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GUIDE TO MERGENT ONLINE



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About Mergent Online

- Mergent Online is a database of information about American and international private and publicly traded companies, bonds, as well as economic and industry reports. It is accessible from the library's [homepage](#) – click on **Statistics** to locate the link to **Mergent Online**.
- Mergent contains information about 15,000 active and inactive U.S. public companies; 20,000 international active and inactive public companies; and over 1 million private company records for U.S. and international companies.
- For corporate and financial information with a specifically Canadian focus, also try **FP Infomart**. The library has access to several other resources from Mergent, including **Mergent Intellect**, **Mergent WebReports**, and **Key Business Ratios**.

Basic Search

With Mergent's *Basic Search* function, you can search for a specific company or generate a list of companies within an industry. Instructions on how to use each search field are listed below:

Company Search

Use the *Company Search* bar to search for a specific company by name or ticker symbol:

1. Select the company database(s) you wish to search (see **Notes** at the end of this guide for descriptions of each).
2. Search by company name or ticker symbol in the box provided. As you are typing, a drop down box will appear below with companies matching your search.
3. If the intended company is listed, click the company name and you will be directed to the company's details page. If there is no match in this box, continue with your search and select **Go** to complete.

A screenshot of the Mergent Online search interface. It shows a list of search criteria with checkboxes: USA Company Database (Active), USA Company Database (Inactive), International Company Database (Active), International Company Database (Inactive), and D&B Private Company Database. Below the list is a search bar with the placeholder text "Company Search - Enter symbol or Company Name ^" and a "Go" button.

D&B 20 Million Plus Private Company Search

Use the *20 Million Plus Private Company Search* to search for U.S., Canadian, and international private companies. Check the "Search for an additional private companies below" box to search by company name or ticker symbol, country, or by company Duns number (see **Notes**).

A screenshot of the "D&B 20 Million Plus Private Company Search" interface. It features a header with the search type, a checkbox for "Search for an additional private companies below", and three search fields: "Company Search - Enter symbol or Company Name ^", "Country", and "Duns Number". Each field has a "Go" button next to it.

Classification Search

To search for companies by industry, use the *Classification Search* tool:

1. To search by industry codes, first select Primary SIC, Primary NAICS, or MIC (Mergent Industry Code).
2. Type in the industry code, or select **use code lookup** to search for a code (a pop up window will open with a list of codes).
3. If you wish to further narrow your search, select which Index, Exchange, and/or Country to narrow by. If there is no specific industry, a search may also be done using only these fields.
4. Click **Search** to complete.

Classification Search - Select one of the criteria

Primary SIC
 Primary NAICS
 MIC (Mergent Industry Code)

([use code lookup...](#))

Index

Exchange

Country

Note: To search for a range of codes, searching for a broad industry sector will search for any sub-sectors (e.g., “44” will find any companies within the NAICS range of 44 to 448320). You may also search for multiple industry codes by separating each with a comma and a space (e.g., “445, 446”).

Advanced Search

The *Advanced Search* tab is useful when you need to find a group of companies that fulfill a list of set criteria.

Select one of the following criteria below to create your screen: ([Load a previous Search](#))

1) Select Target Universe

USA Company Database (Active) International Company Database (Active)
 USA Company Database (Inactive) International Company Database (Inactive)
 D&B Private Company Database

* indicates searchable in private database
^ require minimum 3-character word to search (use * for partial text search)

Country Profile
Looking for country Statistical Data with Country Map?
Select a country from the list:

Categories

Corporate Information	Executives	Financials	Industry Codes	Pricing	Ratios	Textual Search	Index
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Search Criteria

Select All Criteria
Reset

Please click the "submit" button to execute search

Company Name **
 State *
 City *
 Zip Code *
 Year Incorporated/Founded *
 Stock Exchange *
 State of Incorporation *
 Country of Incorporation *

Country of Operations
 Number of Employees *
 Number of Shareholders
 Legal Counsel
 Subsidiary ^
 Transfer Agent
 Auditor

Criteria List

x	Country of Incorporation *	Canada	>> submit	and	Save / View
x	City *	Contains Halifax	>> submit	and	Save / View
x	Total Assets *	Greater than or Equals 1000000	Latest >> submit	and	Save / View
x	Primary NAIC *	Use NAIC Lookup 21	>> submit	and	Save / View

1. Select the **Target Universe(s)** to be searched.
2. Select a **Category** (e.g., Corporate Information, Executives, Financials, etc.).
3. From within these categories, select and add various **Search Criteria** (click the + sign).

