

# DATASTREAM

VERSION 5.1

## GETTING STARTED

Updated with the changes in Navigator 4.2



THOMSON REUTERS

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A solid orange square is positioned to the left of the 'Introduction' header. From the right side of this square, a horizontal orange line extends to the right, and a vertical orange line extends downwards, forming an L-shape.

## Introduction

Overview

Datastream's data coverage

Data selection

Starting Datastream and AFO

## OVERVIEW

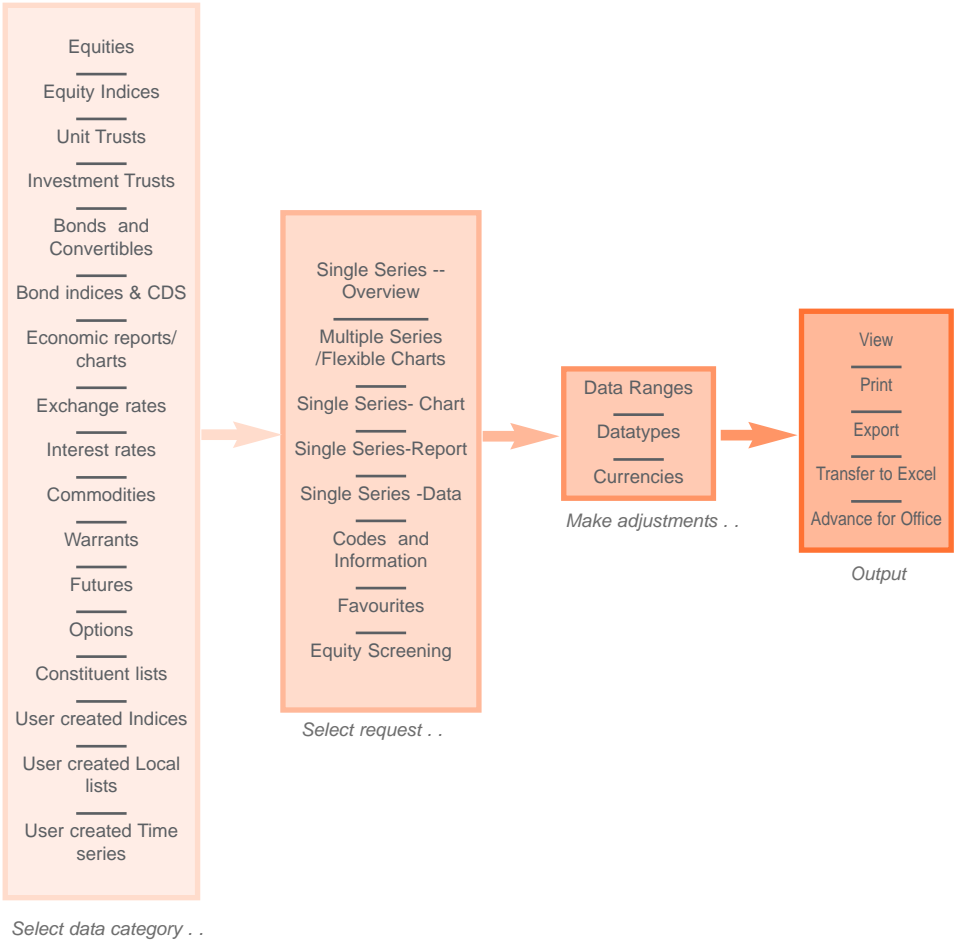
Datastream gives you access to the world's largest and most respected historical financial numerical database. Datastream provides a range of charting and reporting tools that enable you to manipulate and display, or simply download that data in the way that you want. With Datastream you can also get a set of Microsoft Office add-ins that enable you to access the Datastream database directly from within Excel, Word, or PowerPoint - create and embed data requests that put the data you want straight into your spreadsheet, document, or presentation.

## DATASTREAM'S DATA COVERAGE

Unrivalled depth and breadth of coverage across the full range of instrument types means immediate access to the data you need. Worldwide equity coverage direct from the stock markets, comprehensive market indices, economics data direct from national government sources as well as the OECD and IMF, fixed income securities and associated indices, commodities and derivatives data. Forecast earnings data from IBES, fundamental data from Worldscope and added value data sets from respected sources such as MSCI, DJ Stoxx and FTSE All World. And all data is quality checked and actively maintained by dedicated staff.

## DATA SELECTION

Datastream provides an easy to use interface with most options for standard requests selectable by mouse click. Start by selecting a data category and follow this sequence to generate the output you require:





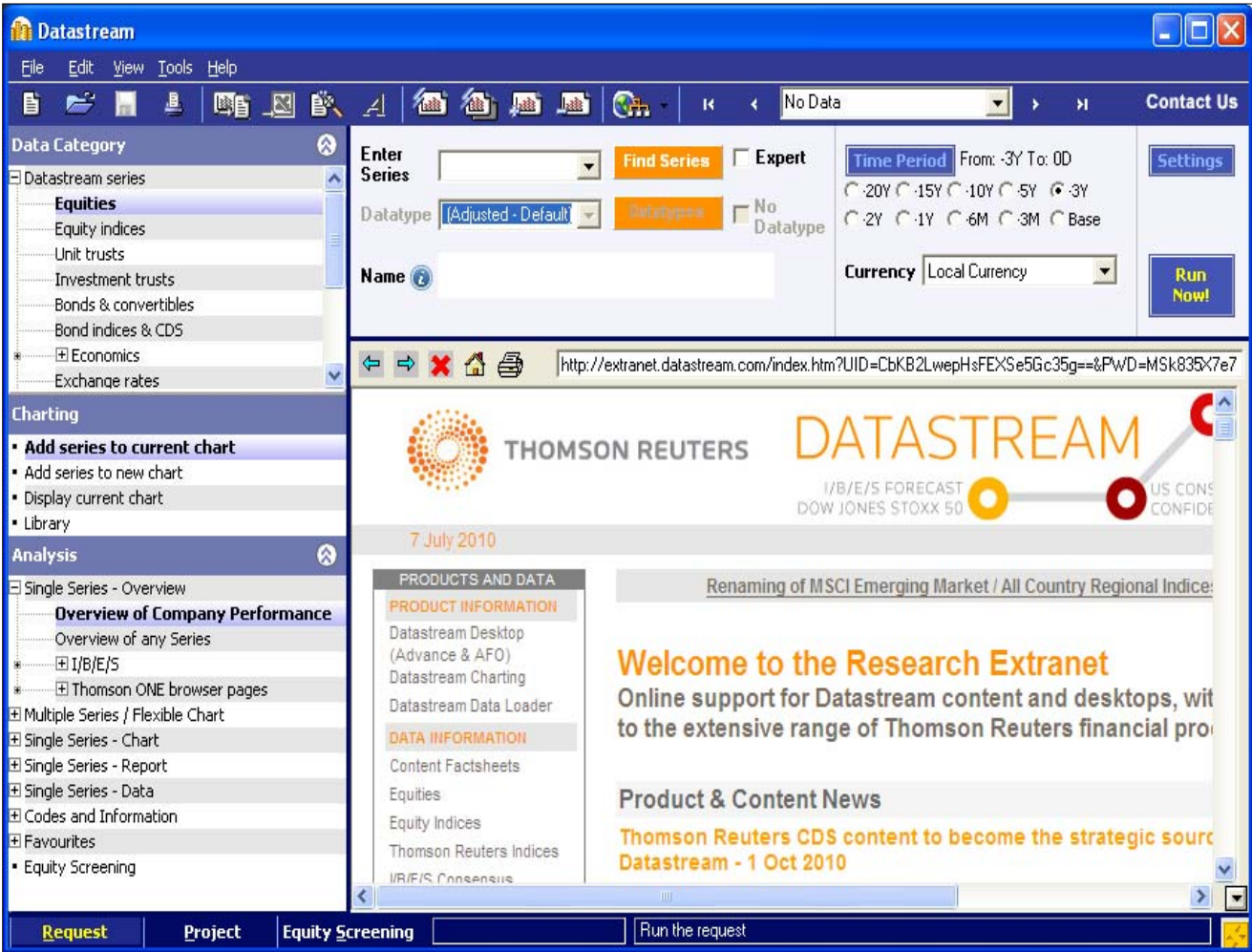
## STARTING DATASTREAM AND ADVANCE FOR OFFICE (AFO)

Before you use Datastream, or Advance for Office, your systems administrator should have configured your communications link with the Datastream host. If you have any problems connecting to Datastream, please contact your systems administrator, or see *Configure Communications, Datastream Installation Guide*.

### STARTING DATASTREAM

- Double click on the Datastream icon .

When Datastream has loaded successfully, the **Request** screen is displayed.



## CLOSING DATASTREAM

To exit from the **Request**, **Project**, or **Equity Search** screen, select **Exit** from the **File** menu.

---

**Note:**  
*Remember to save or export those reports, charts, and data that you want to use again before you exit Datastream.*

---

## STARTING AFO

To use Datastream Advance for Office, open Office application and use the **AFO** drop down menu.

## CLOSING AFO

Datastream Advance for Office closes when you close your Office application.



## Using Datastream

- The Datastream interface
  - The tool bar
  - Making a request
  - Selecting a data category
  - Selecting the series
- Using Datastream Navigator - series search
  - Selecting types of request
  - Refining your request
    - Dates
    - Datatypes
    - Currency
  - Making your request

# ■ Using Datastream

DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE

## THE DATASTREAM INTERFACE

Link to Thomson Reuters sites via browser, including Research Extranet access.

The screenshot shows the Datastream software interface with several components labeled:

- Navigation Tool bar:** Located at the top left, containing icons for file operations and navigation.
- Series selection:** A tree view on the left showing categories like Datastream series, Equities, Equity indices, and Unit trusts.
- Datatype selection:** A dropdown menu labeled 'Datatype' with options like 'Adjusted - Default' and 'No Datatype'.
- Charting:** A section on the left with options to 'Add series to current chart', 'Add series to new chart', 'Display current chart', and 'Library'.
- Report selection:** A section on the left with options like 'Single Series - Overview', 'Overview of Company Performance', 'I/B/E/S', 'Thomson ONE browser pages', 'Multiple Series / Flexible Chart', 'Single Series - Chart', 'Single Series - Report', 'Single Series - Data', 'Codes and Information', 'Favourites', and 'Equity Screening'.
- Datastream Project tab:** A tab at the bottom labeled 'Equity Screening'.

The main window displays the 'Enter Series' dialog with 'BT.A' entered in the 'Series' field and 'DEFAULT' in the 'Datatype' field. Below this, the 'DATASTREAM EQUITIES' section shows details for 'BT GROUP', including Mnemonic, Geography Code, Local Code, Current Price, 12 Mth Range, Price Change, Relative to FTALLSH, and Market Value. A line chart titled 'Price and Index (rebased)' shows the performance of BT GROUP and FTSE ALL SHARE (PI) from May 2000 to April 2001. The chart shows BT GROUP (red line) and FTSE ALL SHARE (PI) (blue line) both trending downwards, with BT GROUP ending at approximately 100 and FTSE ALL SHARE (PI) ending at approximately 150.

Index Selection

Relative Index | **Default Index** | Periods

Market

DS Market Index  
Local Market Index  
MSCI Country Index in Local Currency DISC  
MSCI Country Index in US Dollars DISC

Sector

DS Level 3 Sector Index  
DS Level 4 Sector Index  
DS Level 5 Sector Index  
DS Level 6 Sector Index  
MSCI All Markets Industrial Sector index in local curr  
MSCI All Markets Industrial Sector index in US Dolar  
MSCI CII Industry group index in local currency  
MSCI CII Industry group index in US\$  
MSCI CII Industry index in local currency  
MSCI CII Industry index in US\$  
MSCI CII Sector index in local currency

OK

Cancel

Help

Time Period

From: -1Y To: 0D  
-20Y -15Y -10Y -5Y -3Y  
-2Y -1Y -6M -3M Base

Currency Local Currency

Settings

Run Now!

DATASTREAM EQUITIES

BT GROUP

21/04/09 7.59

Mnemonic - BTA  
Local Code - 3091357

Geography Code - UK  
Exchange - London

Industry Group - TELFL  
Sector - TELFL

Current Price 89.30 20/04/09

12 Mth Range High 235.50 19/ 5/08  
Low 71.40 11/ 3/09

Price Change 1mth 3mth 12mth  
(£) 7.2% -27.4% -68.8%

Relative to FTALLSH 2.0% -27.5% -37.8%

Market Value (£) 6916.10M

Fin.Yr LocStd I/B/E/S

03/08 12/08 03/09 03/10

EPS 21.5 18.2 14.7 15.7

PE 4.2 4.9 6.1 5.7

P/Cash 1.51 54.8% (%=Rel to FTALLSH)

Dividend Rate (P) 15.79

Dividend Yield 17.69

Dividend Cover 1.2

Div Last Fin Year 15.80

Last Div Paid INT (P) 5.40 Tax-N

Pay Date 09/02/09 XD Date 24/12/08

(£) 3/08 3/07 3/08

Total sales 19514M 20223M 20704M

Pre-Tax Prof. 2024M 2469M 1987M

Publ. EPS 18.40 34.40 21.50

Cash EPS 51.85 55.69 59.27

Mkt to Bk Val 11.91 5.93 3.13

ROE (%) 193.38 98.39 36.01

No. Shares in Issue 7744790(000s)

Volume 46399.8(000s)

Percentage of free float 90%

Volatility 14

Beta 0.970

Correlation 0.528 Next Decl. AUG.09

Price and Index (rebased)

250  
200  
150  
100  
50

M J J A S O N D J F M A

BT GROUP  
FTSE ALL SHARE (PI)

Date button

Settings button helps you to configure the parameters for charts or reports.





Currency selection

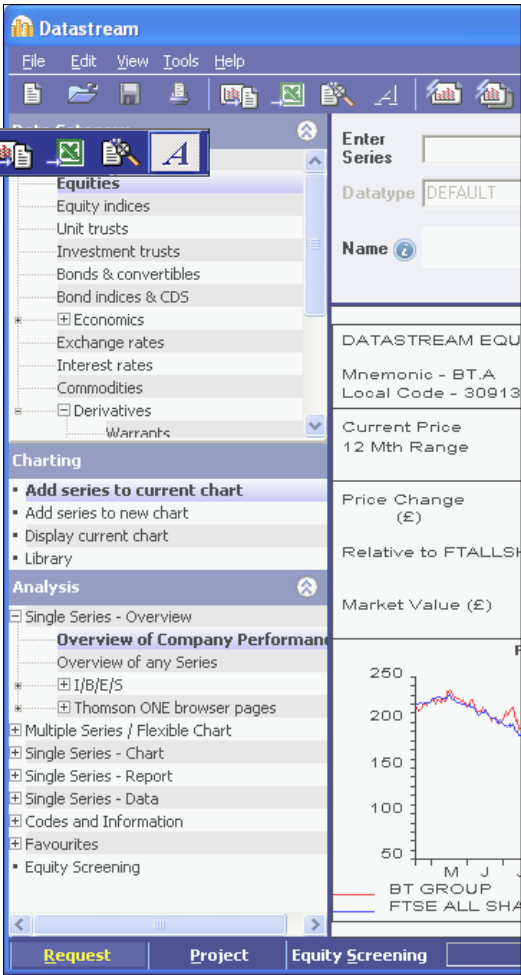
Results window





DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6

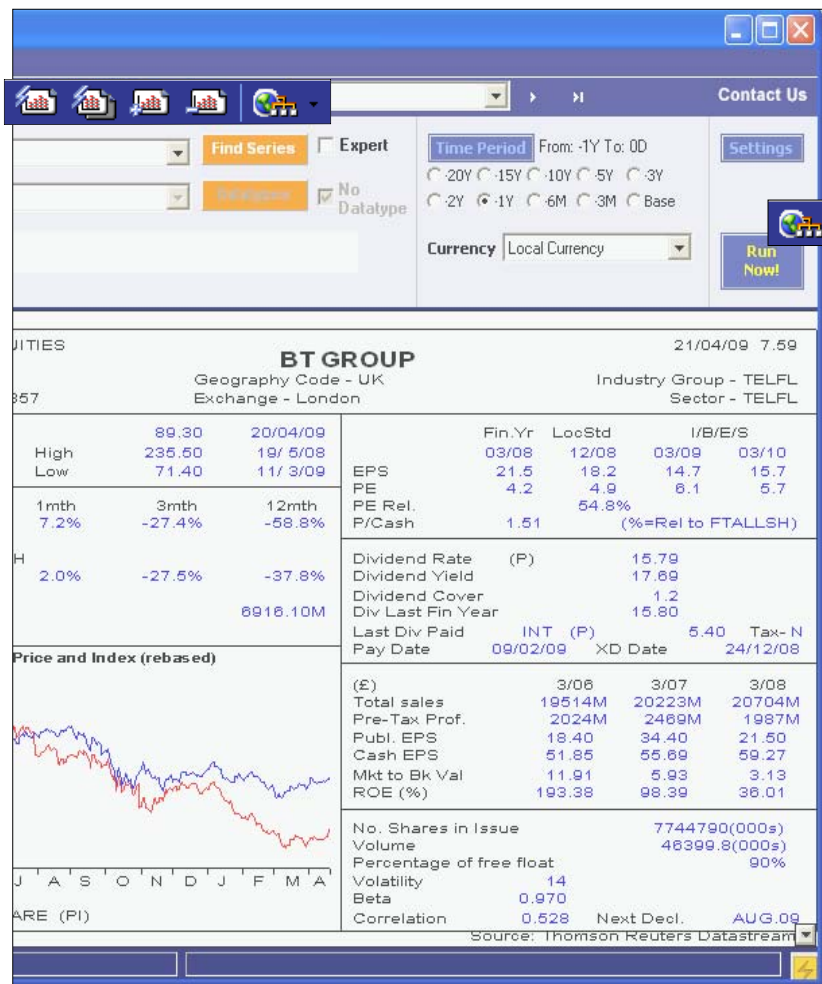
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# THE TOOL BAR

-  Create a new Project. Specify a name for the new Project when you Save the Project.
-  Open an existing Project. Choose from a list of Projects, save the details of the current Project before opening a new Project.
-  Save any additions or changes to the current Project.
-  Print the displayed request to the default Windows printer. If you want to specify another printer or change the printer settings, select File>Print to display the Windows Print dialog.



-  Export a chart, or a selected area of data, or a report in a format suitable for use with spreadsheets, word processors, etc.
-  Transfer the data or chart request to Excel, for regular updating in Excel.
-  Create, edit, merge, or download lists from Datastream for generating requests.
-  Display the Annotations tool bar. Click this button again to turn off the Annotations tool bar. Use the Show Annotations option from the View menu to show/hide any annotations added.







**Contact Us** Click the Contact Us button to raise a query on Datastream content or functionality.

**Datastream Research Extranet** - provides access to information to help you get more from Thomson Reuters Datastream - updates on new data, issues with the data, user documentation and sample Excel tearsheets.

