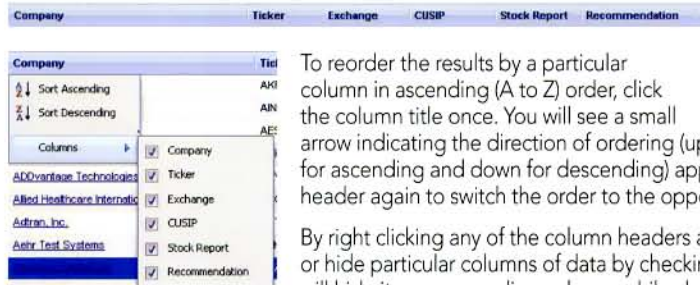
The **Beta Search feature** in InvestorEdge gives you the option of looking

for companies whose stocks carry a particular Beta or a range of Beta values. Searching using the Beta function is useful for investors who are interested in diversifying their stock portfolio to balance out the risk and return variables in their investments.

### Some pointers for navigating search results:

**Scrolling through Pages** – The bar at the bottom of the search results page will help you navigate through the pages. The right hand side of this bar shows the total number of returned results and the number currently being displayed.


**Organizing Search Results** – To make searching through a list of companies easier, use the headers at the top of the search results table labeled: Company Name, Ticker, Exchange, CUSIP, or, where applicable, Recommendation.

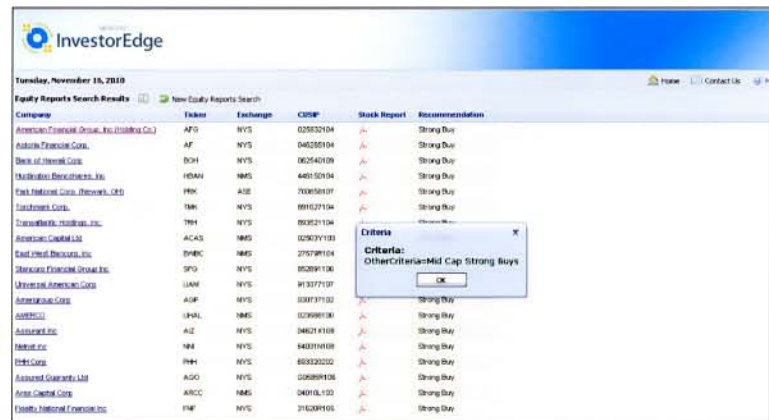


To reorder the results by a particular column in ascending (A to Z) order, click the column title once. You will see a small arrow indicating the direction of ordering (up for ascending and down for descending) appear next to the column title by which you are organizing the results. Click the column header again to switch the order to the opposite direction.

By right clicking any of the column headers and hovering your mouse over the "Column" option in the list, you may opt to display or hide particular columns of data by checking and unchecking the boxes next to each of the column titles. Unchecking the box will hide its corresponding column, while checking a box will toggle the column visible again.

Finally, by holding the left mouse button down over a column header you can reorganize the order in which the columns display by dragging the column title to the left or right.

**Criteria QuickLook** – To recall your search criteria, locate this icon  next to [New Equity Reports Search](#). Hovering over this icon will open a drop-down box that will show you the criteria you used for this particular search. Similarly, you may click on the icon which will cause a pop-up box to display in the center of your screen with these details as well.



**If you need further assistance or have any questions, please call our Technical Support Help line at 1-800-955-8080 between 8 AM and 5 PM (Eastern). You can also email us at [technicalsupport@mergent.com](mailto:technicalsupport@mergent.com)**



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