- When your search criteria are selected, they will be added to the **Criteria List**. To remove criteria from the list, click the **X** beside individual items.
- Click **>>submit** to view the number of matches for each of your criteria, or click **View** to be taken to the results page.

Working with Your Search Results

The results page provides you with a list of companies that satisfy your search criteria. Here you are able to view the company names, SIC codes, the exchange they are traded on, ticker symbol, if the company is active or inactive, country, and sector.

2 Company Analysis List (500 limit)

Basic Search | **Advanced Search** | D&B 20 M Plus Private Company Search | Executive Search | Government Filings | Report Search | Ownership | Bond Search | Economics

Download | **My Mergent Tools** **3**

Advanced Search > Search Results

Criteria 1 | **Criteria 2** | Criteria 3 | Criteria 4

USA Company Database (Active): No International Company Database (Active): Yes
 USA Company Database (Inactive): No International Company Database (Inactive): No
 Private Company Database: No

Corporate Information > Country of Incorporation = CAN AND
 Corporate Information > City contains Halifax AND
 Financials > Total Assets >= 1000000 In Latest AND
 Industry Codes > Primary NAIC starts with 21 AND

Click [here](#) to show results for all criteria searched

11 Companies Found
 Displaying 1-11

(ALL)	Company Name	SIC Code	Exchange	Ticker	Active/Inactive	Country	Sector
<input type="checkbox"/>	Corridor Resources, Inc.	1321	TSX	CDH	Active	Canada	Public
<input type="checkbox"/>	Elcora Resources Corp	1499	TVX	ERA	Active	Canada	Public
<input type="checkbox"/>	Erdene Resource Development Corp	1061	TSX	ERD	Active	Canada	Public
<input type="checkbox"/>	Frontline Gold Corp.	1041	TVX	FGC	Active	Canada	Public
<input type="checkbox"/>	GoGold Resources Inc.	1041	TSX	GGD	Active	Canada	Public
<input type="checkbox"/>	Merrex Gold Inc.	1011	TVX	MXI	Active	Canada	Public
<input type="checkbox"/>	Muskirat Minerals Inc.	1099			Active	Canada	Public
<input type="checkbox"/>	Namibia Rare Earths Inc.	1081	TSX	NRE	Active	Canada	Public
<input type="checkbox"/>	NSGold Corp	1041	TVX	NSX	Active	Canada	Public
<input type="checkbox"/>	Stockport Exploration Inc.	1021	TSX	SPT	Active	Canada	Public
<input type="checkbox"/>	Ucore Rare Metals Inc.	1081	TVX	UCU	Active	Canada	Public

1. To work with your search results, select the name of an individual company to view their company details page, or check the boxes of the companies you wish to further analyze.

2. Use the **Company Analysis List (500 limit)** drop down menu in the top left hand corner to add these companies to your **Company Analysis List**.

- **Add Currently Selected Companies** (if you have manually selected companies)
- **Add All Companies** (note the 500 company limit)
- Add a range of companies (e.g., **Add Company 1 to 100**)

Company Analysis List (500 limit) ▾

- Company Analysis List (500 limit)
- Add Currently Selected Companies
- Add All Companies
- Add Company 1 to 100
- Add Company 101 to 200
- Add Company 201 to 300
- Add Company 301 to 400
- Add Company 401 to 500
- Add Company 501 to 600
- Add Company 601 to 700
- Add Company 701 to 799

3. Locate the **Company Analysis List** under **My Mergent Tools** on the right-hand side of the page. You can see how many companies have been added to this list. Selecting **Company Analysis List** will open a pop-up window that allows for the creation of either a *Multiple Company Report* or a *Company Comparison Report*. See instructions below.

Download | My Mergent Tools ▾

- Company Analysis List (11/500)
- Executive List (0/500)
- 20M+ Private Company List (0/500)
- Company Alerts (0)
- Executive Alerts (0)

Company Report Generator

Multiple Company Report (default report format)

- To add individual companies to the **Multiple Company Report**, select the company and then press the single right arrow button . To add all companies, press the double right arrow button .
- Click the **+** button beside the Data item categories to reveal the **Data Items**. Select items and add to the **Report Items** list with the arrow buttons.
- Finally, **select a format** for the report (e.g., PDF, Excel, etc.) and click **Create Multiple Company Report**. The generated report will download to your computer in the format you selected.