**Note:**

*The Extranet is configured in the Datastream options dialog (from the Tools menu) to be displayed in the main window at start up.*

-  Refresh the currently displayed request with the latest Datastream prices or values.
-  Refresh all requests in the current Project with latest Datastream prices or values.
-  Add request to Project for Scheduled Night Shift processing. Use the Add New Request button to add any number of requests to a Project so all requests can be processed together when you connect to Datastream.
-  Delete the displayed request from the current Project.



## MAKING A REQUEST

To make chart, report, and data format requests, follow this sequence of steps to select the data you require:

1 Select the type of series you want from the Data Category window - holding the mouse over the data category will display quick links to Navigator.

See Selecting a data category, page 14.

Find and select your series.

- Click the Series navigation button to open Navigator.
  - Check the Expert entry box and type the exact mnemonic or code in the Series field.
- See Selecting the series, page 15.

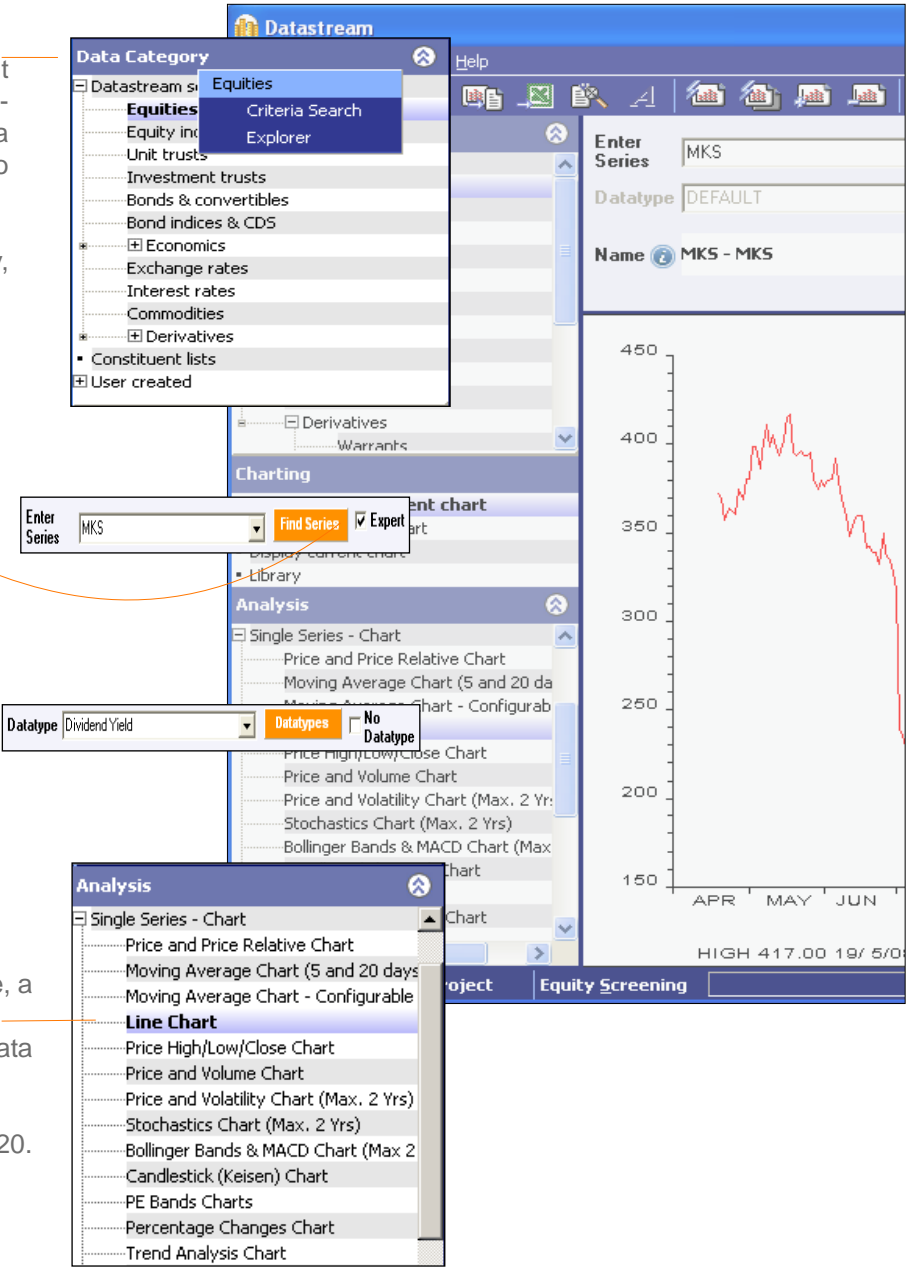
3 Select a datatype (optional).  
You can:

- Click the Datatype Navigation button to open Navigator.
- See Datatypes, page 24.

4 Select the type of request.

Select a request type tab. For example, a single chart.  
Select the type of chart, report or data format from the list displayed.

See Selecting types of request, page 20.

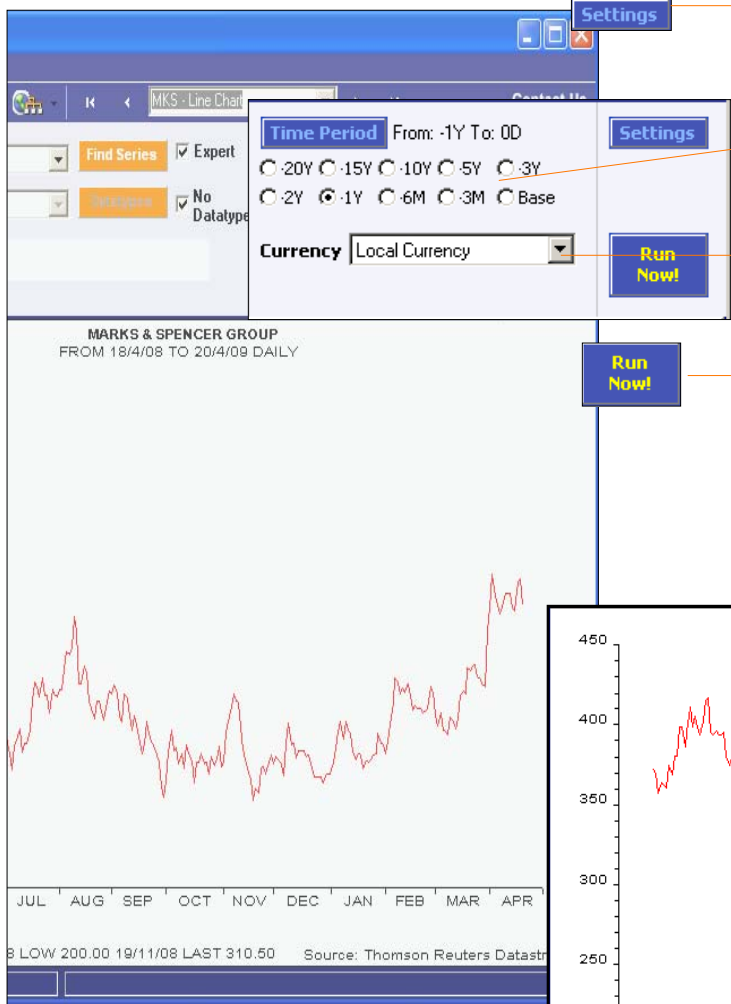


You can also make additional graph layout and data settings for some requests using the **Settings** button. See Settings, Datastream Help.

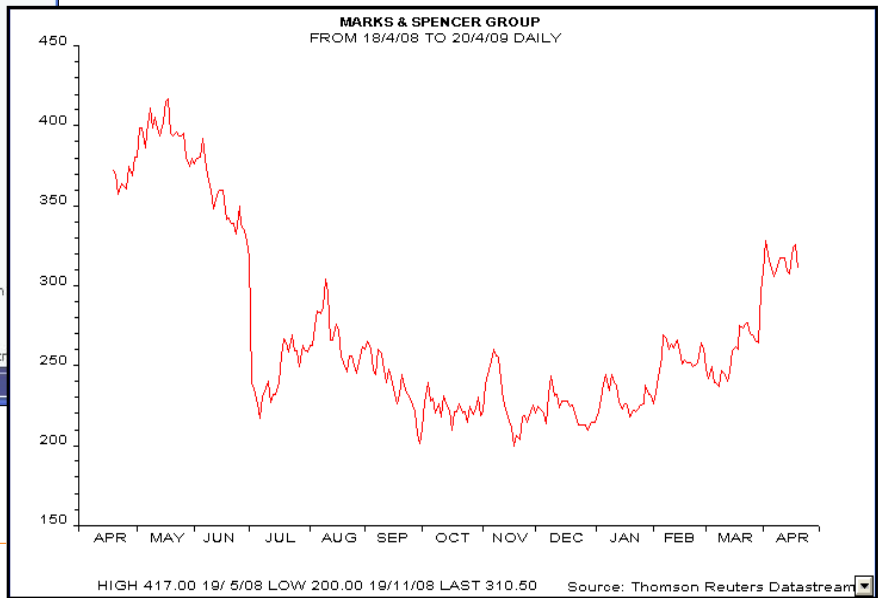
Refine your request.  
Change the display period, select a relative date option or click the **Date** button.  
See Dates, page 22.  
Change the currency, click the **Currency** drop down box.  
See Currency, page 26.

Run your request.  
Click the **Run Now** button.  
You can create a project and use the Schedule Night Shift Facility to run your project at a later date. You can save the parameters as a Favourite to save you time setting up the details again.

See Making your request, page 27.



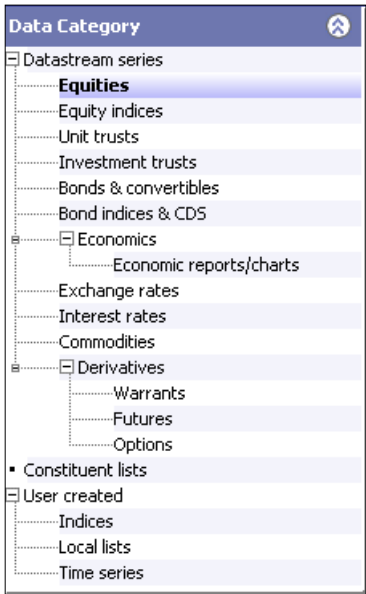
View your results.  
You can Print, Export, or Copy the results of your request, and for a data request, transfer the data to your spreadsheet for future refreshing within Excel.



To locate the series you want, you can use: the **Find** field, see Using Find, page 16; the Filter, see Using the Filter, page 18; and Equity Search, see the Datastream Help.

## SELECTING A DATA CATEGORY

Datastream series codes are stored in a database and are accessed using Datastream Navigator. The series are grouped into 17 data categories, which are selected from the Category drop down list. Selecting a data category gives you access to all the series within that category.



You can select:

- Equities
- Equity indices
- Unit Trusts
- Investment Trusts
- Bonds and convertibles
- Bond indices & CDS
- Economic reports and charts
- Exchange Rates
- Interest Rates
- Commodities
- Warrants
- Futures
- Options
- Constituent lists
- User created Indices
- User created Local lists
- User created Time series

### TO SELECT A DATA CATEGORY:

- Click the plus sign to expand the list and select a category from the list displayed.

## SELECTING THE SERIES

Use Datastream Navigator to find and select the series you want, or if you know the Datastream mnemonic or code, SEDOL, ISIN, or other Datastream supported code, check the Expert entry check box and type the mnemonic or code in the Series field to select your series.

The screenshot shows a light blue rectangular interface. On the left, there are three labels: 'Enter Series' next to a text input field, 'Datatype' next to a dropdown menu, and 'Name' next to a text input field with an information icon. On the right, there are two orange buttons: 'Find Series' and 'Datatypes'. Below these buttons are two checkboxes: 'Expert' and 'No Datatype'. Three orange lines with arrows point from the text instructions below to specific parts of the interface: one to the 'Enter Series' field, one to the 'Find Series' button, and one to the 'Expert' checkbox.

Enter part of the name for the required series  
Click the Search button to open the Datastream Navigator.

Click the drop down button to view  
and select recent 12 series

Expert entry:

Check the **Expert entry** box and type the exact mnemonic or code or Datastream function or expression directly in the **Series** field.

### TO SELECT A SERIES:

- Click the **Series navigation** button to find and select your series from Datastream Navigator.
- To view recent series use the drop down to select from the last 12 series used.
- Check the **Expert entry** box and type the mnemonic or code in the **Series** field.

You can also use the Datastream Help Browser.

## USING DATASTREAM NAVIGATOR - SERIES SEARCH

Series search is the most basic search. Use this to search by the name, DS mnemonic, DS code, SEDOL, ISIN, local code, or IBES ticker of the series you are looking for. Alternatively you can use the 'Explorer' hierarchies to drill down to the series.

### TO FIND AND SELECT A SERIES USING SET CRITERIA PAGE:

Click the **Search** button to open **Datastream Navigator**.

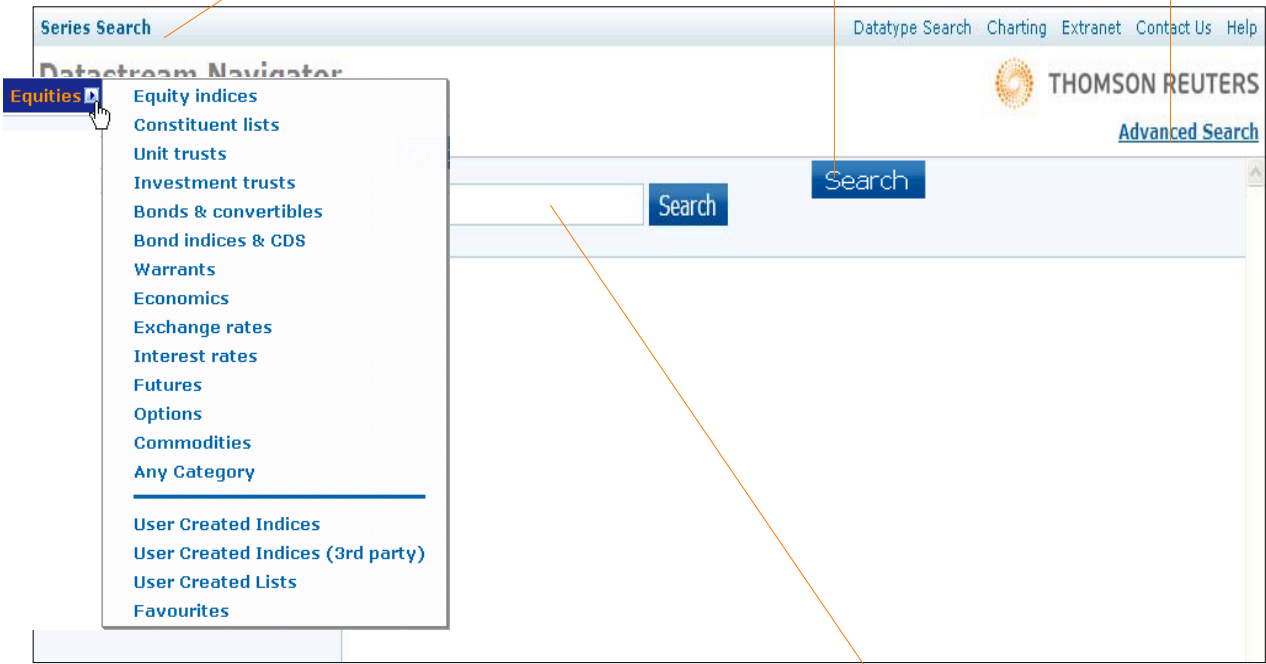
Click the **Series Search** button if it is not already selected.

Click the **Search** button.

You can also you the **Advance Search** link,

Select the kind of series you require.

Type the first few characters of the name, mnemonic, or code in the **respective** field.



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You can select related series and get more data on the series.

Series Search

Datastream Navigator

← →

Data Category: Economics

gdp

Search

Explore

Recent Searches

Use Search Ref

Searching Hints

Refine Search

Market

Austria25193

Netherlands25097

Italy24890

More

Source

Eurostat664770

World Bank WDI17419

Oxford Economics16523

More

Frequency

Annual509802

Quarterly240820

Monthly5642

Daily36

Weekly1

Adjustment

Not seasonally adjusted258834

Current prices,not seasonally adju...209551

Constant prices,not seasonally adj...89859

More

Changes on Datastream

Navigator 4.2 - significant enhancements to the explorer interface - 25th Feb

Navigator 4.2 - 4 minute video on the new features

Results for gdp

1-10 of 756,301

	Name	Symbol	Hist.	Market	Source	Frequency	Adjustment
★★★★	GDP	EMGDP...D	16Y	Euro Area, Evolving Membership	Eurostat	Quarterly	Constant prices, SA
>★★★★	GDP - INDUSTRIAL PRODUCTION (CHAINED \$, SA, AR)	CNIPTOT...D	14Y	Canada	Statistics Canada	Monthly	Constant prices, SA
>★★★★	GDP - MANUFACTURING (CHAINED \$, SA, AR)	CNIPMAN...D	15Y	Canada	Statistics Canada	Monthly	Constant prices, SA
>★★★★	GDP	TMGDP...	19Y	Turkmenistan	The Statistical, Economic and Social Research and Training Centre For Islamic Countries.	Annual	Current prices, not SA
>★★★★	GDP	LNGDP...D	11Y	Lithuania	Statistics Lithuania	Quarterly	Constant prices, SA
>★★★★	GDP	WAGDP...D	7Y	Namibia	National Planning Commission, Namibia	Quarterly	Constant prices, SA
>★★★★	GDP	OEGDP...D	23Y	Austria	Statistics Austria	Quarterly	Constant prices, SA
>★★★★	GDP	JOGDP...C	8Y	Jordan	The Hashemite Kingdom of Jordan Department of Statistics (DOS)	Quarterly	Constant prices, not SA
>★★★★	GDP (CON)	IVGDP...	40Y	Cote D'Ivoire	The Statistical, Economic and Social Research and Training Centre For Islamic Countries.	Annual	Constant prices, not SA
>★★★★	GDP AT BASIC PRICES	IQGDP...A	4Y	Iraq	Central Organization for Statistics and Information Technology, Iraq	Quarterly	Current prices, not SA

Explore more results like these: Key Indicators by Economic Category > National Accounts > GDP by Expenditure

None

Q%

Q act

Y%

Y act

All

Last

Eurozone, GDP and Main Components, GDP and Main Components - Constant Prices, GDP, Constant Prices, SA, EUR, 2005 chnd prices

MnemonicEcoWin Code  
EMGDP...Des:emue01778001011

Latest Value2146.32 (Billions Euro, 2005 CHND PRICES)

TimespanQ1 1995 - Q4 2011, Quarterly

SourceEurostat

AdjustmentConstant prices,seasonally adjusted

ExplorersKey Indicators by Country > Euroland (11/12/13)  
Key Indicators by Economic Category > National Accounts > GDP by Expenditure

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Advanced Search

Explore more results like these: Key Indicators by Economic Category > National Accounts > GDP by Expenditure

Add to Favourites

Eurozone, GDP and Main Components, GDP and Main Components - Constant Prices, GDP, Constant Prices, SA, EUR, 2005 chnd prices

MnemonicEcoWin Code  
EMGDP...Des:emue01778001011

Latest Value2146.32 (Billions Euro, 2005 CHND PRICES)

TimespanQ1 1995 - Q4 2011, Quarterly

SourceEurostat

AdjustmentConstant prices,seasonally adjusted

ExplorersKey Indicators by Country > Euroland (11/12/13)  
Key Indicators by Economic Category > National Accounts > GDP by Expenditure

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The series is displayed in Datastream.

DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6

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Below example illustrates the steps to use Explorer to find a series.

Click the Explorer link

1

Series Search

Datatype Search

Charting

Extranet

Datastream Navigator

THOMSON

Data Category: Economics

Search

Explore

Recent Searches

Use Search Ref

Searching Hints

Exploring Economics » National Sources

Close

» Equities

Economics

» Equity Indices

» Commodities

» Exchange Rates

» Interest Rates

» Bond Indices

» Credit Default Swaps

» Key Indicators by Country

» Key Indicators by Economic Category

» Point in Time Restricted Content (use

National Sources

» International Historical Sources

» International Forecasts & Surveys

» International Industry Associations

» Previous 3rd Party Explorers

» Albania

» Algeria

» Argentina

» Armenia

» Australia

» Austria

» Azerbaijan

» Bahrain

» Bangladesh

» Belarus

» Belgium

» Bolivia

» Bosnia and Herzegovina

» Botswana

» Brazil

» Bulgaria

Select Economics data category.

2

Select the from the list

DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6

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You can export the list to excel using Export to Excel button.

You can reselect the last viewed explorer hierarchies (and searches) for quick navigation.

Series Search

Datatype Search

Charting

Extranet

Contact Us

Help

Datastream Navigator

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Advanced Search

Data Category: Economics

Exploring Economics » National Sources » Belgium » Key Indicators

Explore more Recent Searches Use Search Ref Text Search

Refine Search

Text

Market

Source

Frequency

Adjustment

Search

Belgium 60

Euro Area, Evolving Membership 2

Bank of England 2

More

Monthly 40

Quarterly 17

Annual 5

Key Indicator List Belgium (List M#BGKEY) (filtered)

1-62 of 62

Name	Symbol	Hist.	Frq
GDP (BREAK BETWEEN 1994 & 1995)	BGGDP...B	31Y	Q
GDP (CHAINED 2009)	BGGDP...D	31Y	Q
PRIVATE CONSUMPTION (BREAK BETWEEN 1994 & 1995)	BGCNPER.B	31Y	Q
PRIVATE CONSUMPTION (CHAINED 2009)	BGCNPER.D	31Y	Q
PUBLIC CONSUMPTION (BREAK BETWEEN 1994 & 1995)	BGCNGOV.B	31Y	Q
PUBLIC CONSUMPTION (CHAINED 2009)	BGCNGOV.D	31Y	Q
GFCF (BREAK BETWEEN 1994 & 1995)	BGGFCF...B	31Y	Q
GFCF (CHAINED 2009)	BGGFCF...D	31Y	Q

Belgium, Liabilities, currency in circulation, EUR

Line chart showing data from 1998 to 2012. The y-axis is labeled x 1,000 and ranges from 5 to 30. The x-axis shows years from 98 to 12. The data shows a general upward trend with some fluctuations.

Latest Value 29121 (Millions Euro)

Timespan Dec 1996 - Feb 2012, Monthly

Last Updated Date 29/03/2012

Conversion Method End of Period

Market Belgium

Source Banque Nationale de Belgique

The Filter facilities enable you to select several markets, or several sources, etc

Select the list to preview the detail.

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## SELECTING TYPES OF REQUEST

Datastream gives you access to a wide range of reports, charts, summaries, overviews, and comparison requests.

Over 100 Datastream reports, charts, and data formats are stored in Datastream's database. You can access these by selecting a report/chart type node on the **Request** screen.

Select a request type node to further select the request from the list displayed.

Analysis

Single Series - Overview

Overview of Company Performance

Overview of any Series

I/B/E/S

Thomson ONE browser pages

Multiple Series / Flexible Chart

Single Series - Chart

Single Series - Report

Single Series - Data

Codes and Information

Favourites

Equity Screening

Charts or reports available.

### TO SELECT A REQUEST:

- 1

Select a request type node of the tree.
- 2

Select a request from the list displayed.

## REQUEST TYPES

**Single Series - Overview** - You can request Datastream company, commodity, warrant, trust, and bond performance overviews, and a range of fixed format IBES forecast overviews.

**Multiple Series / Flexible Chart** - You can display information on multiple series, enabling you to create comparisons across different data category types, and use flexible charts for multiple chart requests. For example, you can compare an equity with an index such as the CAC40 and with an economic series such as the RPI.

**Single Series - Chart** - You can request any of the standard Datastream graphics, including Line, Moving Average, Stochastics, High-Low-Close, Candlesticks, and Bollinger Bands.

**Single Series - Report** - You can select from a range of pre-formatted report types including Profit & Loss, Dividend & Earnings, Key Accounts Ratio, and Company Profiles.

**Single Series - Data** - You can download time series, static, and company accounts data, which you can export or transfer to your spreadsheet.

**Codes and Information** - You can use the Remote Search as an alternative way to find codes for active and dead equities, unit, investment trusts, bonds, warrants and convertibles. There is also an option to set Datastream to run requests and update projects in English, French and German.

**Favourites** - You can save frequently used projects as **Favourites** so that next time you can run the request quickly.

**Equity Screening** - search the Datastream global equity universe for companies that match your chosen criteria.

## REFINING YOUR REQUEST

### DATES

Each data category has a default date range. You can choose your own from four display period options:

- Fixed start and end dates - a fixed period. For example, the whole of last year.
- Relative start and end dates - a fixed period relative to today's date.
- Datastream base date - a period starting with the date of the earliest data available on the database for a series.
- Today - a period ending with the latest available price or value.  
Intra-day prices are available for many markets. To receive the latest intra-day price or value, you must subscribe to the intra-day service.

Datastream enables you to combine these start and end date options.

### TO SELECT A DATE PERIOD:

Click the **Time Period** button. The **Configure Dates** dialog is displayed.

Relative dates.

Time Period From: -1Y To: 0D  
☐ -20Y ☐ -15Y ☐ -10Y ☐ -5Y ☐ -3Y  
☐ -2Y ☒ -1Y ☐ -6M ☐ -3M ☐ Base  
Currency Local Currency  
Settings  
Run Now!

Fixed date option.

Relative date option.

Base date option.  
Displays data from the earliest date that data is available.

Configure Dates

Start Date

☐ Fixed 22/10/2001  
☐ Show as Year

☒ Relative 1 Year  
☒ Before Today ☐ After Today

☐ Datastream Base Date -4 Year Ends: (Company Account Reports Only)

End Date

☐ Fixed 22/10/2002  
☐ Show as Year

☒ Relative 0 Day  
☒ Before Today ☐ After Today

☐ Year Ends: 0 Year Ends: (Company Account Reports Only)

☐ Today

OK Cancel Help

Year ends - to request the number of year ends for company accounts reports and data.

Today's date option.  
(To receive the latest intra-day price or value, you must subscribe to the intra-day service)

Select the date options.

2

Fixed date option

Use the spin buttons to select a date.

Click the **Calendar** button to display an interactive calendar.

Type a date.

Start Date

☒ Fixed 10/22/2001

Start Date

☒ Fixed 10/22/2001

October						2002
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

To select both start and end periods before today.

Use the spin buttons to select a date.

Relative date option

To specify year ends for Company Accounts Report only.

To select both start and end dates after today, for projected series.

Select day, week, month, quarter or year.

Start Date

☒ Relative

1 Year

☒ Before Today ☐ After Today

-4 Year Ends:  
(Company Account Reports Only)

Click OK.

3

Start Date

☒ Relative

0 Day

☒ Before Today ☐ After Today

0 Week

Month

Quarter

Year

(Company Account Reports Only)

# DATATYPES

The datatype defines the type of data. For example, the default datatype for equities is Price (Adjusted).

For some data categories and report/chart types, you can select the datatype. For example, for an Equity line chart request you can change from the default Price (Adjusted) datatype to Market Value.

When the Datatype navigation button is enabled, click to display the datatypes available for your data category.

Datatypes are grouped by their type; for example, Datastream IBES datatypes, MSCI datatypes, and Worldscope data items.

## To select a datatype:

Click the **Datatype** navigation button. **Datastream Navigator** is displayed.

Datatype navigation button.

Check this box if default datatype is required.

**Datatype** Price Index      **Datatypes** No Datatype

**Datastream Navigator**

**Datatype Search** Charting Extranet Contact Us

**Data Category:** Equities      Displayed Results 75

Find Name Contains And Name Contains Filter / Search Reset

Datatype All Static Time Series Key WS Item All No Yes Worldscope Level All Company Security Workscope Report Type Annual

Name  
Name  
Mnemonic

- ▶ Key Datatypes
  - ▶ Datastream
  - ▶ FTSE AW
  - ▶ GICS Direct
  - ▣ IBES
  - ▶ Constituent List Datatypes
  - ▶ MSCI
  - ▶ Russell
  - ▶ STOXX
  - ▣ Workscope

Name
% Weight Of Each Constituent Within The List
12 Month Forward Adjusted Funds From Operations
12 Month Forward Book Value Per Share
12 Month Forward BPS Book Value Per Share
12 month forward CAP Capital Expenditure
12 Month Forward Capital Expenditure
12 Month Forward Cash Earnings Per Share
12 Month Forward Cash Flow Per Share
12 Month Forward CPS Cash Flow Per Share
12 Month Forward CSH Cash Earnings Per Share
12 Month Forward Dividend Per Share

**12 month forward - Capital Expenditure - datatype (K1FD12)**

Also referred to as "12 month forward growth rate," K1FD12 datatype to be calculated "on the fly" from the mean values.

The 12 month forward Capital Expenditure for FY1 is calculated as follows:

$$K1FD12 = (IM \times F1) + ((12 - IM) \times F2)$$

Where:

Starts With  
Equals  
Starts With  
Contains  
Does Not Contain

Select Equity Starts With Contains from the drop down box.

3 Select the type of datatype, **Static** or **Time Series**.

4 Type the search criteria.

7 Click the **Filter / Search** button.

**Datastream Navigator**

**Datatype Search**

**Data Category:** Equities

**Filter / Search** Displayed Results 75


Find Name Contains And Name Contains Filter / Search Reset

**Datatype** All Static Time Series

- Key Datatypes
  - DataStream
    - Time Series
      - Pricing
      - Earnings
      - Dividends
      - Number of Shares
      - Corporate Actions
      - Fundamentals
      - Related Index Datatypes
      - MiFID
      - Constituent List Datatypes
    - Static
      - FTSE AW
      - GICS Direct
      - IBES
      - Constituent List Datatypes
      - MSCI
      - Russell
      - STOXX
      - Worldscope

Name	Mnemonic	Datatype
Depository Ratio	DRATIO	Time Ser
Market Value (Capital)	MV	Time Ser
Market Value For Company	MVC	Time Ser
Net Asset Value	NAV	Time Ser
Number Of Trades	NT	Time Ser
Price - Official List	OP	Time Ser
Price (Adjusted - Default)	P	Time Ser
Price (Adjusted) (Unpadded)	P=S	Time Ser
Price (Adjusted) (Unpadded)	P=T	Time Ser
Price - Ask	PA	Time Ser
Price - Ask (Padded)	PAP	Time Ser
Price - Bid	PB	Time Ser
Price - Bid (Padded)	PBP	Time Ser
Price - Intraday High	PH	Time Ser
Price - Intraday High (Padded)	PHP	Time Ser
Price Index	PI	Time Ser
Price - Intraday Low	PL	Time Ser
Local Market Price (London)	PLN	Time Ser
Price - Intraday Low (Padded)	PLP	Time Ser
Price - Opening	PO	Time Ser
Price - Opening (Padded)	POP	Time Ser
Price, Most Traded	PQ	Time Ser
Price Return	PRIR	Time Ser

**Datatype Definition:**

To view the definition for a particular Datatype simply select the  image and the definition will be displayed here

Items 1-51 of 51

6 Select the group of datatypes to select from.

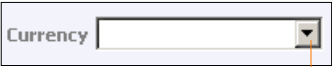


8 Check the Navigator definition to ensure that the correct datatype has been selected.

9 Select the datatype from the list displayed. The datatype is displayed in Datastream.

# CURRENCY

You can select which currency you want to display your results in.



Click the **Currency** drop down list and select a currency from the list displayed.

---

**Note:**

*The parameters that you can change are dependent on the data category and chart, report, or data format chosen. For example, you can change the date, datatype, and currency for an Equity - Line Chart request, but only the date for a Constituent - Bar Chart request. If you cannot change the currency, the currency option is greyed out.*

---

## MAKING YOUR REQUEST

Once you have selected the criteria for your request and made your display date, datatype, and currency adjustments, you can make your request:

**Run Now:**

Request the report, chart, or data straight away.



This connects you to Datastream and displays the result. You can change the request criteria and click the button again, or save the request for future use.

**Note -**

*Double clicking on the request in the Explorer hierarchy will also run the request.*



**Add New Request:**

Add the request to the open Project to refresh later.

This does not connect you to Datastream, but stores the request in the open Project. This enables you to work off line and send all your requests at the time of your choice.

Please see *Using Projects, Datastream Help*.







## Using your results

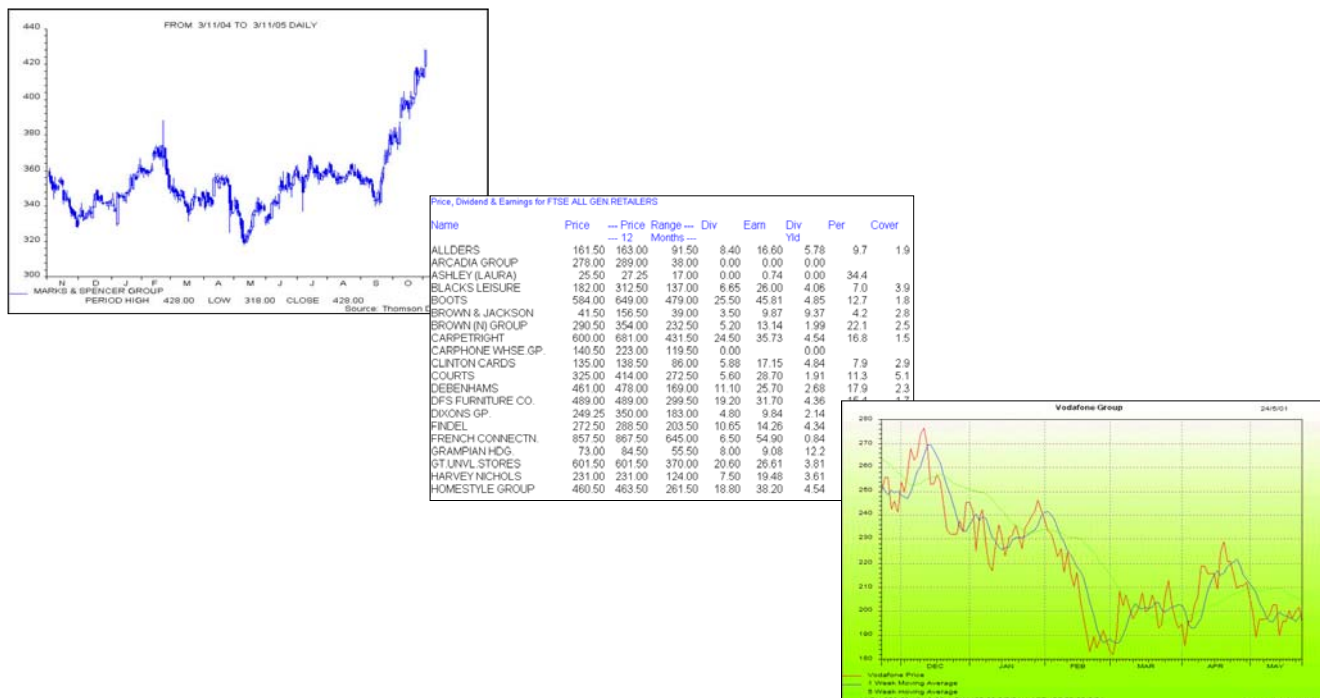


- Printing reports, charts, and data
- Copying reports, charts, and data
- Transferring charts to MS Office
- Exporting charts, reports, and data

## ■ Using your results

When you request reports, charts, and data formats from Datastream, they are displayed within Datastream and are automatically added to the current open Project. You can:

- Print your charts and selected pages of reports through any Windows printer.
- Copy reports, charts, and data formats to the Windows clipboard for further use in Windows applications.
- Export reports, charts, and data in a variety of formats for use with other applications such as word processors.
- Transfer data to Microsoft Excel. Data downloaded from Datastream can be transferred to spreadsheet for regular updating.
- Transfer charts to Microsoft Office applications like Excel, Word, and PowerPoint. You can transfer your chart requests directly into these applications as embedded, dynamic objects. Once embedded, the requests can be refreshed, and within Excel and PowerPoint - you can right click on the chart to re-edit the chart in Datastream - then transfer it back, with any edits, to Excel and PowerPoint.



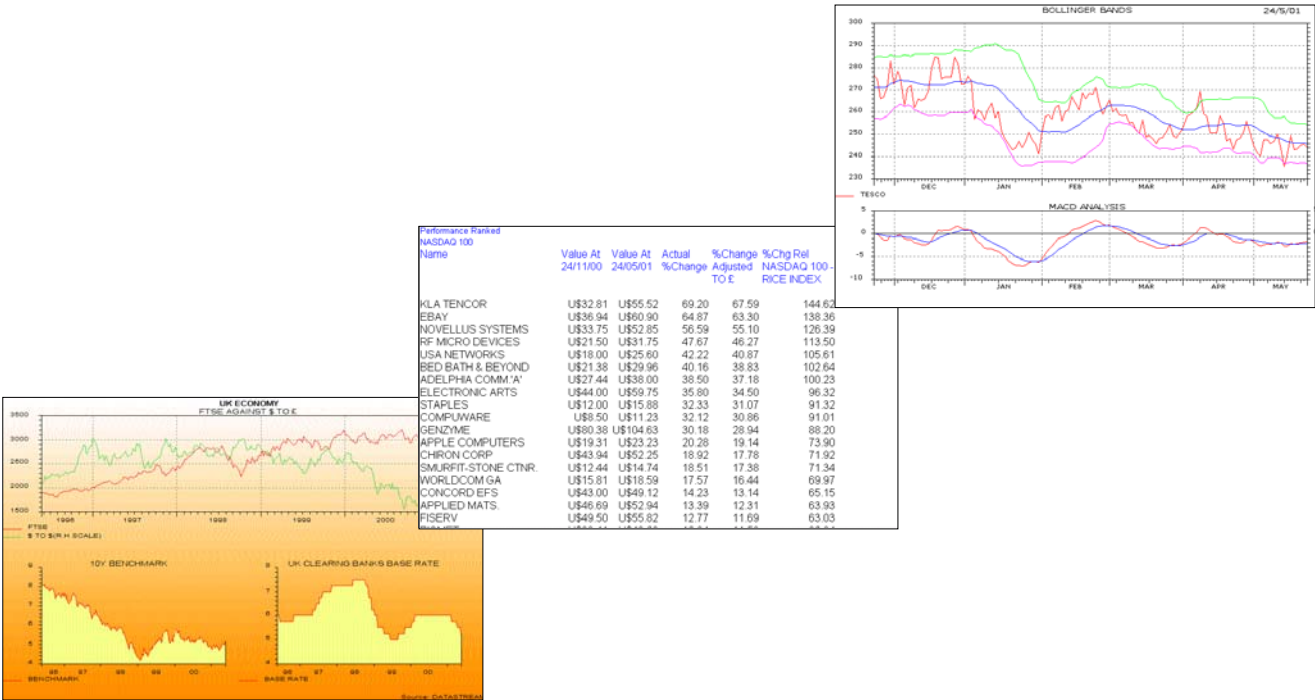
## PRINTING REPORTS, CHARTS, AND DATA

You can print any displayed report, chart, or data format through the default Windows printer, (in addition you can print a set of charts with several charts on page using the Print Project (Chart Layout) option).

