Intended Learning Outcomes

By the end of this session, you will benefit by being able to:

1. Navigate databases for:
   - Company background & profile (*Vault, Business Source Premier, Passport*)
   - Company financials (*Factiva, Bloomberg*)
   - Company analyst reports & news (*Bloomberg, Factiva*)
   - Company statistics (*Statista*)

2. Name sources to get started with industry & country analysis (*Passport, Statista, Gartner*)
Library Guide: MGMT 4250

http://libguides.ust.hk/mgmt4250
Company Research?

Where would you start?
Company website

Library books

Google

Wikipedia
The Free Encyclopedia

LinkedIn

Facebook
Have you used these databases before?

Vault
Gartner
Business Source Premier
Bloomberg
Passport
Factiva
Statista
Find Company Background & Profiles
Use **Vault** for Company Information

- Features a collection of company, industry, & career guides
- Covers a wide range of industries
- Access: [https://lbdiscover.ust.hk/bib/991004813159703412](https://lbdiscover.ust.hk/bib/991004813159703412)
Use **Business Source Premier** for Company Profiles

- Provides company profiles of the world’s largest 10,000 companies
- Access: [https://lbdiscover.ust.hk/bib/991000314459703412](https://lbdiscover.ust.hk/bib/991000314459703412)
Use **Passport** for Company Profiles & Analysis

Global market research database
- Provides statistics & analysis on countries, industries, companies, & consumers
- Features 115 million internationally comparable statistics & 25,000 market research reports
- Provides insights of the global business & economic environment in 210 countries
- Click [here](https://lbdiscover.ust.hk/bib/991003622279703412) to view a company report on Apple Inc.
- Access: [https://lbdiscover.ust.hk/bib/991003622279703412](https://lbdiscover.ust.hk/bib/991003622279703412)
Find Company Financials
Use **Factiva** for Company Details

- News
- Key developments
- Peer comparison
- Financial results
- Ratio comparison reports, etc.

Access: [https://lbdiscover.ust.hk/bib/991004767649703412](https://lbdiscover.ust.hk/bib/991004767649703412)
Use Bloomberg for Financial Analysis

• **On campus access only**: Use Bloomberg stations in Library’s Information Commons (G/F); reserve a station online using the [library booking system](#).

• **How to log on to Bloomberg?**
  Watch [Tutorial 1](#) of Bloomberg Series @ HKUST Library

• **How to find the market capitalization and financial ratios of a company?**
  Watch [Tutorial 4](#) of Bloomberg Series @ HKUST Library
  - Type FA & hit the GO key
Use **Bloomberg** for Peer Comparison

- **How to get peer comparison or comparables analysis**
  - Search & choose the security
  - Type RV & hit the GO key

**RV = Relative Valuation**, which provides peer group relative value analysis. Compare your company to competitors using Bloomberg's peer list, GICS industry or sub-industry lists, or create your own unique peer list.
Find Company Analyst Reports & Recommendations
Search for Analyst Reports in Bloomberg

• In Bloomberg, type the company name, e.g. Cathay Pacific
• Select the company's ticker symbol: 293 HK EQUITY
• Type BRC & hit the GO key for analyst reports (BRC = Broker Research Reports by Company)
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For sample analyst reports, click [here](#) to view
Search for Analyst Recommendations in Bloomberg

- **Type ANR & hit the GO key** for analyst recommendations.
- **Consensus Rating** = The current average rating of all analysts who updated within the last 12 months.
  - 5 = Strong buy
  - 4 = Buy
  - 3 = Hold
  - 2 = Sell
  - 1 = Strong sell
Need help with using Bloomberg?

• Visit the Database Guide on Bloomberg

• Schedule a coaching session with a business librarian
  o Celia Cheung (lbcelia@ust.hk)
  o Kevin Ho (lbkevin@ust.hk)
Use **Factiva** for News Articles

A huge news article & business information database that covers over 32,000 sources from 200 countries in 28 languages

Access: [https://lbdiscover.ust.hk/bib/991012615856803412](https://lbdiscover.ust.hk/bib/991012615856803412)
Use **Factiva** for News Articles

**In-Class Activity**

Find news about:

- Starbucks Corporation
- Agorize, OR
- A company that interests you
Use Statista for Statistics

• Provides access to over a million statistics & facts on selected topics, industries, consumer markets, companies, etc.
• Also includes Industry Reports, Digital Market Outlook & Forecasts

In-Class Activity
Find statistics about Starbucks
Find Private Company Information

• A private company is not traded on any stock exchange
• It does not have the same legal requirements as a public company to disclose information about itself to the public, so private company information is often hard to find

Some suggestions:
✓ Try searching Factiva for news articles, which might mention the key financial items (e.g. revenue) & operating performance of some private companies
✓ Visit the company website
Find Private Company Information

Some suggestions *(cont’d)*:

✔ **Run qualitative interviews**

Different modes:

- Face-to-face Interviews
- Telephone Interviews
- Skype Interviews
- Instant Messenger Interviews *(WhatsApp, WeChat, etc.)*
- Email Interviews

Duke University: [Tipsheet – Qualitative Interviews](#)
Environmental Scanning

• Identify external opportunities & threats & their effect on the company

Image source: https://slideplayer.com/slide/3588812/
# Find Industry & Country Information

## Industry Information

**Suggested Sources:**
http://libguides.ust.hk/mgmt4250/industry

**In-Class Activity**

Use **Passport** & **Statista** to find information about the hot drinks industry in Asia:
- Market sizes
- Key players
- Market outlook

## Country Information

**Suggested Sources:**
http://libguides.ust.hk/mgmt4250/country

- Country Basics
- Country Statistics
- Country Competitiveness
- Country Reports
Gartner

• Provides access to over 110,000 research documents across 1,200 topics covering all aspects of technology and telecommunications, including hardware, software and systems, services, IT management, market data and forecasts and vertical industry issues.

• Key market research publications include:
  ✓ Market Quadrants
  ✓ Critical Capabilities
  ✓ Hype Cycles
Schedule a Required Research Consultation

1) ~30 mins long (Sept 20 & 23)

2) Book online at https://doodle.com/poll/ur9e8bgr4yg93reu

3) Fill out your “Research Plan” (Section 1)
   • Email it to Celia (lbcelia@ust.hk) and cc Prof Choi (jnchoi@ust.hk) two days before your research consultation
Need Help?

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WhatsApp: 9701 1055