Company Comparison Report

- Select **Company Comparison Report** to change report screens and complete *Step 1* as indicated above.
- Select Report type: **List By Item** or **List by Company**
- Click the **+** button beside the Data item categories to reveal the **Data Items**. Select items and add to the **Report Items** list with the arrow buttons. Note that there is a limit of 30 items.
- Select years to include and, if desired, **Include Average** for the companies.
- Finally, **select a format** for the report (e.g., PDF, Excel, etc.) and click **Create Report**. The generated report will download to your computer in the format you selected.

Company Details Pages

Tim Hortons, Inc. (NYS: THI) | to Company Analysis List | Recent Companies

Address: 874 Sinclair Road, Oakville, L6K 2Y1 Canada | Phone: 905 845-6511 | Company Website: www.timhortons.com

Incorporated: May 1964
Reincorporated: Canada
CUSIP: 88706M10
Auditor: PricewaterhouseCoopers LLP
Legal Counsel: Akin Gump Strauss Hauer & Feld LLP, Washington, D.C.
Transfer Agent: Computershare Trust Company of Canada, Toronto, Ontario, Canada
Country: Canada

Sector: Hotels, Restaurants & Travel
Industry: Eating places (SIC 5812)
Industry: Limited-Service Restaurants (NAICS 722211)
Number of Employees: 2,381 (Approximate Full-Time as of 12/29/2013)
Number of Shareholders: 43,402 (approx. record) (as of 02/21/2014)

Market Cap: 10,211,047,840
Revenue: 3,364,606,000
Net Income: 429,121,000
Dividend: 1.22 Dividend Yield: 1.5869
EPS Basic: 3.05 EPS Diluted: 3.03
PE Ratio: 27.1661

Company Details | Executives | Ownership | Company Financials | Equity Pricing | Reports | Filings | News | Competitors | Report Builder

Synopsis | Highlights | History | Business | Property | Subsidiaries | Long Term Debt | Capital Stock | Earnings Estimates
Business Segments

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Business Summary

Tim Hortons is a restaurant chain. Co.'s menu includes coffee, espresso-based hot and cold drinks (including lattes, cappuccinos and espresso shots), iced cappuccinos, steamed teas, cold beverages, fruit smoothies, home-style soups, chili, grilled Panini and sandwiches, wraps, yogurt and berries, oatmeal, breakfast sandwiches and wraps, and baked goods, including donuts, Timbits®, bagels, muffins, cookies, croissants, Danishes, pastries and several more. Co. has two segments: the Canadian and U.S. business units. As of Dec 29 2013, the number of Co.'s restaurants, both standard and non-standard locations across Canada, the U.S. and the Gulf Cooperation Council, totaled 4,485.

Key Executives

Marc Cairn	Age	Salary
President, Chief Executive Officer	60	910,000
Cynthia Devine	Age	Salary
Chief Financial Officer	49	397,393
David Clanachan	Age	Salary
Chief Operating	52	397,393

Each company within Mergent has its own page, which can be accessed by clicking on a company's hyperlinked name. Company summary information is found at the top of all pages, followed by more in-depth information organized under the blue tabs and their sub-pages.

Ownership

Select the Ownership tab for a list of the top 25 institutions that hold stock in the company. Also, view stock holdings by insiders and insider trades.

Company Financials

Use the Company Financials tab for up to 15 years of detailed yearly/quarterly company financial data in a table format, including balance sheet, income statement, retained earnings, and cash flow. As reported, preliminary, standardized, and restated financials are provided. Also included are company ratios and analyses of its income statement, balance sheet, and ratios.

Equity Pricing

Click on the Equity Pricing Tab to display information in Chart or Report format. Use the controls to reformat the chart to show different time periods, frequencies, or comparisons with other companies. To view information in a table format, click on the Report option.

Reports and Report Builder

Click on the Reports Tab to view and/or download Annual Reports, Industry Reports, Equity Reports, Mergent Reports, and Portraits.

To create a customized report for a company, select the Report Builder Tab. Choose from Custom Reports, Report Wizard, or Comparison Reports. Build Custom Reports by selecting from a list of data items to include. Report Wizard allows you to select from a list of pre-defined reports. Comparison Reports allows you to compare the selected company to a number of companies in the same industry or to a custom group of companies (see *Company Comparison Report Steps 2-5*, above for further instructions).

Competitors and Competitor News

Select the Competitors Tab to view a list of the company's top 25 industry competitors ranked by total revenue. Switch between Public USA, Public Global, and Private lists of competitors by clicking the links at the top of the currently displayed competitor list. The list may be customized by adding or removing companies and organized in ascending or descending order by any data item in the list. Download the competitor table into Excel or add companies to the **Company Analysis List** and generate reports as needed.