### To print your report, chart, or data:

- Select **Print** from the **File** menu, OR  
click the **Print Current Request** button  to print the request displayed.

To change the printer or printer settings, select **Print Setup** for either Report or Chart from the **File** menu.



## COPYING REPORTS, CHARTS, AND DATA

You can copy the displayed report, chart, or data format to the clipboard and paste it into other Windows applications.

### TO COPY A REPORT:



- 1 Select the area to be copied; this can be:
  - A range of cells - click the left mouse button and drag the cursor over the display area to define the cell area to be copied.
  - The whole report (default) - the whole report is selected automatically when it is displayed.
- 2 Select **Copy** from the **Edit** menu.

---

**Note:**

*The report text will be held on the clipboard in text format with TAB formatting, but without font and text formatting.*

---

### TO COPY A CHART:

- Select **Copy** from the **Edit** menu.

---

**Note:**

*The chart will be held on the clipboard as a Windows Meta File.*

---

## TO COPY DATA:



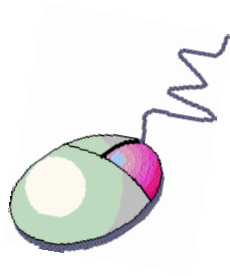
- 1 Select the area to be copied; this can be:
  - A range of cells - click the left mouse button and drag the cursor over the displayed spreadsheet to define the cell area to be copied to the clipboard.
  - All the data (default) - the whole data request is selected automatically when it is displayed.
- 2 Select **Copy** from the **Edit** menu.

---

**Note:**

*The data selected will be held on the clipboard in text format with TAB delimiting for direct pasting into a spreadsheet or word processor.*

---



You can use the right click menu to copy.

# TRANSFERRING CHARTS TO MS OFFICE

Chart requests can be transferred directly into Excel, Word, and PowerPoint as refreshable objects.

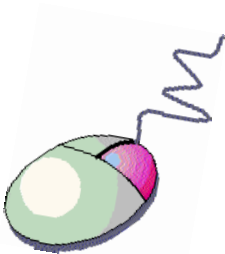
## TO TRANSFER A CHART REQUEST TO MS OFFICE:



- 1 Select **Transfer to Excel** (Word, PowerPoint) from the **Tools** menu. Excel (Word, PowerPoint) is opened with a new worksheet (document, slide). Your chart is displayed.
- 2 You can display the chart:
  - as a single element**OR**
  - as an Office Picture - right click and select **Display as Office Picture**. This gives you the Office Picture format options.

**Note:**

*To display the chart as transparent, right click over the Refresh button and de-select Display original background (the chart format must be as an Office Picture). To re-edit a chart once transferred to Excel or PowerPoint - right click on the chart and select the Edit Chart option.*



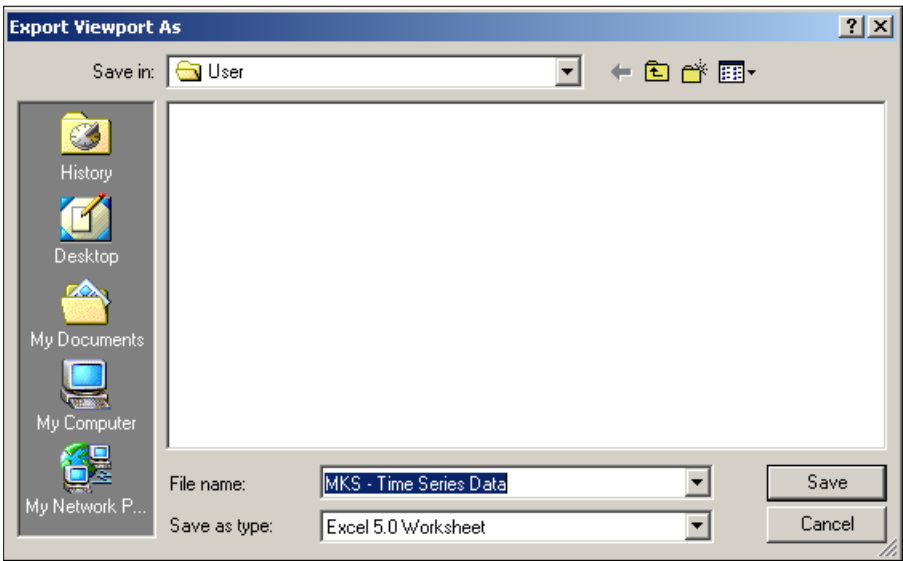
You can use the right click menu to transfer and export.

## EXPORTING CHARTS, REPORTS, AND DATA

You can export the displayed report, chart, or data as a file in a format suitable for use with other software packages. The default formats are: .XLS (Excel spreadsheet) for reports and data, and .WMF (Windows meta-file) for charts.

### TO EXPORT A CHART, REPORT, OR DATA:

- 1 Select Export from the Tools menu.  
The **Export Viewport As** dialog is displayed.




- 2 Select the export details:
  - Type an export file name
  - Select a drive or a server destination
  - Select an export format
- 3 Click **OK**.





# Using Datastream Advance for Office

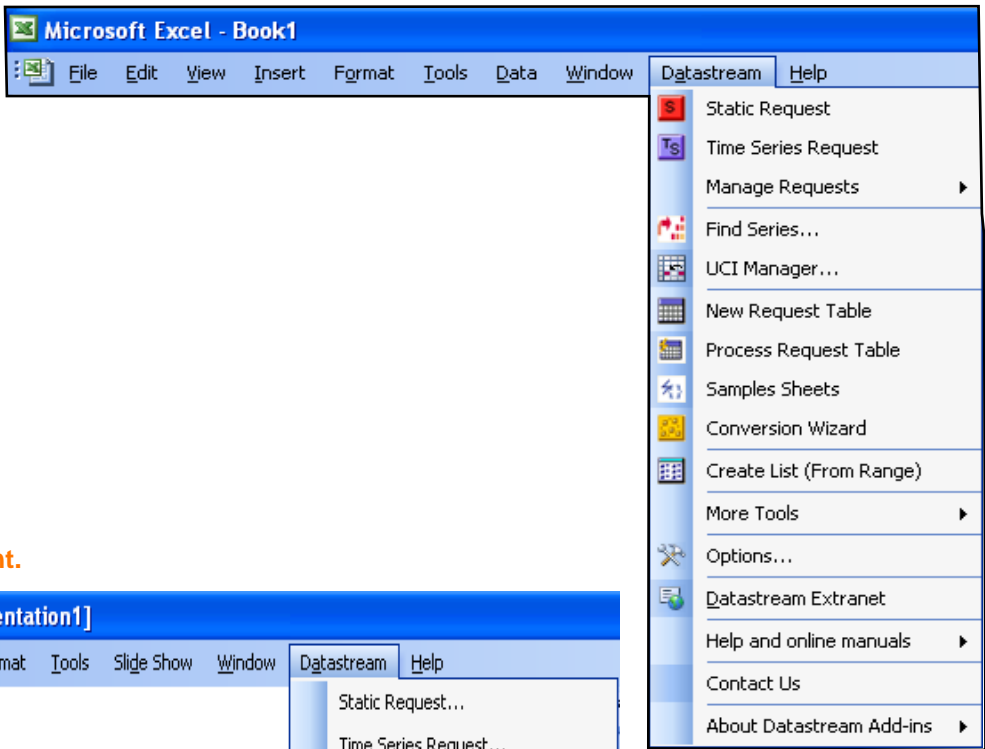


The Datastream Advance for Office (AFO) interface  
    Making a static request  
    Making a time series request  
    Using the Request Manager

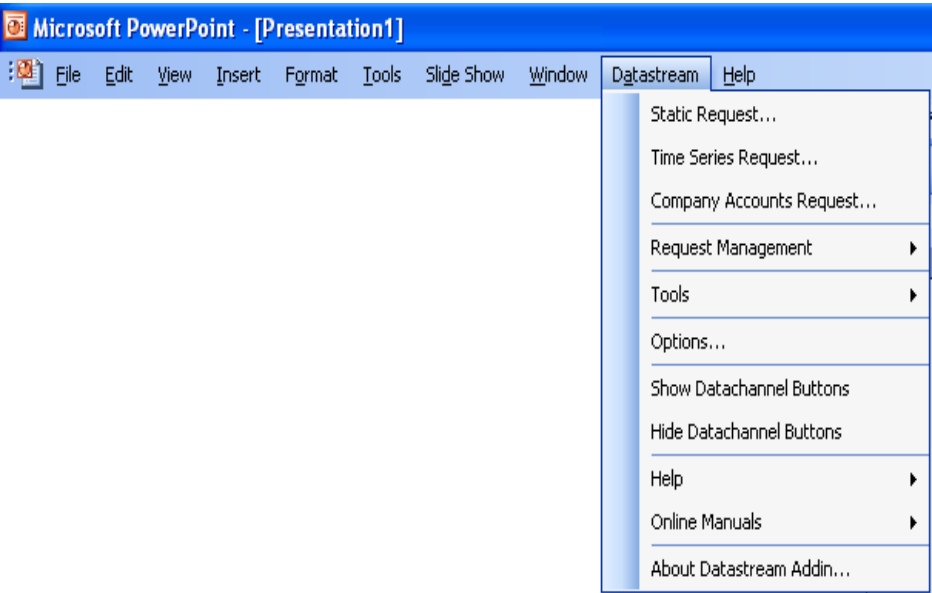
## THE DATASTREAM ADVANCE FOR OFFICE (AFO) INTERFACE

To use Advance for Office, use the **Datastream** menu in your Office application.

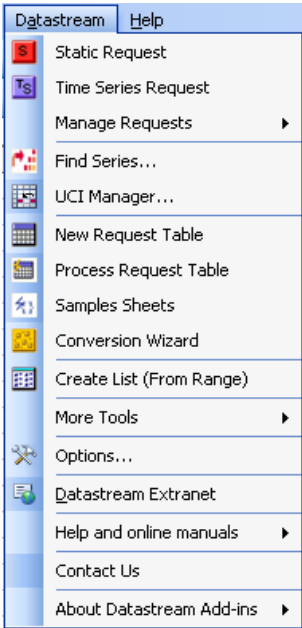
### AFO menu in Excel.



### AFO menu in PowerPoint.



# USING DATASTREAM ADVANCE FOR OFFICE



In AFO you can make static, time series, and company accounts requests.

## Static requests

To request data for a specific date.

For example, the price, PE and dividend yield for Pepsico and Coca-Cola for 01/01/05

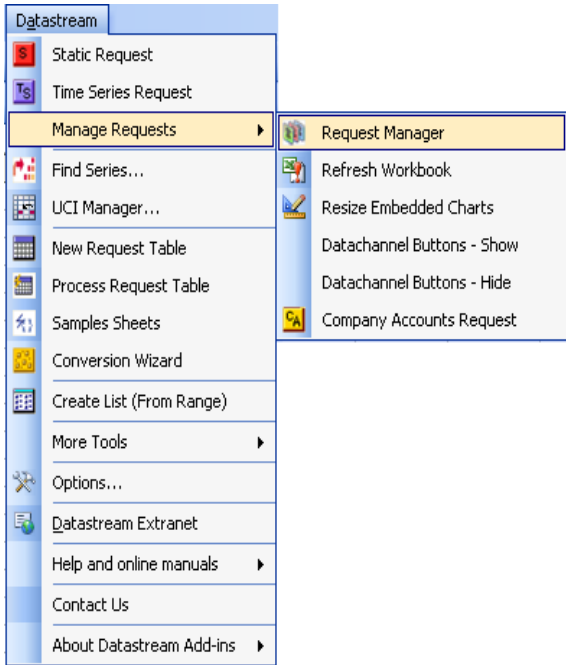
Refresh	12/31/2004				
Type	P	PE	DY	CURRENCY	
U:PEP	52.2	21.9	1.76	U\$	
U:KO	41.64	22.1	2.4	U\$	

## Time series requests

To request data over a specific period, defined by a start date, end date, and frequency of data.

Refresh	12/31/2004					
End	12/30/2005					
Frequency	D					
Name	Code	CURRENCY\	12/31/2004	1/3/2005	1/4/2005	1/5/2005
PEPSICO	U:PEP(P)	U\$	52.2	51.94	51.57	51.63

For example, the daily price for Pepsico from 01/01/05 to 01/01/06



## Note:

Since the replacement of Datastream company accounts with the normalised Worldscope fundamentals database - fundamentals data can now be retrieved using Static and Time Series requests.

## Request Manager

Use the Request Manager to manage your embedded requests. All the chart and data requests in your Excel work book are listed with their details. You can edit, delete, or refresh the requests individually or together.

# MAKING A STATIC REQUEST

Select **Static Request** from the **AFO** menu.

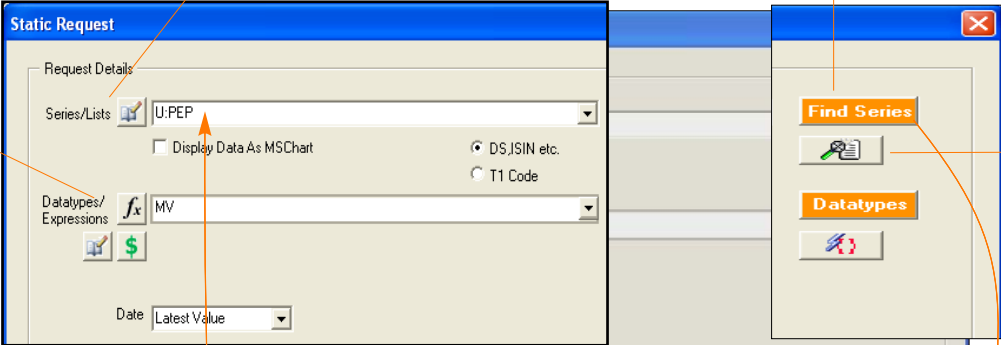
Select the **Editor** button to edit multiple series (or expressions)

Select the series.  
Click the **Series navigation** button to display **Datastream Navigator**.

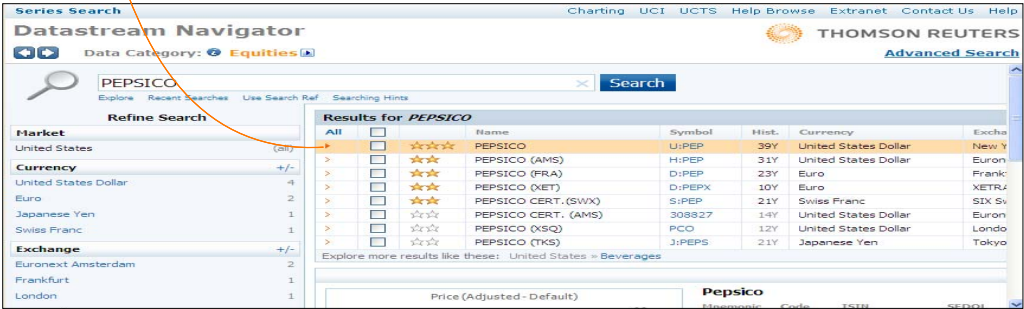
Select the **Fx** button for immediate access to the Datastream functions.

The series chosen is displayed in the **Series** field.

You can also select lists of series, and expressions.



Select the series you want from the list. See Selecting the series, page 15.



3  
Select the datatype.  
Click the **Datatype navigation** button to display **Datastream Navigator**.

Currency option helps you to choose the currency

The datatypes chosen are displayed in the **Datatype** field.

4  
Select the datatype you want from the list. See **Datatypes**, page 24.

The screenshot displays the Datastream Navigator interface. At the top, the 'Static Request' dialog is open, showing 'Series/Lists' as 'U:PEP' and 'Datatypes/Expressions' as 'MV'. A currency icon (\$) is visible next to the 'Datatypes/Expressions' field. Below this, the 'Options' section includes checkboxes for 'Display Row Titles', 'Display Column Titles', 'Display Headings', 'Transpose Data', 'Display Code', 'Display Currency', 'Display Latest Value First', 'Hyperlink to Series Metadata', and 'Hyperlink to Datatype Definition'. The 'Display Expression' section has radio buttons for 'Description' and 'Number'. The 'Display Datatype' section has radio buttons for 'Description' and 'Mnemonic'. The 'Embed' checkbox is checked. The 'Auto Refresh' checkbox is checked. The 'Visible button' checkbox is checked. The 'Date' field is set to 'Latest Value'. The 'Find Series' button is highlighted. The 'Datatypes' button is highlighted. The 'Datastream Navigator' window is open, showing the 'Datatype Search' section. The 'Data Category' is set to 'Equities'. The search results table lists various datatypes with their names and mnemonics.

Name	Mnemonic	Datatype
Depository Ratio	DRATIO	Time Sei
Market Value (Capital)	MV	Time Sei
Market Value For Company	MVC	Time Sei
Net Asset Value	NAV	Time Sei
Number Of Trades	NT	Time Sei
Price - Official List	OP	Time Sei
Price (Adjusted - Default)	P	Time Sei
Price (Adjusted) (Unpadded)	PS	Time Sei

Select the date.  
Type the date of the data you want in the **Date** field in the format mm/dd/yy, or as a relative date from today.

For example, -6m for 6 months ago from today.

Select the display options.

The screenshot shows the 'Static Request' dialog box. The 'Request Details' section includes a 'Series/Lists' dropdown set to 'U:PEP', a 'Display Data As MSChart' checkbox (unchecked), a 'Datatypes/Expressions' dropdown set to 'MV', and a 'Date' dropdown set to 'Latest Value'. The 'Options' section contains a list of checkboxes: 'Display Custom Header' (unchecked), 'Display Row Titles' (checked), 'Display Column Titles' (checked), 'Display Headings' (unchecked), 'Transpose Data' (checked), 'Display Code' (unchecked), 'Display Currency' (unchecked), 'Display Latest Value First' (unchecked), 'Hyperlink to Series Metadata' (unchecked), and 'Hyperlink to Datatype Definition' (unchecked). The 'Display Expression' section has 'Description' selected. The 'Display DataType' section has 'Description' selected. The 'Embed' section has 'Embed', 'Auto Refresh', and 'Visible button' all checked. On the right side, there are 'Find Series' and 'Datatypes' buttons. At the bottom right, there are 'Submit' and 'Cancel' buttons.

