



# Insight at Every Data Point

Save 15 Minutes  
Daily within  
Your Corporate  
Development &  
Strategy Workflow

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**S&P Global**  
Market Intelligence

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In today's deal environment, M&A and strategic professionals are short on time, facing demanding timelines and increasingly managing the challenges of data overload.

There is an acute need to be able to do more with one's data.

To seize opportunities quickly, accelerated time to insight on valuations, comparables, deal structuring, benchmarking and timely monitoring is critical in helping deals reach completion.

We've identified the top demands on your Corporate Development workflow and addressed them with newly enhanced features found on the S&P Capital IQ Pro platform. Our premier data solution puts a world of information at your fingertips and streamlines how you distill critical insights.



**We help over 300,000  
professionals do their job better  
with our platform solutions.**

Whether you're looking to generate alpha, manage supply chain risk or meet regulatory requirements, our ecosystem of differentiated data, powerful AI solutions and dynamic visual analytics helps solve your everyday business challenges and empowers you to discover actionable insights faster.

# Save time throughout your day

These are the top time challenges and manual processes that Corporate Development and Strategy professionals are dealing with.

## Market Research and Analysis

How can I efficiently stay informed of industry trends, competitor activities, and emerging sectors to identify areas with growth potential?

### **Timesavers:**

#### **Set up automated alerts**

- Get Morning, Noon and Evening IQ newsletters specific to your region highlighting market-driven news, critical data, and events.
- Set custom alerts for a specific list of companies with tagged key developments to cut through the noise of general news alerts, focusing on topics like announced or potential transactions, customer or product announcements, red flags or distress indicators and earnings calls.

#### **Lean on transcript summarizations**

- Quickly understand the topics in a company's earnings call with Capital IQ Pro's generative AI-driven transcript summarization. The earnings call summary is organized by Topics and Sentiment with hyperlinks to referenced sections in the transcript for transparency.



## **Sync your calendar to corporate events**

– Avoid manual monitoring and never miss a competitor's earnings call or event by automatically syncing corporate and industry events with our newest Events Calendar feature for seamless updates.

## **Finding Opportunities and Deal Ideation**

How can I quickly scan markets for potential acquisition targets, strategic partnerships or new business opportunities when my deal criteria is complex or very specific?

### **Timesavers:**

#### **Get a comprehensive Market Maps view of trends**

- Leverage our niche industry classifications, which we call Topics Tags, to efficiently gain insights into a company's operations without combing through content manually.
- Utilize our Market Map page feature to pull quality assets in emerging industries, view financial information using Topics Tags, to understand purchase prices and market trends by theme.

#### **Distill insights with Screener Tool**

- In an instant, filter down a list of targets from our universe of company data using both qualitative and quantitative criteria, including subsector, size, industry keywords and location.

- Easily save results to a list, export to Excel for valuation modeling, share with colleagues or create alerts from the screen to be notified when results change.

## Strategic Planning

How can I build a time-sensitive, well-researched plan to align with strategic initiatives when I need detailed financial and market data for decision-making, product launches or divesting assets?

### **Timesavers:**

#### **Access a one-stop source for equity research**

- Gain access to a comprehensive collection of analysis from 1,800+ contributors, including top global and regional firms like Barclays, Citi, Deutsche Bank, JP Morgan, and UBS, without having multiple subscriptions and log-ins.
- Expand your research toolkit to understand how the street views markets and sectors with peer analysis, idea generation, financial analysis, valuations and risk assessments.
- Use Capital IQ Pro's AI-powered search features with keyword highlighting to instantly locate analyst insights and export tables directly to Microsoft Excel with one click for fully-formatted data.

## **Gain a perspective on opaque private markets**

- Build a multiyear strategy without having to hunt for hard-to-find, incomplete private company data. Expand your knowledge of new and existing markets with new metrics to assess company size and growth trajectory.
- Utilize our expanded private company coverage, now with more than 54M firms, featuring 13M+ with financials. Gain insights for products, services, and end markets for private companies.
- Tap into in-depth intelligence on private equity and venture capital relationships and corporate structures, and reference our transparent calculations for valuations linked back to state filing sources.

