1. Find Companies/Securities

Find a company using the autocomplete suggestion:

Type the name of a company, **Progress Software**.

Note the suggestions for securities. What is the top suggestion for this security?

Find a company using the **<HELP>** key.

Type the name of a company, **Time Warner Inc**, and hit the green **<HELP>** key.

Notice the many results and their tickers/identifiers.

Type *(Do not use the mouse!)* the ticker and hit the market and then go key. i.e. **TWX UN <EQUITY> <GO>**. This will take you to the main menu screen for Time Warner’s stock.

   Note: If from the HELP results screen you used the mouse to select **TWX UN** then you will likely see the company description page. It is usually advisable to key in the tickers and commands as they will take you directly to the desired menu or screen. It will also help you to memorize your favorite commands.

After entering **TWX UN <EQUITY> <GO>** you should be at the main equity menu for Time Warner Inc.

Enter the function code for a company description (**DES**) and hit **<GO>**.

Go to a function with one command line.

Now, how do you go to the company description page for **Alliant Energy** (ticker is **LNT**) with **one command line**?

Hint: ticker **<market key>function code<go>**
2. Identifiers and Command Lines

What goes into an identifier?

Did you notice the 2-letter market code that follows the ticker symbol? Notice we didn’t enter it in the Alliant Energy example, but it didn’t matter? Bloomberg will default to using the ticker for the country you specify in your preferences. Try it.

Enter BAS <EQUITY> DES <GO>. You will see information on Basic Energy Services, primary exchange is in the United States.

Now enter BAS GY <EQUITY> DES <GO>. You will see information on BASF SE, primary exchange is XETRA.

Note: GY is the code for the exchange and GR is the composite code for BASF. See the full list of exchanges and composite codes on the library guide or EPRX <GO> in Bloomberg.

Find a company by screening for it.

Press the yellow market sector key <EQUITY> <GO>.

Notice the code to look-up a company, SECF. This is the security finder and will search for equities, debt, commodities, indices, and other securities.

Enter SECF <GO> and in the amber search box at the top, type Teleflex.

Use the yellow boxes or drop-down menu to filter results to only look at equities. Notice you can also limit to types of equities, country of exchange, status, etc. Are there any clues that you see the might indicate one security is the default?
3. Find Function Codes

To find codes for either functions or securities you can use several methods.

Find function codes by browsing:

Go to the main equity menu for Teleflex Inc using the information you found in the security finder (the ticker), hitting the yellow market key for equities, and the green Go key (TFX <EQUITY> <GO>)

- Explore the various sections such as Company Analysis and Charting. What are some of the functions you find?
- Find the function code for intraday price chart. (Hint: look for all charts/graphs) What is it? Go to this page and leave it up for later.
- In a different window, find the function code for beta. What is it? View the beta screen for Teleflex and leave it up for later.

In the beta screen, change the relative index (Hint: Look in the yellow boxes at the top of the screen) to the S&P 500 Healthcare Index (S5HLTH <INDEX>). Notice the graph changes.

This is important because anywhere you see those yellow boxes are places you can change what you are viewing. You can change the security you are looking at or adjust other criteria such as date range.

Find function codes by using the <HELP> key:

In a different window, find the function codes relating to volatility using the <HELP> key by typing volatility and hitting the green <HELP> key (VOLATILITY <HELP> ).

From the Help results under Functions, pick volatility surface option (OVDV) and apply it to Teleflex with one command line. (Hint: use Teleflex’s ticker, TFX, the <EQUITY> market key, function code, and <GO> key.)

Use the <HELP> key to understand what you are looking at.

Now compare this with the autocomplete feature. Start typing in volatility in the command line again. Notice that Bloomberg suggests a number of options including functions and securities. Is OVDV in there?
4. Grabbing and Saving

Copy screens:

Sometimes it is helpful to have a screenshot of a Bloomberg chart or graph or to export data to Excel. There are a few options to do this:

- On the **Teleflex beta** window opened earlier, click the “copy” option on the scatter plot to copy the image. This will copy just the scatterplot. Paste it into Excel.

- Now get an image of the entire screen, not just the plot area. Type **GRAB<GO>** and follow the prompts to email a screen shot to yourself.

- Alternatively you can save the entire screenshot as a file buy using the **Take a Window Screenshot** option in the top right menubar. This is useful if you have multiple screens you want to save.

- Go to the Intraday Price Chart opened earlier, right click on the graph and notice your options for downloading the image or data to the clipboard. Do both and paste into Excel.

- What other potential options are there on this screen for downloading?
5. League Tables (underwriter and legal rankings)

Find the code for league tables using the autocomplete feature by typing in league in the command line.

Notice the different suggestions. Select the one for league tables (LEAG). This will bring us to the financial underwriters and legal counsel for debt and equity offerings.