### Row Titles

Displays the series code at the left of each series.

### Column Titles

Displays the datatype mnemonic or expression at the top of the column for each datatype.

### Headings

Displays a general heading for row and column headings. For example, the date of the request.

### Currency

Displays the traded currency for each selected series.

### Expression

Display the expression description or number.

### Transpose

Displays the series data in rows instead of columns.

### Display Thomson ONE code

Displays the Thomson ONE code for the series selected.

### Embed

The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

### Auto Refresh

Refreshes the request automatically when you open the spreadsheet.

### Visible button

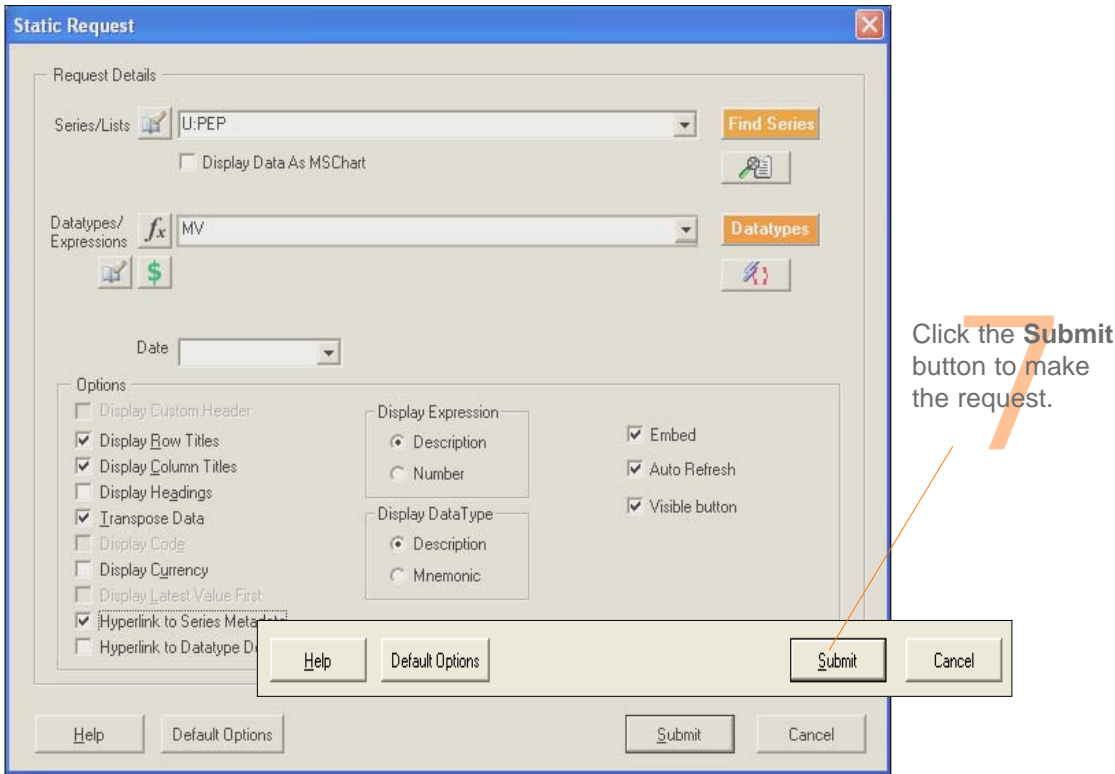
Displays the **Refresh** button with the request results. You can use the **Request Manager** to refresh requests, see page 49.

### Series Metadata

Adds a hyperlink to the series code to link to the classifications and metadata pages from Navigator for the series (also enable series that are now dead or inactive to be identified in your workbook).

### Hyperlink to Datatype Definition

Add links to the datatype to display the definition from Navigator.



The values for the datatypes selected are displayed for the date selected.

A	B	C	D	E
Refresh				
Type	MV	T1 CODE	CURRENCY	
U:PEP	98224.25	PEP-US	U\$	

To refresh the request, click on the **Refresh** button.  
To edit the request, right click on the button and select the Edit option

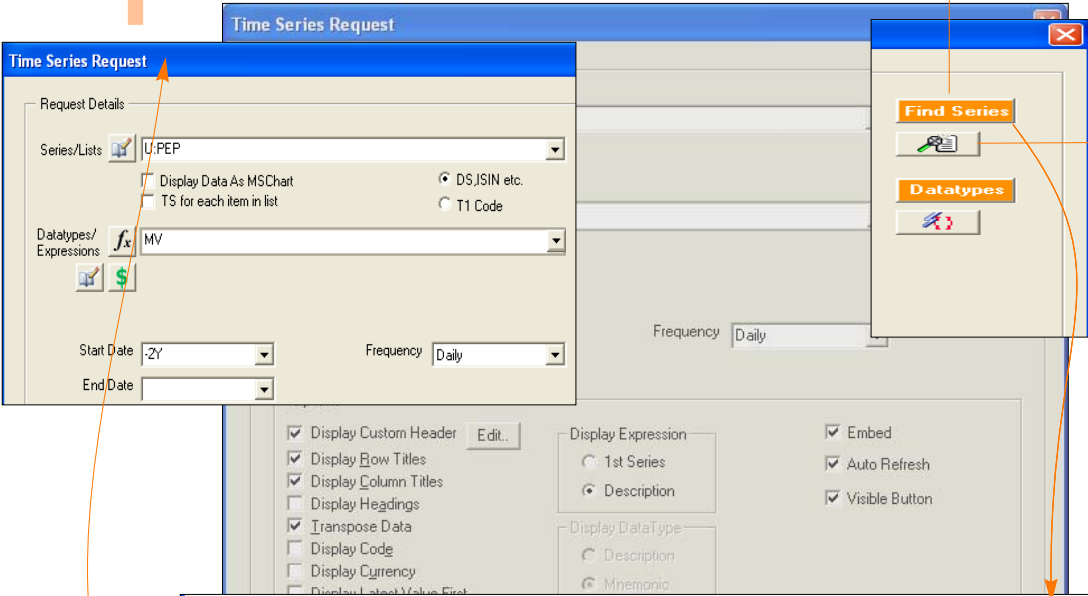


# MAKING A TIME SERIES REQUEST

Select **Time Series Request** from the **AFO** menu.

Select the series.  
Click the **Series navigation** button to display **Datastream Navigator**.

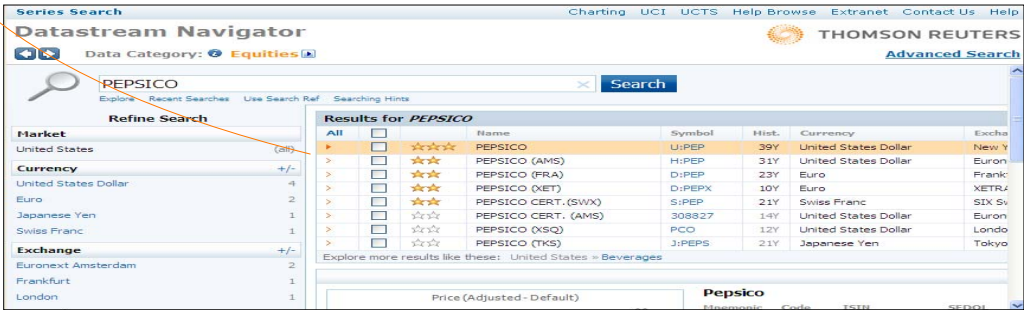
You can also select lists of series and expressions.



The series chosen is displayed in the **Series** field.



Select the series you want from the list. See **Selecting the series**, page 15.



Or to display time series for a list of series

Select **Time Series Request** from the **AFO** menu.

The screenshot shows the 'Time Series Request' dialog box. It has several sections: 'Request Details' with 'Series/Lists' set to 'U:PEP' and 'Datatypes/Expressions' set to 'MV'; 'Options' with various checkboxes like 'Display Custom Header' and 'Display Row Titles'; and 'Display Expression' and 'Display DataType' sections. A callout box on the right, labeled with a large orange '2', contains 'Find Series', 'Datatypes', and 'Data' buttons. An arrow points from the 'Find Series' button to the 'List Picker' dialog box at the bottom right. The 'List Picker' shows 'Local Lists' and 'User Created Mainframe Lists' tabs, with a list of series names: 'Vendors of Information', 'Banks UK', 'Chemicals FR', and 'French Automobile Industry'. Another arrow points from the 'TS for each item in list' checkbox in the 'Time Series Request' dialog to the text 'Click TS for each item in the list to get Time Series for each item.'

Click on the List Picker button


Click TS for each item in the list to get Time Series for each item.

Click on the List you require and click **OK**.


Select the datatype.  
Click the **Datatype** navigation button to display **Datastream Navigator**.


**Time Series Request**

Request Details

Series/Lists  U:PEP

☐ Display Data As MSChart ☒ DS,JSIN etc.  
☐ TS for each item in list ☐ T1 Code

Datatypes/Expressions  MV

 \$

Start Date -2Y Frequency Daily


End Date

Currency option helps you to choose the currency


The datatype chosen is displayed in the **Datatype** field.

Select the datatype you want from the list. See Datatypes, page 24.

**Find Series**




**Datatypes**



Start Date -2Y Frequency Daily

End Date

Options

☒ Display Custom Header  Edit..

☒ Display Row Titles

☒ Display Column Titles

☐ Display Headings

☒ Transpose Data

☐ Display Code

☐ Display Currency

☐ Display Latest Value First

☐ Hyperlink to Series Metadata

☐ Hyperlink to Datatype Definition

Display Expression

☐ 1st Series

☒ Description

Display Datatype

☐ Description

☒ Mnemonic



☒ Embed

☒ Auto Refresh

☒ Visible Button

**Datastream Navigator**

**Datatype Search**

Data Category:  **Equities** 

Find  Name  Contains  And  Name  Contains

	Name	Mnemonic Datatype	
<input checked="" type="checkbox"/> All			
<input checked="" type="checkbox"/> Key Datatypes			
<input type="checkbox"/> Datastream			
<input type="checkbox"/> Time Series			
<input checked="" type="checkbox"/> Pricing			
<input type="checkbox"/> Earnings			
<input type="checkbox"/> Dividends			
<input type="checkbox"/> Number of Shares			
<input type="checkbox"/> Corporate Actions			
<input type="checkbox"/> Fundamentals			
<input type="checkbox"/> Depository Ratio	DRATIO	Time Ser	
<input type="checkbox"/> Market Value (Capital)	MV	Time Ser	
<input type="checkbox"/> Market Value For Company	MVC	Time Ser	
<input type="checkbox"/> Net Asset Value	NAV	Time Ser	
<input type="checkbox"/> Number Of Trades	NT	Time Ser	
<input type="checkbox"/> Price - Official List	QP	Time Ser	
<input type="checkbox"/> Price (Adjusted - Default)	P	Time Ser	
<input type="checkbox"/> Price (Adjusted) (Unpadded)	P#S	Time Ser	

Select the date.  
Type the date of the data you want in the **Date** field in the format dd/mm/yy, or as a relative date from today. For example, -2Y for 2 years ago from today.

Select the display options.

**Time Series Request**

**Request Details**

Series/Lists: U:PEP

☐ Display Data As MSChart ☒ DS,JSIN etc. ☐ T1 Code

☐ TS for each item in list

Datatypes/Expressions: MV

Start Date: -2Y Frequency: Daily

End Date: Intraday Value

**Options**

☒ Display Custom Header

☒ Display Row Titles

☒ Display Column Titles

☐ Display Headings

☒ Transpose Data

☐ Display Code

☐ Display Currency

☐ Display Latest Value First

☐ Hyperlink to Series Metadata

☐ Hyperlink to Datatype Definition

**Display Expression**

☐ 1st Series ☒ Description

**Display Data Type**

☐ Description ☒ Mnemonic

**Embed**

☒ Embed ☒ Auto Refresh ☒ Visible Button

**Find Series** **Datatypes**

### Custom headers

A set of static datatypes can be selected to display as the column headings

### Row Titles

Displays the series code at the left of each series.

### Column Titles

Displays the datatype mnemonic or expression at the top of the column for each datatype.

### Headings

Displays a general heading for row and column headings. For example, the date of the request.

### Currency

Displays the traded currency for each selected series.

### Expression

Display the first series mnemonic or description.

### Transpose

Displays the series data in rows instead of columns.

### Display Latest Value First

Displays the most recent value first

### Embed

The request is embedded as a dynamic, refreshable object when saved. If this is not selected, the results cannot be refreshed.

### Auto Refresh

Refreshes the request automatically when you open the spreadsheet.

### Visible button

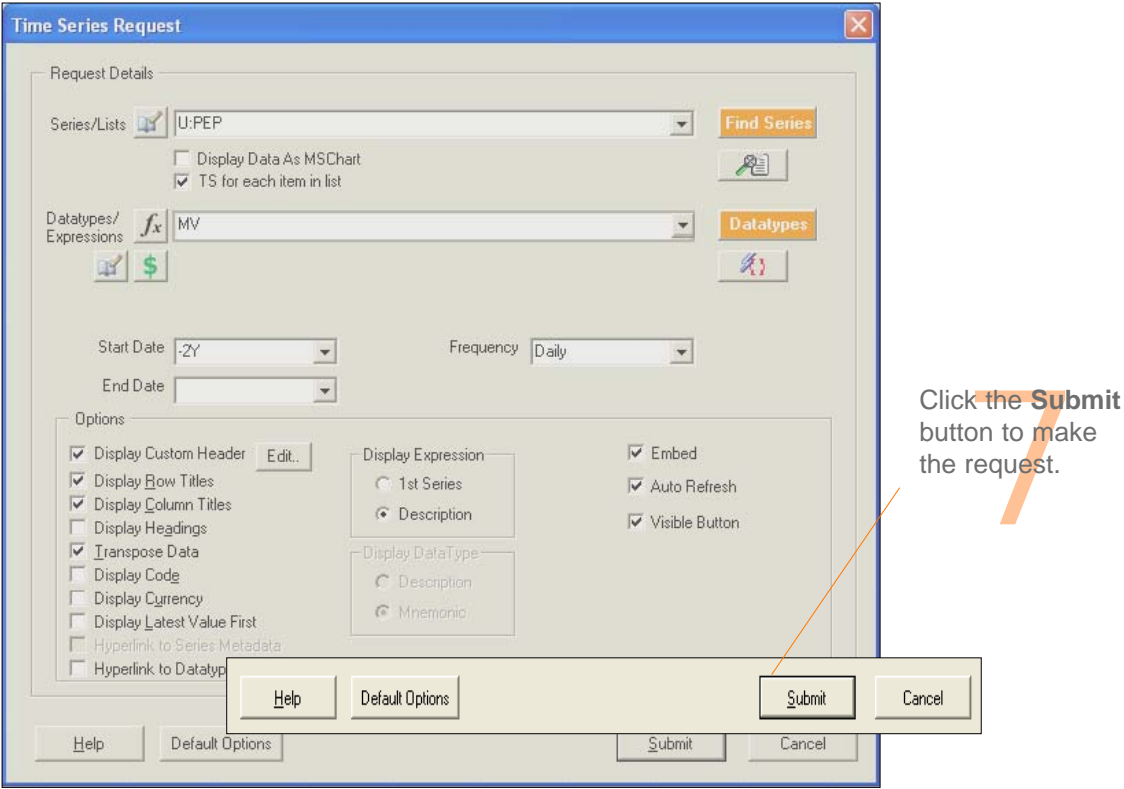
Displays the **Refresh** button with the request results. You can use the **Request Manager** to refresh requests, See page 49.

### Series Metadata

Adds a hyperlink to the series code to link to the classifications and metadata pages from Navigator for the series (also enable series that are now dead or inactive to be identified in your workbook).

### Hyperlink to Datatype Definition

Add links to the datatype to display the definition from Navigator.



The values for the datatypes selected are displayed for the date selected.

A	B	C	D	E	F	G	H
Start	11/28/2003						
End	11/29/2005						
Frequency	D						
Name	CURRENCY	11/28/2003	12/1/2003	12/2/2003	12/3/2003	12/4/2003	12/5/2003
PEPSICO	U\$	82609.81	83622.69	82644.13	81888.75	82661.31	83262.19

To refresh the request, click on the **Refresh** button.

## USING THE REQUEST MANAGER

Use the Request Manager to manage the requests in your worksheet. The Request Manager lists all the requests in your worksheet. You can find, edit, refresh, and delete requests.

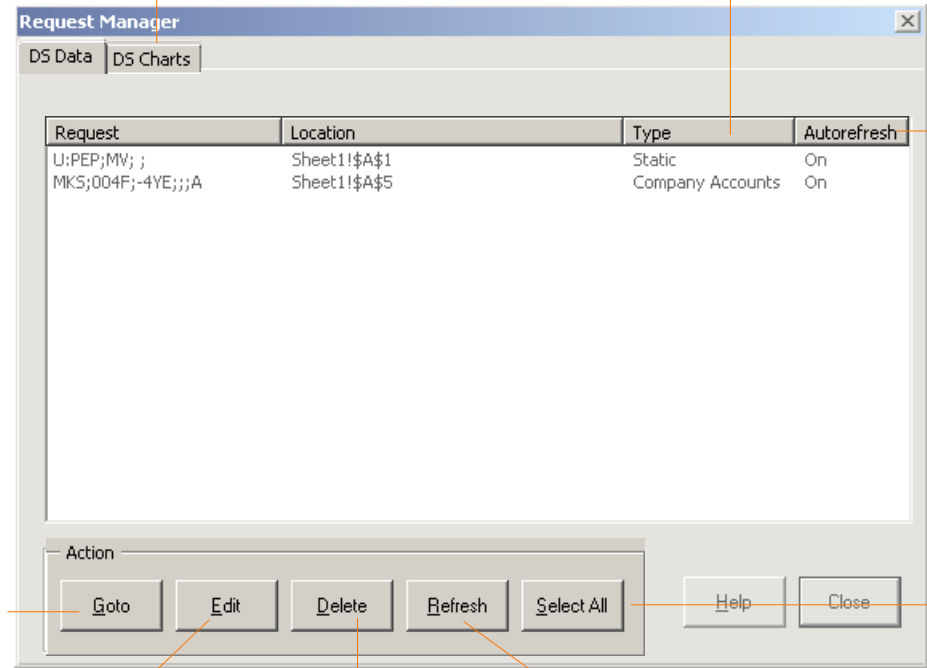
1  
Select **Request Manager** from the **AFO** menu.

Select either data or chart requests.

2  
Select the request and click the appropriate button to Goto, Edit, Delete, or Refresh the request.

Click to turn **Autorefresh** on or off for the selected requests.

Click to locate and display the selected request in the worksheet.



Click to display the **Request Details** dialog for editing.

