

MORE WITH BLOOMBERG

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October 16, 2020

The Bloomberg logo is displayed in white text on a black rectangular background. The word "Bloomberg" is written in a bold, sans-serif font, with the "B" being significantly larger than the other letters.

Bloomberg

Topics

- Equity and Bond screening
- Portfolio creation and analysis
- Creating charts
- Downloading data into Excel
- DEMO

Equity and Bond screening

- EQS <GO> equity screening
- SRCH <GO> fixed income screening
- WATC <GO> watchlist analytics
- Allows filtering by sector, variables, etc. to screen for desired results

Portfolio and company analysis

- PORT <GO> analyze portfolio performance and exposure
- PRTU <GO> create and share custom portfolios and benchmarks
- ANR <GO> analyst recommendations
- SPLC <GO> supply chain analysis

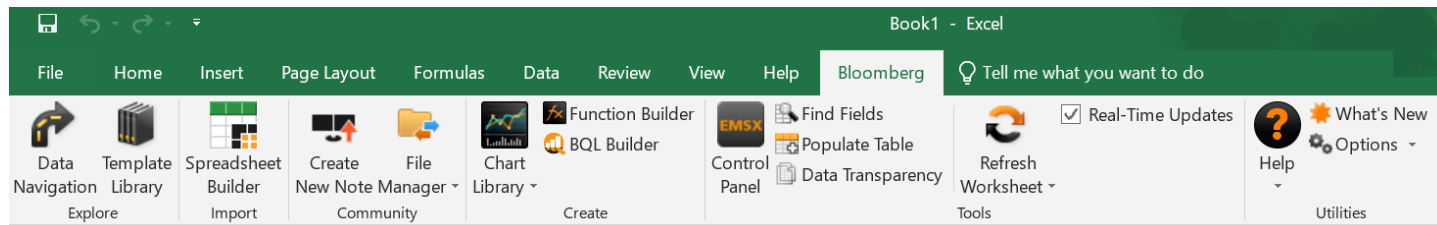
Charts and graphs

- CHAR <GO> charts homepage
- G <GO> personal chart library where you can manage and share your graphs
- XOM US EQUITY **GP** <GO> security specific line chart



Excel plugin

- Allows download of data from Bloomberg into Excel
- In-person: activate plugin (PC only) using instructions at <https://commons.trincoll.edu/frtc/excelplugin/>
- Remote: option given to launch Bloomberg with Excel plugin
- Use spreadsheet builder to download data
 - Filter by security/field/time
 - Spreadsheet can be saved for later analysis
- Numerous Excel templates available



Documentation and Help Resources

- While logged in –
 - Use autocomplete in search bar
 - Press Help key once to access function's help page
 - HELP <GO> online user guide
- Trinity resources – <https://commons.trincoll.edu/frtc>
- Recommended: work through [Getting Started on the Bloomberg Terminal guide](#)
- Contact –
 - Cheryl Cape, Instructional Technologist at cheryl.cape@trincoll.edu
 - Yoli Bergstrom-Lynch, Research Librarian at yolanda.bergstromlynch@trincoll.edu
 - Student Technology Assistants at sta-help@trincoll.edu