## **Financial Analysis and Risk Assessment**

How can I conduct a thorough but efficient due diligence with my team to evaluate the financial health, operational efficiency, and strategic fit for a potential target?

### **Timesavers:**

#### **Easily generate peer comps**

- Save time when conducting peer benchmarking with the Peer Comps tool, which allows you to quickly pull relevant comparable companies for a target. Have the flexibility in your analysis to customize a peer set and the metrics being used.



## **Get an enhanced document research experience**

– Read critical documents, such as transcripts, more efficiently with Document Viewer. Immediately see a high-level summary before digging into text-heavy documents. Skim easily by seeing all the companies mentioned and linked, providing the reader with a sense of important relationships, partnerships, areas of growth, and areas of risk.

## **Valuation**

How can I streamline my valuation workflow to accurately assess the value of a target company or asset and gain an edge during the negotiation of a purchase price, deal structure or other key transaction terms?

### **Timesavers:**

#### **Integrate data with Microsoft Office Plug-in**

- Use the Capital IQ Pro Office Plug-in to pull data in dynamically to Microsoft Excel, using formulas and table functions.
- Get a Template Library containing 550+ pre-built models that save you time from the burdensome task of building models from scratch or create your own on the platform with the help of our Formula Builder.

- Integrate enhancements like statistical functions, quick keys for trace precedents, dependents and IHS Markit bond and loan pricing, now available to help you conduct cost of capital calculations.

### **Expand your Microsoft Office toolkit**

- Accelerate the creation of pitch decks and drive efficiency when you present your analysis with Office Tools.
- Pull charts and model outputs into a linked PowerPoint or Word presentation and dynamically update content without manually reviewing and editing.
- Save time on formatting tasks using Presentation Tools to align, distribute, size and position content within PowerPoint slides.





## Five Reasons to Love S&P Capital IQ Pro

- 1. Robust transactions data and private company coverage** that allow you to stay ahead with data on 1.2M+ M&As, 340K equity offerings, 330K debt offerings, 830K rounds of funding, 96K buybacks and 54M+ private firms worldwide.
- 2. AI-enhanced search, Chat IQ and Document Viewer** capabilities across our platform allowing you to quickly discover proprietary research, news and more.
- 3. Content personalization tools** like Dashboard, Alerts, News, Events Calendar, and Maps.
- 4. Tech-forward productivity tools** like our powerful Screener tool for targeted list generation and Microsoft Office Plug-in for modeling and template creation.
- 5. Machine Learning models** are applied to a vast library of documents, such as earnings call transcripts for summarization, identifying key phrases, and visualizing trending topics.

**Try S&P Capital IQ Pro >**

# Takeaways

- **Market analysis doesn't have to be a time-consuming trip down a rabbit-hole.** Get to the essential faster to monitor new industry trends, competitors and new deal opportunities with automation and summarization tools.
- **Professionals need powerful data solutions to efficiently screen and identify their next target** based on super-specific deal criteria so they can filter out the winners.
- **Strategic planning needs timely and dynamic data** in order to advance corporate initiatives, inform stakeholders and ensure decision making with confidence.
- **Identifying the right comp set is critical** to performing thorough but efficient due diligence. Customize your platform view so you can get laser-focused on the right metrics.
- **Rethink how you conduct valuations and pitch.** Use tech-forward analytics and dynamic data instead of manual methods to get deals across the finish line.

**Try S&P Capital IQ Pro >**

## About S&P Global Market Intelligence

We are the foremost provider of information services and solutions to global markets.

**Data & Analytics:** Fundamentals. Sector-specific KPIs. M&A. Credit risk. Supply chain. Sustainability. Our breadth and depth of data help you uncover new insights to make decisions with conviction.

**Software & Platforms:** Proprietary platforms. Leading-edge technology. Kensho AI innovation hub. With a keen eye on changing markets, we help you apply the power of innovation to financial decision-making.

**Expert Insights:** Analysts. Data scientists. Industry professionals. We know what you need to succeed in complex markets. We stand alongside you to solve business challenges.

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