NetAdvantage makes it easier than ever to research companies, funds, indices.

Just start typing the name or the ticker into the Search Bar.

Your typed term will generate a list. Click your selection in the drop-down.

Next screen provides an overview description ("Tearsheet") of your selection.

You can search for companies, Mutual Funds, ETFs, or for an Index across the world.
Deeper Understanding of Financial Data

Company financial data is now downloadable and auditable on the new NetAdvantage site.

a) With a company open, select financial data sets from the left hand column.

b) Clicking on any number brings up the formula for that financial item.

c) Mouse over any number with this symbol to drill down to its components.

d) Clicking on a number with no deeper level source opens the filing where that number originated.
**Researching a company and its competitors**

**Company Research**: S&P Stock Reports (now CFRA Equity Research with S&P Global data) are a widely used source for evaluating a company. You can find these and reports from other research providers by selecting Research tools from the left hand column. Then open by clicking on a headline or on its pdf icon on the right.

**Finding a company’s peer group**: When you have a company on screen, click Peer Analysis > Quick Comps in the left hand column, then use tabs for different sets of comparisons.
Want More Competitors?

From a company overview, to locate MORE companies in that field, click the Primary Industry Classification listed for your company. (If you’re open to a different company page, look in left hand column for that link.)

1) Clicking on the primary industry name opens to that company’s industry (see screen shot below).
2) There, use the tabs to view key financials, trading multiples, or operating statistics.
3) Use the left hand column for:
   a) Constituents - a deep list of what companies operate in this industry,
   b) Key Professionals – who’s who in the industry,
   c) Key Stats & Ratios – benchmarks for the industry or sub-industry,
   d) Financial Operating Metrics - Company financials for the top large, mid, and small size competitors.

NOTE: Data is downloadable to Excel by clicking the Excel icon under the industry name at top of the page.
**Markets**

To locate an industry or sub-industry, select the **Markets** tab. Then, in the far right corner click **Refine industry**. In the pop-up box, drill down to the sub-industry level you want and click the **Submit** button. When there’s a + sign to left of an industry name you can click to drill to deeper sub-industries.

**Screening**

An alternative way to find and create lists of companies is to use the **Screening** tab in the Menu Bar.

- Click the **Quick Screener** for basic variables most typically used.
- Or select Company Screener or other choices for a deeper range of criteria.

Once you’ve set your criteria, to run screen click **View Results** in bottom right corner.

**Results List** will also let you add more details by clicking **Add/Edit Display Columns**.

- Click **Browse All Display Columns** to find additional fields to add to your results.
Historical Pricing

Use the Charting tab in the Menu Bar (or Chart Builder in the left hand column) to view historical pricing for a stock, fund, or an index.

1) If the user has a company open, then in left hand column links, select Chart Builder. The company that had been selected will populate the chart. Chart default is 1 year. Users can change or insert a custom date range.

2) Alternatively, from anywhere in the site – user can select Charting tab from the top menu Bar. Then insert ticker or name from scratch. This opens the same charting screen as above but now no company would pre-populate.

- enter your company, fund, or index (or several ones if you want to compare)
- enter your desired date range, to run your chart
- Add Annotations if desired
- click the Excel icon on far right side to download daily list.

Note – see tabs at bottom of spreadsheet for any additional details such as annotations.