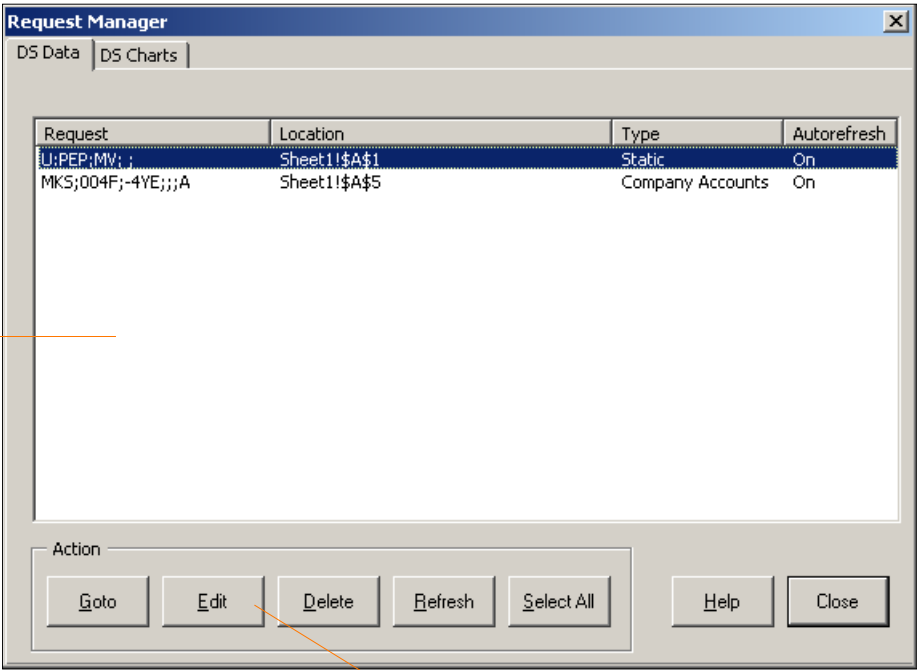
Click to delete the selected request.

Click to refresh the data in the selected requests.

Click to select all the requests displayed. This is useful if you want to refresh, or delete, all requests.

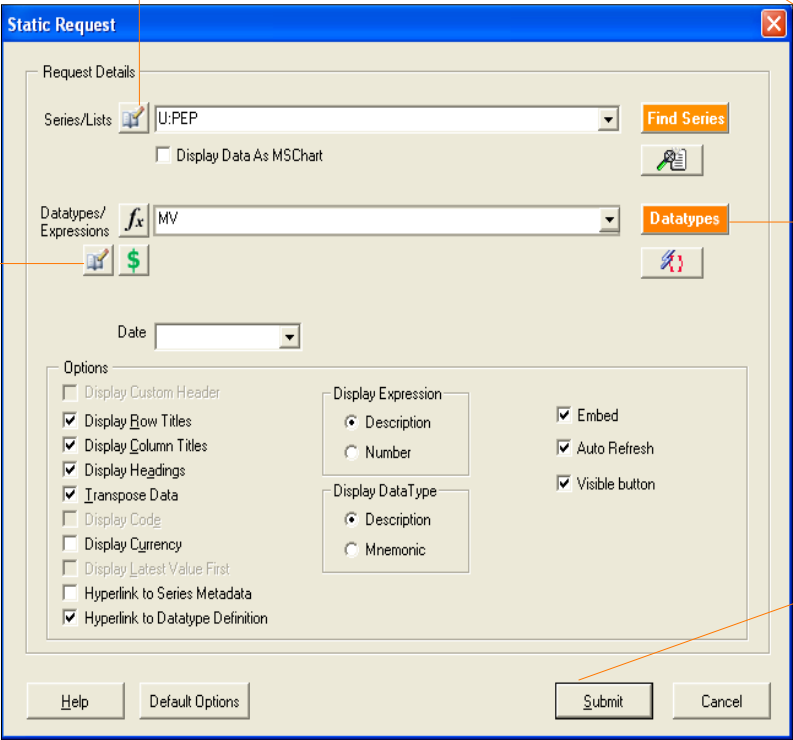
To edit a request, for example, select the request you want to edit.

The Editor option enables multiple series or datatypes/functions/expressions to be easily reviewed, edited and extended with links to the metadata.



Click the **Edit** button. The **Request Details** dialog is displayed.

Make your changes and click **Submit**. The original request is overwritten with the new one.











## Worked examples

---

Creating Datastream lists  
Creating a flexible chart  
Creating an equity screen

DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE

Lists are a good way to make report, chart, and data requests for group of series that you use frequently. Instead of making individual requests, you can make one request to get results of all the series you are interested in. Once you have created your lists, you can edit them to reflect any changes in the group of series. You can use the Request or Project screens to refresh your lists in Datastream, or the Request Manager to refresh them in AFO.

## CREATING A LIST OF AUTOMOBILE COMPANIES

Click the **User Created** option in **Data Category** window

Select the **Local Lists** data category.

Click the **List Wizard** button.

Select **Create a new list.**

Finish

## Finish

Click the **Series navigation** button to display Datastream Navigator.

Click the **Next** button.

Series Search

ChartingUCIUCTSHelp BrowseMy SelectionsExtranetContact UsHelp

Datastream Navigator

THOMSON REUTERS

Search

Data Category: Equities

Advanced Search

Name

Contains

BMW

And

Contains

Search Now

DS Mnemonic

Contains

DS Code

Contains

Market

Equals

Base Date (dd/mm/yyyy)

Before

Search Operator to use with m one field.- And OR

Changes on Datastream Navigator 4.2 - significant enhancements to the explorer interface - 25th Feb

Navigator 4.2 - 4 minute video on the new features

Search for the series you want in your list.

Series Search

ChartingUCIUCTSHelp BrowseMy SelectionsExtranetContact UsHelp

Datastream Navigator

THOMSON REUTERS

Advanced Search

Data Category: Equities

bmw

Search

My Basket

Refine Search

Market

Currency

Exchange

Type

Changes on Datastream

Results for bmw

All	Name	Symbol	Hist.	Market	Currency	Exchange	Type
<input type="checkbox"/>	BMW	D:BMW	39Y	Germany	Euro	Frankfurt	Equity
<input type="checkbox"/>	BMW (LON)	BMWB	17Y	United Kingdom	United Kingdom Pound	London	Equity
<input type="checkbox"/>	BRAND MARVEL WWD.CSM. PRDS.	C-BMW	14Y	Canada	Canadian Dollar	TSX Ventures	Equity
<input type="checkbox"/>	BMW (NET)	D:BMWX	20Y	Germany	Euro	XETRA	Equity
<input type="checkbox"/>	BMW (MIL)	I:BMW	4Y	Germany	Euro	Milan	Equity
<input type="checkbox"/>	BMW (BUD)	HNB:BMX	<1Y	Germany	Hungarian Forint	Budapest Stock Exchange	Equity
<input type="checkbox"/>	BMW PREF.	D:BMW3	22Y	Germany	Euro	Frankfurt	Preference Share
<input type="checkbox"/>	BMW PREF. (NET)	D:BMW3X	14Y	Germany	Euro	XETRA	Preference Share
<input type="checkbox"/>	BMW (RS)	BMW	10Y	Germany	United Kingdom Pound	London	Equity
<input type="checkbox"/>	BMW (EAS)	EA:BMW	10Y	Germany	Euro	EASDAQ	Equity

Explore more results like these: Germany » Automobiles & Parts  
United Kingdom » Unquoted equities  
Canada » Personal Goods

Price (Adjusted - Default)

70  
60  
50  
40  
30  
20  
10  
0

1980 1990 2000 2010

Sources Thomson Reuters Datastream

BMW

Mnemonic Code ISIN SEDOL Local Code

D:BMW 923537 DE0005190003 5756029 D519000

Latest Value 67.449 (EUR)

Timespan 01/01/1973 - 30/03/2012, Daily

Headline Coverage P RI (from Jan 1973) MV DY PE PI More...

Coverage WorldScope

Market Germany

Currency Euro

Exchange Frankfurt

Type Equity

Explorers Related

Germany » Automobiles & Parts  
Display Related Equity Indices  
Display Related Constituent Lists  
Display Related User Created Indices  
Display Related Options

Notes

BMW AG is a Germany-based holding company and automobile manufacturer that focuses on the worldwide automobile and motorcycle markets. The Company divides its activities into the three main segments Automobiles, Motorcycles and Financial Services. It owns three brands: BMW, MINI and Rolls-Royce. Its BMW automobile range encompasses the 1 Series, including three-door, five-door, coupe and convertible models; the 3 Series, including sedan, touring, coupe and convertible models; the 5 Series, available in sedan and touring models; the 6 Series, available as a coupe or convertible; the 7 Series large sedan; the Z4 roadster and coupe; the sports utility vehicles, X3, X5 and X6 and M models, such as M3, M5 and M6. It also offers cars under the MINI brand and motorcycles under the BMW brand. The Rolls-Royce brand offers three luxury cars, Phantom, Coupe and Ghost. It has producing, assembly, service and sales subsidiaries throughout the world.

© Worldscope

Click the Explorer option in the flyout to display related series

DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6

56

1 Click the **Use Selected** link to view the selected series.

9 Click the check box to select the series.

Series Search

Charting UCI UCTS Help Browse Extranet Contact Us He

Datastream Navigator

THOMSON REUTERS

Data Category: Equities

Advanced Search

Exploring Equities » Germany » Automobiles & Parts

My Basket

Refine Search

All Results

Text

Search

Market

Germany (all)

Currency

Euro

Exchange

Frankfurt

Type

Equity

Preference Share


Activity

Active

1-23 of 23

All		Name	Symbol	Hist.	Type
>	<input type="checkbox"/>	★★★★ AUDI	D:NSU	39Y	Equity
>	<input type="checkbox"/>	★★★★ BBS KRAFTFAHRZEUGTECHNIK PREF.	D:BKS3	24Y	Preference Share
>	<input checked="" type="checkbox"/>	★★★★ BMW	D:BMW	39Y	Equity
>	<input type="checkbox"/>	★★★★ CONTINENTAL	D:CON	39Y	Equity

Price (Adjusted - Default)



Source: Thomson Reuters Datastream

P RI MV DY PE PI

All Last

BMW

Mnemonic Code ISIN SEDOL Local Code

D:BMW 923537 DE0005190003 5756029 D519000

Latest Value

65.525 (EUR)

Timespan

01/01/1973 - 29/03/2012, Daily

Headline Coverage

P RI (from Jan 1973) MV DY PE PI More...

Coverage

WorldScope

Market

Germany

Currency

Euro

Exchange

Frankfurt

Type

Equity

Reorder

Esc key closes this window

by Name

Prev Next

Select the **Upload** option to add the list to the Datastream database, where it is stored as an L# list. You can also save as a UCI (X#) list. If you do not upload, the list is stored on your local drive or server.

12  
Type the description and name for your list

**List Wizard**

Data Category: equities

Find:  **Find Series**

Expert Entry ☐  **+**

Select a Data Category for the List you are creating.  
equities

Name	Mnemonic
AUDI	D:NSU
BMW	D:BMW
<b>VOLKSWAGEN</b>	<b>D:VDW</b>
PORSCHE AML.HLDG.PREF.	D:PAH3

List Description: German Automobiles

**Help** **Cancel** **< Back** **Next >** **Finish**

11  
Click **Next**.

13  
Click the **Finish** button.

Again there is an option to remove the series from the list. Click the minus sign to remove the series.

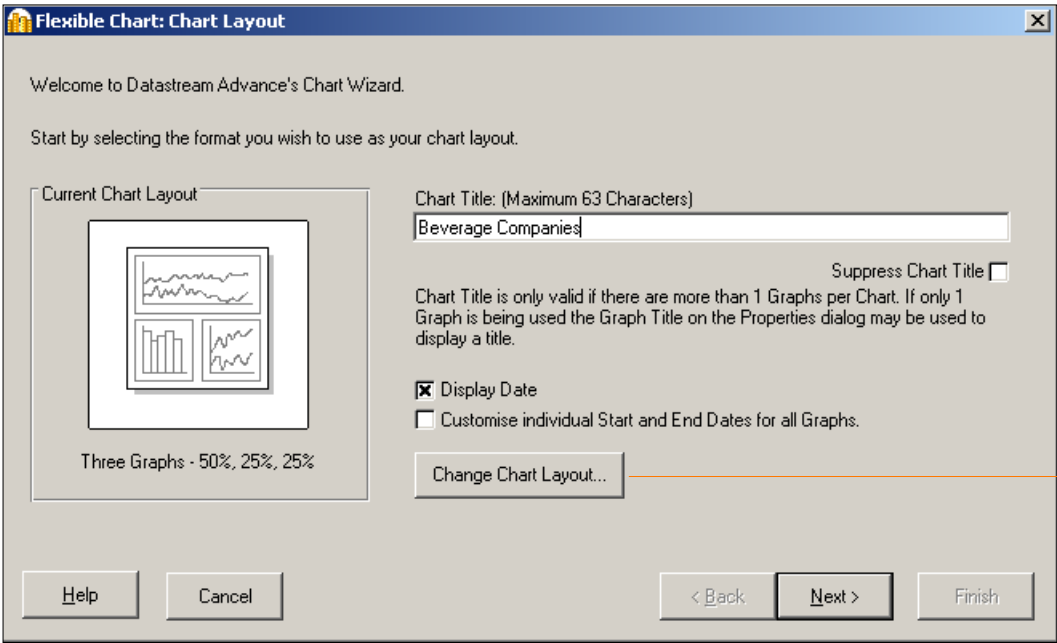




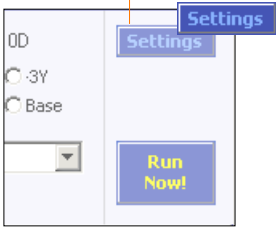


Repeat steps 3-5 for each series, you should have:

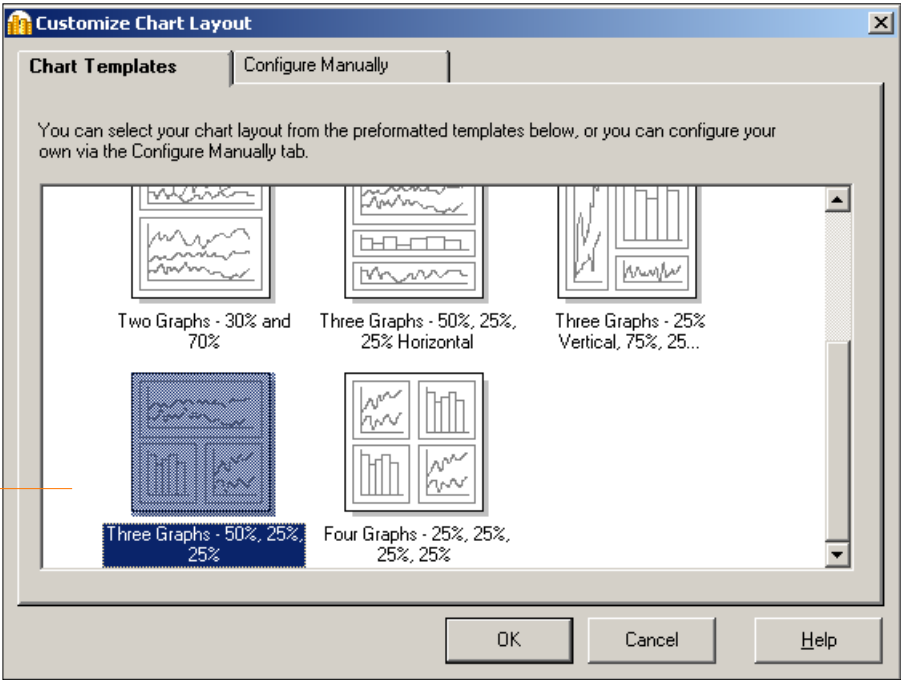
- Coca-Cola - Price
- Pepsi - Price
- Coca-Cola - Dividend Yield
- Pepsi - Dividend Yield
- Coca-Cola -Market value
- Pepsi - Market value
- S&P EUROPE 350 FOOD BEV & TOB - Price Index



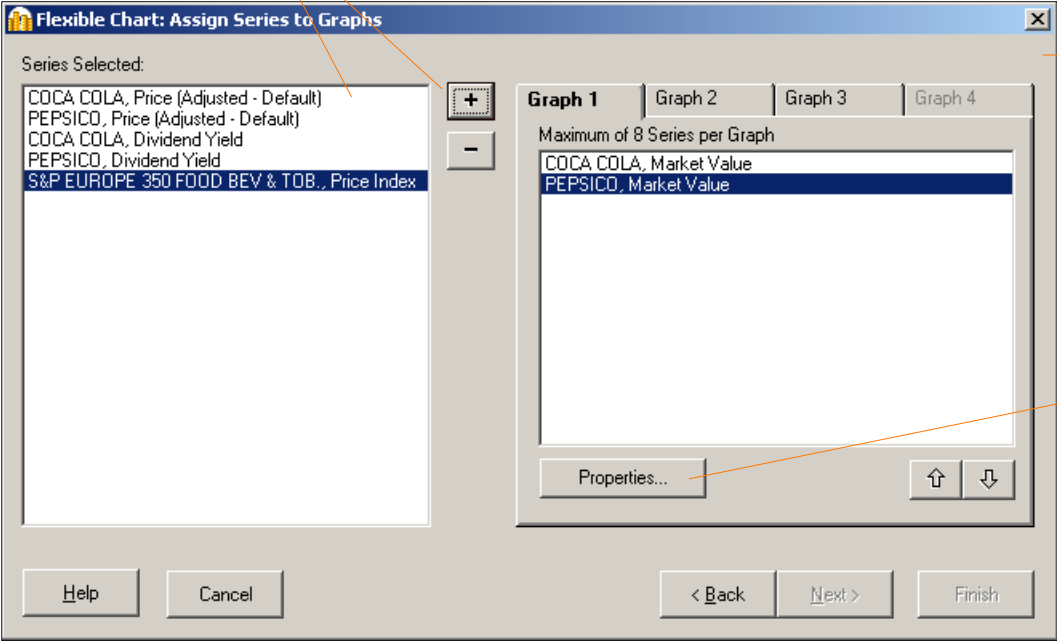
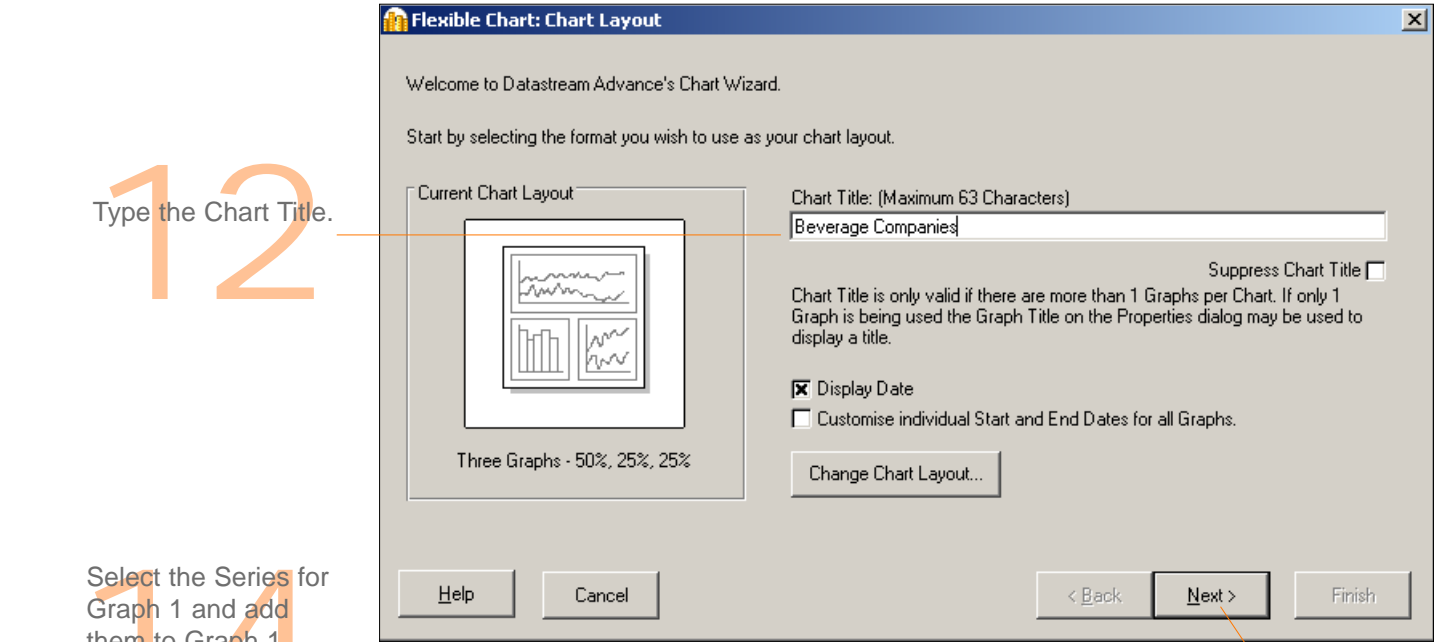
Click the **Settings** button.  
The **Flexible Chart Wizard** is displayed.