Beneath the competitors list is a section on **Competitor News** showing the two most recent news stories for each company. Click on the headline to view the full news story.

Other Search Tools

In addition to the *Basic* and *Advanced Search* features, Mergent Online also offers several other search tools, which can be accessed through the blue tabs at the top of the screen:



D&B 20 Million Plus Private Company Search

This search tab allows you to locate private U.S. and international companies. Like in the *Advanced Search* tab, specify the criteria to be searched: company name, street address, country, number of employees, sales volume, etc. Criteria options are more limited than in the *Advanced Search*.

Executive Search

To search for company executives of active publicly traded companies, first select the company database(s) to search (at the top of the screen) and then specify the criteria to be searched: Corporate Information, Executives, Financials, Industry Codes, etc.

Government Filings

The Government Filings tab allows you to search for publicly traded companies' filings made to the U.S. Securities and Exchange Commission and the Canadian Securities Administrators. [SEC Filings \(US Filings\)](#) and [SEDAR \(Canadian Filings\)](#) must be searched separately. To find SEDAR filings, search by company name or ticker symbol, date or date range of filing, and the type of filing (e.g., annual report, etc.). SEC/EDGAR filings provide more search options, with the ability to also search by SIC or Central Index Key, as well as text searching within all documents.

Report Search

The Report Search tab allows you to search for equity or industry reports. [Equity Reports](#) provide detailed information regarding stock activity and earnings of select publicly traded U.S. companies, along with securities ratings and recommendations from analysts. Search by company, rankings, or industry. [Industry Reports](#) are available for key industry sectors and regions (North America, Europe, Asia Pacific, and Latin America). Search by company name, industry, date range, and/or region.

Ownership

Use the Ownership tab to search for corporations with holdings in other companies. Search by company name or generate a list of companies based on specific criteria.

Bond Search

Selecting the Bond Search tab will open up a new window: *Mergent BondViewer*. Choose the basic or advanced search to search for issue information, pricing, retail notes, and ratings for corporate, government, and municipal bonds.

Economics

The Economics tab allows for searching of up to 10 years of economic data for various categories, such as commodities, consumer credit, employment, energy, housing, interest rates, etc. In addition, time series data for key economic indicators is provided for selected countries including Canada, UK, Japan, China, Germany, France, and Australia. Multiple data series may be selected and will display on the preview graph to the right. You are also able to specify a time period of data to display

Notes

Company Databases

Company data within Mergent Online is divided into the following “databases” that are available for you to search:

USA Company Database (Active) – U.S. companies that are currently publicly traded

USA Company Database (Inactive) – U.S. companies that are no longer publicly traded

International Company Database (Active) – International companies that are currently publically traded

International Company Database (Inactive) – International companies that are no longer publicly traded

D&B Private Company Database – Companies that are privately owned in the U.S. and internationally

DUNS Number

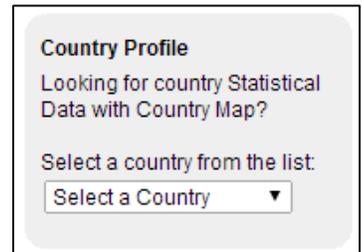
A unique, internationally recognized number, assigned to individual businesses. DUNS (Data Universal Numbering System) numbers are issued and maintained by Dun & Bradstreet.

Country Profiles

From the Basic, Advanced, or D&B 20 Million Plus Private Company search pages, look for the Country Profile box.

A PDF of an in-depth country profile will download upon selection of a country from the drop down list of over 100 countries. These profiles may also be accessed within a Company Details page or any search result page, by clicking on a hyperlinked country name. Profiles contain a map, overview of the country’s economy (including key industry information), a brief description of its geography and history, demographics, and an overview of the government structure.

Note that this information may not be updated regularly.



How To: Company Ratios and Averages

To access company ratios within Mergent Online:

- In a company’s details page, select the *Company Financials* tab and the Ratios sub-page to view up to 15 years of annual or quarterly ratios for the company, or
- When generating a *Company Comparison Report*, select **Ratios** and the desired ratios as data items. Be sure to select **Include Average** in order to include the ratio average(s) for the companies.

Exporting Files

Most reports in Mergent export to Excel, so look for the Excel icon download. Some documents are also available to be viewed as HTML, Word, and PDF files.

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For more help contact the Research Help desk for assistance.

Phone: (902) 420-5544

Email: research@smu.ca

Happy searching!

Patrick Power Library, February 2015



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