Select the option for U.S Equity Offerings and load the table.

To adjust the results:

1. Go to 1) Actions > 3) Edit Criteria.
2. Edit “Equity Offering Type” to only include IPOs.
3. Update the table.

Notice the various tabs and options such as exporting the rankings or the securities into Excel.

Take a look at an individual deal (Hint: notice the different tabs and the one that says 14 Deals).

Use the mouse to get more information on a specific deal by right clicking on it and selecting CACX (corporate action details.). This will give you source documents and other details such as what other firms were involved in the deal.

Can you find the prospectus for that offering? If not, how would you go about finding out if Bloomberg has it? (Hint: Use the HELP key to search for the function.)

FYI, You can also do a targeted search for IPOs by using the IPO command code—which is, oddly enough, IPO 😊
6. Mergers & Acquisitions

Go to <EQUITY><GO>.
Look under the Capital Markets section of the menu. Notice the various commands for tracking deals.

DMON (Deal Monitor) is a one-stop screen for both equity offerings, debt offerings, and M&A activity.

To view the M&A landscape, search for specific deals, or find M&A league tables, go to the Mergers & Acquisitions page.

Notice that there are some pre-made templates covering deals in specific sectors and geographic regions.

Use the Advanced Search function to create a custom search (Hint: Look at option 91 in the red menubar).

In the advanced search, set the date range last 12 months, announced deals.

Limit the sector to Media. (You may need to use the mouse to expand the various sectors and select Media.)

Save the search, title it a unique name, and give it a shortcut code.

Run the search by typing MA your shortcut code <GO>.
You can run this search on this login at any time without having to recreate the search criteria. This is one way you are able to customize your Bloomberg experience.
Economic releases can have major effects on a market. Many Bloomberg users set up alerts for upcoming economic releases. Go to the Economic Release calendar ECO<GO>.

Find New Home Sales MoM on this release calendar to get more details
(Hint: Adjust the date range to go back further in time if necessary. You can also use the mouse to sort the columns alphabetically. Note the tiny scroll bar on the right).

Note:
- If you type the number option for this release you will get a popup window asking you to enter in a code for more information. In this case, type 13 <GO> for ECOS-economist estimates.
- If you used the mouse to select New Home Sales, then note at the top of the screen option 12 to get to the economist estimates.

To compare how the economist’s estimates to the actual releases, enter the menu option for an analyst (You can do this for multiple analysts at the same time.)

You can also see how an analyst does regarding specific companies by looking a [ticker] <EQUITY> ANR <GO>.
8. News & Industry

News

The news stories on Bloomberg are one of the most popular features. There are a number of ways to view news stories on Bloomberg. Take a look at the bond news stories (Use the autocomplete to see suggestions.)

Notice the code for the top bond news stories is TOP BON, for the top currency stories TOP FX, and for top equity stories is TOP STK. For just the general top news stories you can enter TOP <GO> or hit the green <NEWS> key.

Select a story and download it (check the Actions button in the red menubar). Notice that there are many sources of news and you can filter your results.

NLRT <GO> will help you set up your news alerts and MAG <GO> will take you to Bloomberg Markets magazine.

Briefs

Bloomberg publishes weekly briefs in specific areas such as hedge funds, mergers, leveraged finance, PE, and more. To access these, BRIE <GO> (Mmmmm, brie.)

Click on one of the newsletters to see their coverage.

Industry

Enter BI <GO>. This will bring you to Bloomberg’s industry research section where you can find industry primer, news, companies, market share, and more.

Note the Bloomberg code for each industry. You can use these codes to go directly to that industry section at any time. e.g. To view the biotech space, BI BIOTG <GO>, or to view the airline space BI AIRLN <GO>. 
9. Advanced Functions

For those who think they may be using Bloomberg for more advanced research, it is a good idea to become familiar with some of the additional features of the system including, but not limited to:

Bloomberg Launchpad (BLP <GO>) allows you to aggregate a variety of graphs, tables, and other information in one screen without having to navigate between panels. This is something that is in heavy use by those who use Bloomberg regularly.

and...

Bloomberg Excel API allows you to access Bloomberg data via Excel. You can download ready-made spreadsheets from XLTP <GO> or you can create your own. More information for developers is available at BBXL <GO> *Please note that our contract stipulates data cannot be removed from the terminal.*

and...

Bloomberg Assessment Test (BAT) is a proctored test of your aptitude for math and finance. The results are used as a recruiting tool. Recruiters can look at your anonymous scores and request to contact you if your skills fit their needs. To sign up go to: https://talentsearch.bloomberginstitute.com/test_sessions/available

BHL <GO> (Bloomberg Help and Learning) has training modules (Getting Started With Bloomberg) on how to use some of the market specific and advanced features of the system. FFM <GO> (Functions for the Market) provides ideas on how to analyze current event affecting the market.