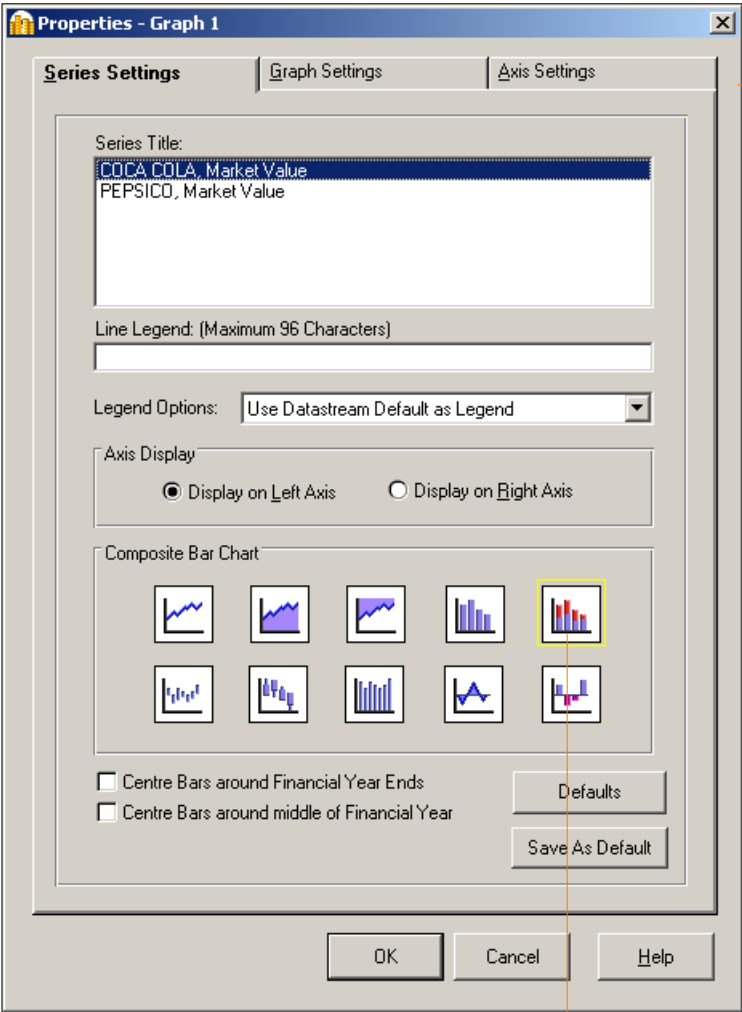


Click the **Change Chart Layout** button.  
The **Customise Chart Layout** dialog is displayed.

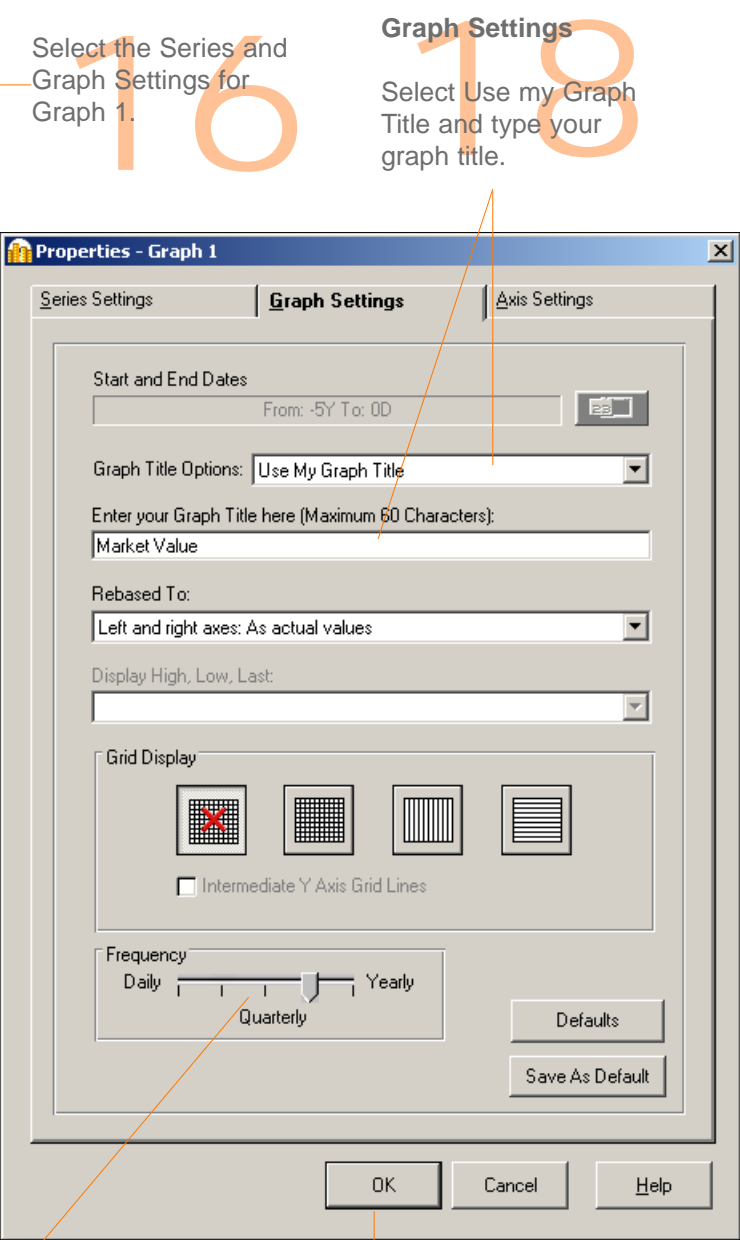


Select three graphs and click **OK**.



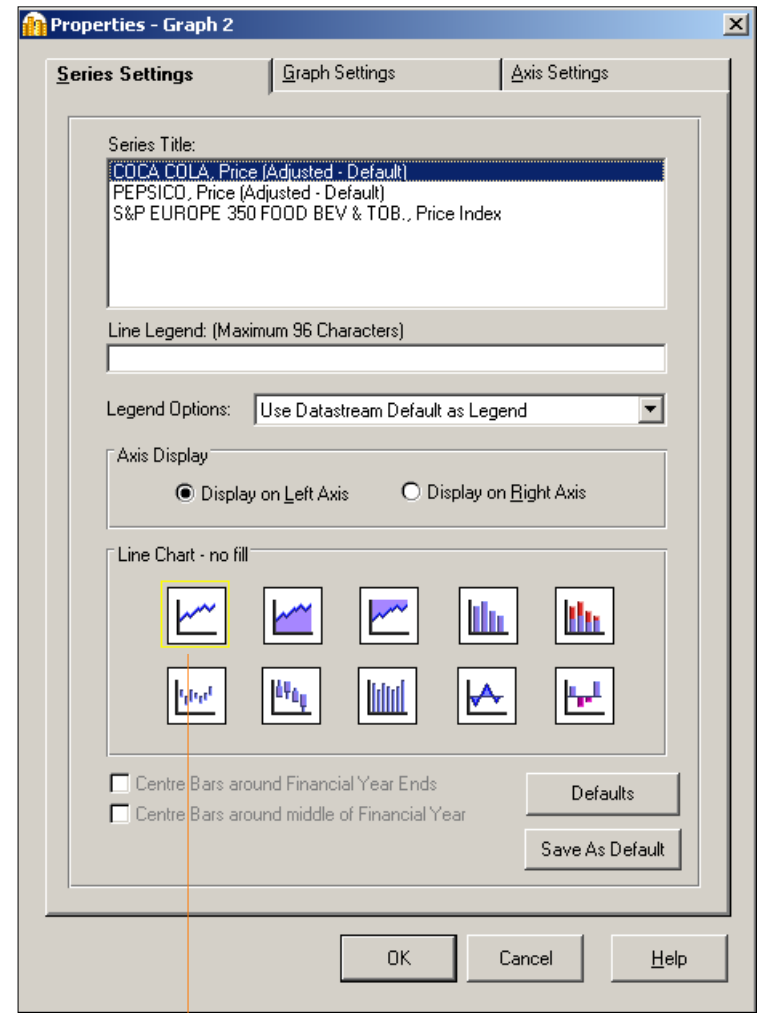


**Series Settings**  
Select the type of chart for each series:  
Composite bar chart.



Select the data  
Frequency.

Click **OK**.

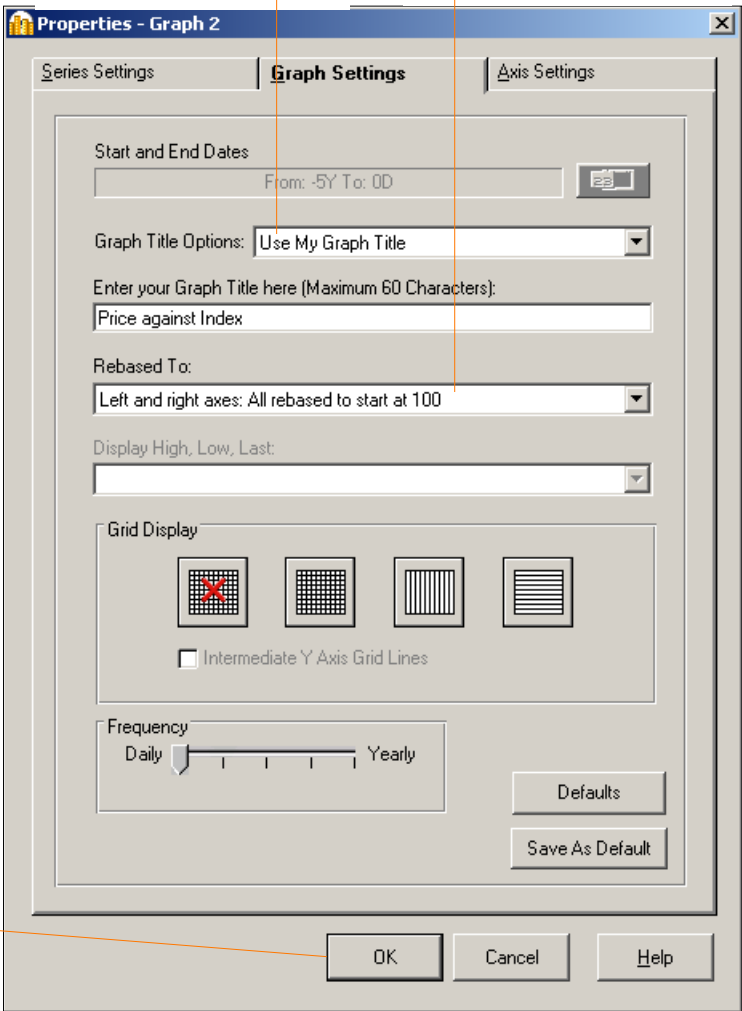


Line Chart

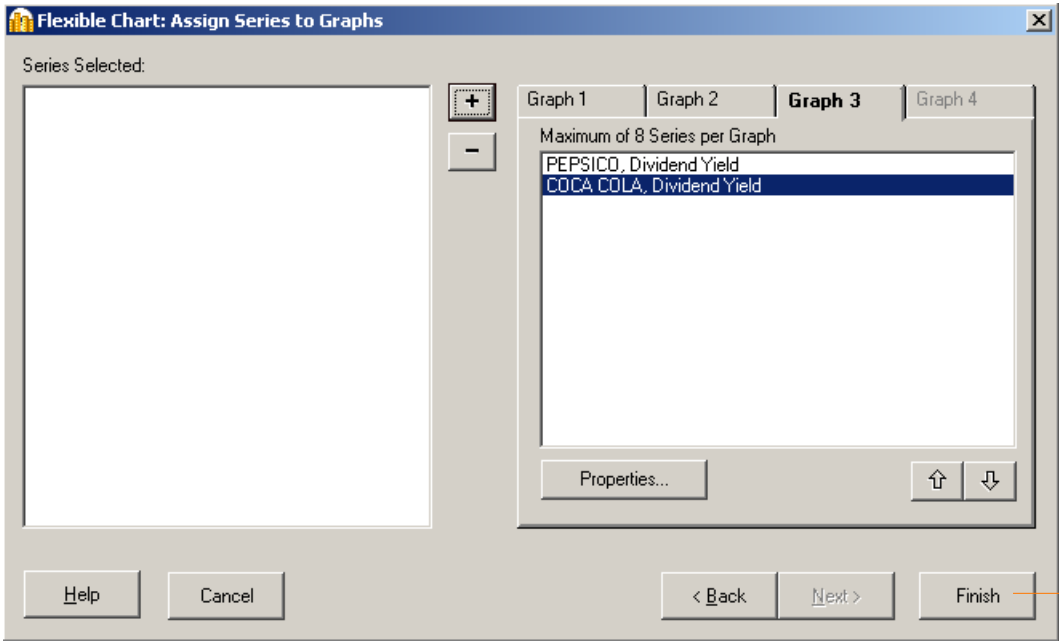
21  
Select the Series and Graph settings for graphs 2 and 3.

Select Use my graph title and type the title.

Rebase to 100 for graph 2.  
(Do not rebase graph 3)



22  
Click OK.



Click **Finish**.

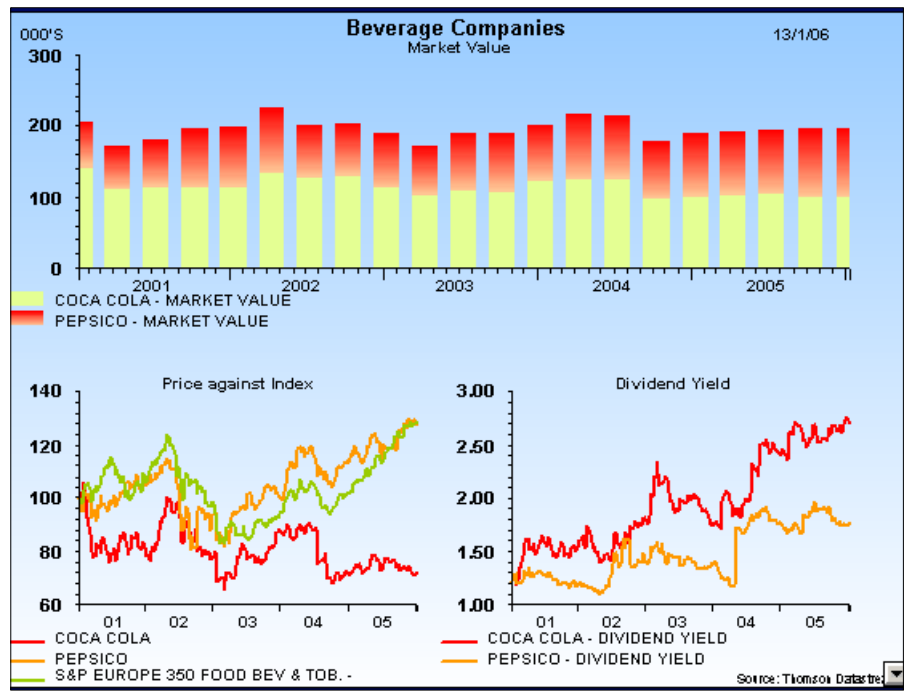
23




Click **Run Now**

24

The results are displayed.



- You can:
- Change the chart properties: Right Click on the chart and select Properties... - then select Icharts from the Scheme dropdown at the top
  - Edit the chart settings; click the **Settings** button
  - Edit the chart using Annotations; Click **Annotations** icon  in the tool bar.
  - Save the flexible chart as a Project; select **File>Save As**
  - Transfer or Export it; select **Tools>Transfer** or **Tools>Export**
- For more information, see the Datastream Help.

## CREATING AN EQUITY SCREEN

Equity screening enables you to search the entire global equities database of over 60,000 stocks, or across a region, such as the euro zone, or a single market. You can store your search to edit and re-run at a later date. You can save the results in a list for analysis in Datastream or AFO.

For more information about equity screening and what you can do with them, see the *Datastream Help*.

## CREATING AN EQUITY SCREEN

DATASTREAM

File Edit View Tools Help

TOTAL MATCHES = 4

Currency = Euro

Data Type	Limitation	Unit	No. of Matches
Market Value	OVER1	Billions	122
Industry Classification	AUTOS, AUPRT	Default	22

Name	Market Value	Industry Classification
FAURECIA	1.31	AUPRT
VALEO	2.48	AUPRT
PEUGEOT	11.84	AUTOS
RENAULT	19.35	AUTOS

Format Code

Description

List File

A407

French Automobile Indus

C:\pro

Allow Column & Row Resizing In Search Report

Find

Edit Search...

New Search

Request

Project

Equity Screening

Click the New Search button.



3  
Select France  
from the  
Country tab.

DataStream Search Wizard

Search By

Country

Constituent

Lists

Build a Country based search by selecting either Country Codes or Composite Codes, or by typing in a simple expression.

Country Codes:

ARGENTINA  
AUSTRALIA  
AUSTRIA  
BANGLADESH  
BELGIUM  
BRAZIL  
CANADA  
CHILE  
CHINA  
COLOMBIA  
CZECH REPUBLIC  
DENMARK  
ECUADOR  
FINLAND  
FRANCE  
GERMANY

Composite Code:

AFRICA

Expert Expression (Eg: EEC - UK - FR):

Universe to search (Maximum of 10):

FRANCE

+

-

Select the Search By All option if you wish to search the entire Universe.

Search By ALL ☐

☐ Historical Search

This date can be relative or absolute.

Help

Cancel

< Back

Next >

Finish

4  
Click the Add  
button.

5  
Click the  
Next button.

Click the **Datatype navigation** button to search for and select a datatype. See Selecting a datatype, page 24.

Click the **Industry & Sector Mnemonic** tab.

Click the **Add** button.

Select the limitations: over 1 Billion.

**Datastream Search Wizard**

Search Criteria (Maximum of 10): eg: Find Equities that match Criteria 1 AND Criteria 2 AND Criteria 3 etc...

No.	Data Type	Limitation	Unit
1	Market Value (Capital)		

**Datatypes & Limitations** | Industry & Sector Mnemonics | Sort Order & Currency

**Datatype** Market Value (Capital) **Datatypes**

Limitations: OVER

Value: 1

Units: Billions

☐ Use Expression/Function

fx

Help Cancel < Back Search Now! Finish

70

14  
Select euro from the  
Currency box.

**Datastream Search Wizard**

Search Criteria (Maximum of 10): eg: Find Equities that match Criteria 1 AND Criteria 2 AND Criteria 3 etc...

No.	Data Type	Limitation	Unit
1	Market Value	OVER1000	Default
2	Mnemonic - Industry	AUTOS, AUPRT	

Datatypes & Limitations | Industry & Sector Mnemonics | **Sort Order & Currency**

Sort Order

☐ No Sort Order

☒ Ascending    Market Value

☐ Descending   

☐ Alphabetical

...and sort by Industry Group ☐

...and sort by Sector ☐

Currency (Max. 1 per search):


- Dutch Florin
- East Carribean Dollar
- ECU
- Ecuadorian Sucre
- Egyptian Pound
- Estonian Kroon
- Euro**
- Euro Synthetic (EMU11 DS Calc)
- Euro via Luxembourg Franc
- European Composite Unit
- European Currency Unit

Help    Cancel    < Back    Search Now!    Finish

15  
Select  
Ascending and  
Market value.

16  
Click the Search  
Now button.



Datastream Search Wizard

To store the results of your search as a list and report, click Finish.

☐ Allow Search List & Result to be refreshed

The list will be stored in your lists directory. The file name must end with .LLT

List File:

List Description:

Click Upload to store this List on the Datastream service

Upload

Help

Cancel

< Back

Save As List

Finish

Click the **Upload** button to save your search on Datastream.

Type the file name and description for your search and click the **Finish** button.

DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6 DATASTREAM VERSION 5.1, ISSUE 6

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## More...

- Datastream lists
- Expressions and functions
- Flexible charts
- Projects
- Schedule Night Shift
- Equity screening
- Customising charts and reports
- Web browser
- Favourites
- AFO request table
- User created indices
- User created time series
- Ribbon based UI for AFO (in MS-Office 2007 and above)



## DATASTREAM LISTS

Datastream provides flexibility in creating lists of series, such as a portfolio, a watch list, or a set of related indicators. One can analyse the series as a set or individually. Lists are a convenient way to make report, chart, and data requests using multiple series. One can create copies of Datastream's index constituent lists, remove unwanted series, reorder the list, or merge two lists to create one. The List Wizard takes you through the process effortlessly.

Online help: Select **Help >Contents >Using Datastream >Local Lists**,  
OR  
Click the **Help** button on the list wizard dialog box.

---

## EXPRESSIONS AND FUNCTIONS

Datastream's expression picker gives you access to over 50 standard functions and expressions, which one can use to form part of one's chart, report, or data requests. For example, find the percentage change in share price over 12 months.

Datastream's expression builder enables one to create and edit one's own expressions, which one can keep and access through the expression picker for future use.

Online help: Select **Help >Contents >Using Datastream >Expressions and functions**,  
OR  
Click the **Help** button on the expression picker, or expression builder dialog boxes.

## FLEXIBLE CHARTS

Flexible chart gives one the freedom and flexibility to create one's own tailor-made chart layouts. Datastream provides for comprehensive customisation of all aspects of one's graphs.

Flexible Chart is particularly good for creating multiple chart layouts with multiple series using a variety of different chart types and styles.

Online help: Select **Help >Contents >Using Datastream >Flexible Chart**

---

## PROJECTS

Datastream Projects enable one to save one's analysis and automate printing and exporting charts.

One can schedule projects to update at a future time and to print or export the updated requests in a range of graphics or spreadsheet formats.

Online help: Select **Help >Contents >Using Datastream > Projects**

## SCHEDULE NIGHT SHIFT

Datastream scheduling enables you to refresh your projects at a future time and on a regular basis. For example, you can refresh your projects overnight giving you access to updated charts, reports, and data the following morning.

Online help: Select **Help >Contents >Using Datastream >Schedule Night Shift**

---

## EQUITY SCREENING

Equity screening enables you to search the entire global equities database of over 60,000 stocks, or across a region, such as the euro zone, or a single market. You can store your search to edit and re-run at a later date. You can save the results in a list for analysis in Datastream or AFO. For a worked example, see page 67.

Online help: Select **Help >Contents >Using Datastream >Equity Screening**

## CUSTOMISING CHARTS AND REPORTS

You can customise your charts and reports using properties and annotations. You can change the text, line, and fill styles, and save your styles in a template for future use.

Online help: Select **Help >Contents >Using Datastream >Annotating charts and reports**

---

## WEB BROWSER

The embedded browser links you directly to user support through the Datastream Research Extranet.

Online help: Select **Help >Contents > Using Datastream >Web Browser**

## FAVOURITES

Favourites enables you to store your chart or report request with its settings, for example, dates, datatype, currency, etc. You can save them with unique names and select them from a drop down list.

Online help: Select **Help >Contents >Using Datastream >Favourites**

---

## AFO REQUEST TABLE

The request table enables you to manage groups of refreshable requests. You can view the details of all your requests together. You can schedule the table to be updated at a future time or overnight. You can select which requests you want to update.

Online help: Select **Help >Help Contents >Datastream Advance for Office > Using Request Table**

## USER CREATED INDICES

The UCI Manager enables you to create and maintain your own indices. Each index is based on a list of constituent series, which you specify as the first step of creating an index. Once created, an index can be automatically maintained for you, with new values calculated daily.

Online help: Select **Help >Contents >Using Datastream >User Created Indices**

---

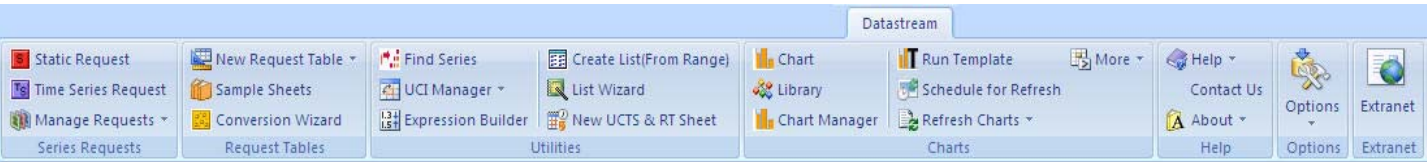
## USER CREATED TIME SERIES























A user time series is a series of values (data) for different points in time created by you and uploaded for storage on Datastream. The values can be daily, weekly, monthly, quarterly, or yearly and you can save the series in management groups to help you organise them. You can use these series in Datastream and AFO charts and reports. You can combine them with Datastream maintained series and use functions and expressions to manipulate them. An Excel template is used to create and edit your time series. You can download an existing series to form the basis of a new one.

Online help: Select **Help >Contents >Using Datastream >Favourites**

## RIBBON BASED UI FOR AFO (IN MS-OFFICE 2007 AND ABOVE)

When you install AdvanceOffice.xlam and the Charting Addin component, Datastream is available as an Add-In tab. Datastream provides following facilities in the form of seven separate groups.



- **Static Request**  
Create a one off or embedded request for a series or list at one point in time.
- **Time Series Request**  
Create a one off or embedded request for a series or list at one point over time.
- **Manage Requests**  
Create requests for fundamentals information and view, update and edit your embedded requests.
- **New Request Table**  
Open a new Request Table to create manage and update spreadsheets.
- **Sample Sheets**  
Access a library of spreadsheets.
- **Conversion Wizard**  
Upgrade spreadsheets to the latest version.
- **Find Series**  
Find the series you require.
- **UCI Manager**  
Create, calculate and select User Created Indices.
- **Expression Builder**  
View and create saved expressions.
- **Create List (From Range)**  
Create a local central system or UCI.
- **List Wizard**  
Create local lists using series from navigator.
- **New UCTS sheet**  
Open a new User Created Time Sheet.
- **Chart**  
Open new chart window.
- **Library**  
Open new library window.
- **Chart Manager**  
Open Chart Manager to refresh, edit, apply style, remove links, delete and upload charts.
- **Run Template**  
Get the latest charts associated to particular Templates in your current spreadsheet.
- **Schedule for Refresh**  
Schedule Charts or Chart Templates for Refresh.
- **Refresh Charts**  
Refresh selected / all charts with the latest data.
- **More**  
Open more chart pages (Key Indicators, Overview, Reports) in a new window.
- **Help**  
Access Online help contents, Definitions, Contact Us link and Version details.
- **Options**  
Configure a range of settings and defaults.
- **Extranet**  
Access the Extranet.









## Support



Manuals  
Online Help  
AFO sample  
Telephone support  
Account management  
Research Extranet support site  
Training

FURTHER SUPPORT

Datastream has a comprehensive documentation set to support you. This comprises a complete set of manuals, online help, and interactive options to get you started.

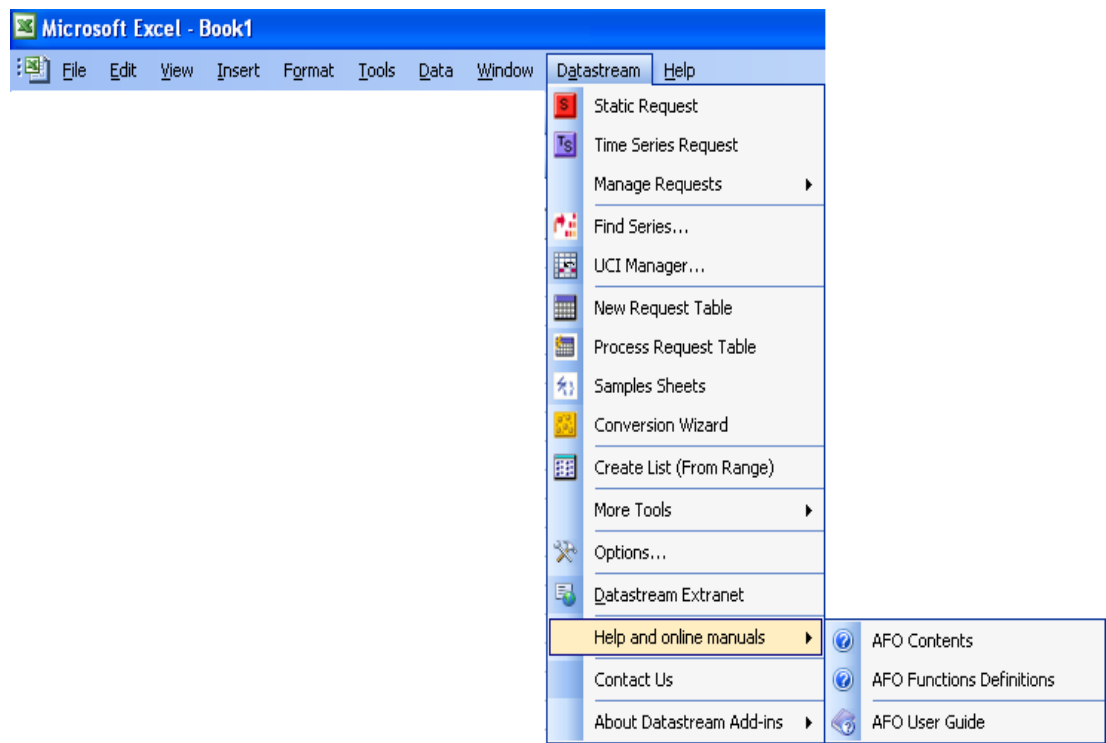
MANUALS

A set of Datastream 5.1 help is available from the Help menu, select online manuals. These are provided as fully bookmarked Adobe Acrobat PDF files. You can browse, select, read, and print the sections you are interested in.



- **Getting started** - A brief guide to getting started with the basics of Datastream.

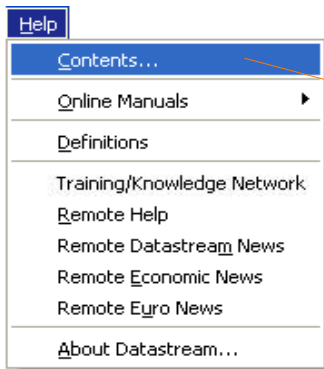
A set of AFO 5.1 user guides is available from the AFO menu in Excel, Word, and PowerPoint: select Online Manuals.



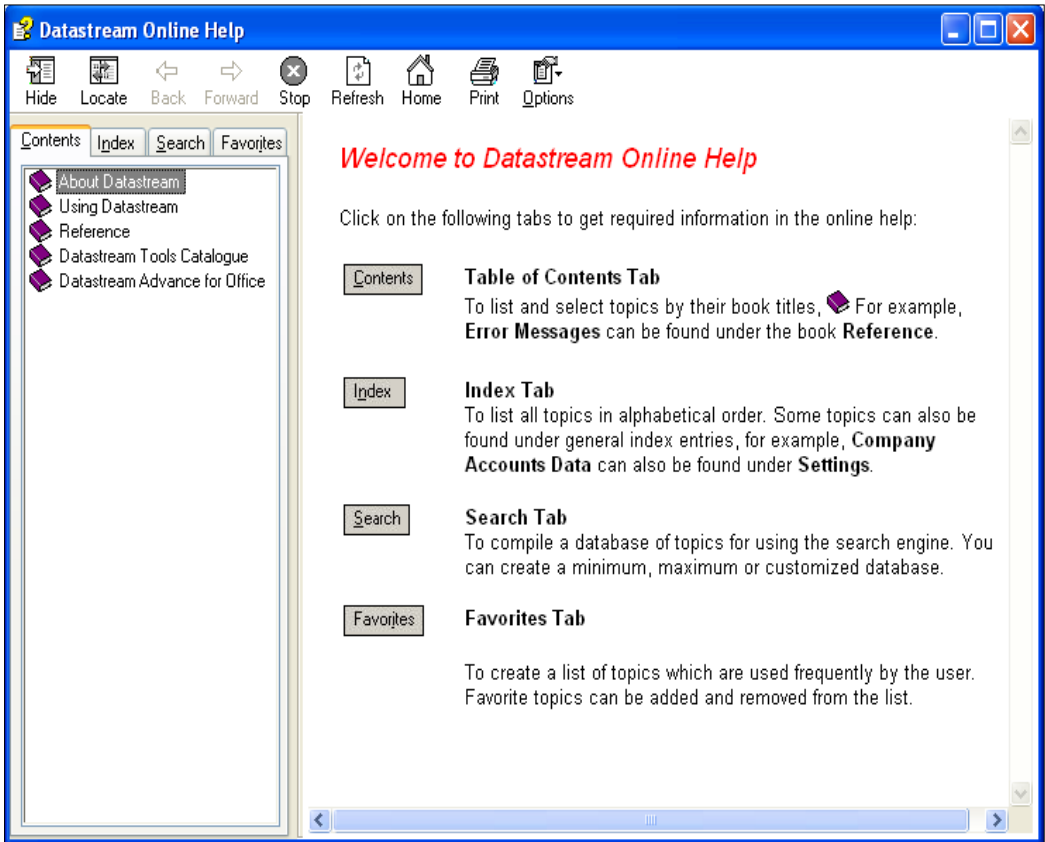
- **User guide Excel** - A comprehensive guide to using AFO with Excel.
- **User guide Word** - A comprehensive guide to using AFO with Word.
- **User guide PowerPoint** - A comprehensive guide to using AFO with PowerPoint.

## ONLINE HELP

A comprehensive online help system is available from the Help menu: select Contents. You can also access context sensitive Help from most of the dialog boxes within Datastream.



Select **Contents** from the **Help** menu.  
The **Online Help** opening screen is displayed.



DataStream Advance for Office samples illustrate how the different DataStream content sets can be used in a range of different workflows. You can access AFO sample from Word, Excel or PowerPoint.

The screenshot shows the Datastream application's Help menu open, highlighting "AFO Samples". The main window displays "Advance for Office Tearsheets" information, including a category dropdown set to "All" and a table of sample reports under the heading "COMPANY FUNDAMENTALS".

Format / Category	Description
<input type="checkbox"/> Balance Sheet	Displays key balance sheet items from Worldscope using a request table. Replicates the DSWindows 190B report.
<input type="checkbox"/> Cash Flow	Displays the key cash items from Worldscope using a request table. Replicates the DSWindows 190C report.
<input type="checkbox"/> Profile, Product & Geographical Analysis	Displays key profile, product & geographical items from Worldscope using a request table. Replicates the DSWindows 190E and F report. Requires a full Worldscope subscription.
<input type="checkbox"/> Profit & Loss	Displays key income statement items from Worldscope using a request table. Replicates the DSWindows 190A report.
<input type="checkbox"/> Fundamentals Ratios	Displays key ratio items from Worldscope using a request table. Replicates the DSWindows 190D report.
<input type="checkbox"/> Worldscope Interims	Displays Worldscope interim and year end data for a chosen company over a 5 year period, broken down into Income Statement, Balance Sheet and Cashflow/Key Ratios.
<input type="checkbox"/> User Defined Worldscope Report	Allows user defined Worldscope items to be entered and displayed. Replicated the DSWindows 190Y User created format functionality.

At the bottom of the window are buttons for "Download & Open", "Download", and "Close".

## **SUPPORT**

Thomson Reuters provides fully resourced Help desks for queries on Datastream, data, and communications problems. For more information see Contact Us links in the Desktop and add-ins.

## **ACCOUNT MANAGEMENT**

In addition to the service provided by the Help desk, full advice and support is available from your Account Manager.

## **DATASTREAM RESEARCH EXTRANET SUPPORT SITE**

The Extranet contains information on new content and functionality, series code updates and an increasing range of spreadsheets, documents, and presentations showing how Datastream charts and data can be used in Excel, Word, and PowerPoint.

## **TRAINING**

Thomson Reuters provides a range of hands on training options designed to give you the knowledge, practice, and confidence to make full use of Datastream. Contact your Account Manager for complete and up to date information.

## **CONTACT DETAILS**

For current numbers and addresses, see the Extranet:  
<http://product.datastream.com/extranet>





# Notes

*DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED GUIDE DATASTREAM GETTING STARTED*