Unshakeable Confidence for Your Investment Strategies

S&P Global
Market Intelligence
Develop strategies for strong alpha potential and unlock hidden value through a robust suite of data and analytics for your fundamental, quantitative, or quantamental approach.

Turn data into actionable intelligence with S&P Capital IQ, our powerful analytics platform. Gain integrated access to a variety of premium data, including company financials, transaction data, and corporate yield curves; plus powerful data mining and analysis tools to run counterparty credit risk analytics, private equity targeting, and more.

Go deeper for certain industries with our Market Intelligence platform, which combines fundamental data with sector-specific metrics and analytics that are relevant to the industries you cover, plus key asset data, mapping tools, regulatory insight, and more.

Build and test strategies relative to factor performance and uncover unique sources of risk and return for a clear understanding of your investment results.

Assess risk, optimize your research and portfolio construction process, and access over 550 alpha factor signals so that you can determine your next position faster.

Gain unique insights and understanding into your sources of risk and return with detailed analytics and style-based portfolio attribution.

Communicate your portfolio performance and strategy with highly customized reports, produced on a pre-set schedule or on-the-fly.

See how our integrated web-based and feed solutions for investment managers can power your workflow and help you make decisions with conviction.
Fundamental Solutions

Perform Comprehensive Company and Industry Research

- **Point-in-Time Financials:** Analyze company performance with financials captured from press release to latest-fully-reported, adjusted for nonrecurring charges, down to the source documents. See metrics at any point-in-time for multiples and valuation analysis in five period types: annual, semi-annual, quarterly, year-to-date, and last twelve months.

- **Estimates:** Receive complete one-click access to consensus estimates and analyst-level detail. Measures include EPS, Revenue, Net Income, EBITDA, and EBIT plus many more.

- **Transactions:** Dive into recent M&A activity, private placements, IPO, and equity/debt offerings with meaningful visualizations and detailed deal summaries.

- **Investment Research:** Download research reports and analyst earnings models from a global network of brokers and independent research providers.

- **Events and Transcripts:** Stay informed with streaming, preliminary, and final transcripts alongside investor presentations then sync corporate events directly to your Outlook.
Monitor Companies and Markets

- **News:** Get sector-specific news for deep insights on companies across the globe.

- **Key Developments:** Access corporate guidance, earnings announcements, executive changes, transaction announcements, and other market-moving material.

- **Alerts:** Receive email alerts in real-time to stay on top of company actions and news, changes in screening results, and new investment research reports.

- **Macroeconomic Data:** Access global coverage and data on inflation, employment, GDP, balance of payments, trade, retail, industrial, and other major economic indicators.

- **Mobile App:** Stay on top of the markets from anywhere with news, financials, filings, transcripts, and alerts.
Generate Actionable Ideas and Access Thousands of Contacts

- **Screening:** Choose from thousands of quantitative and qualitative criteria to screen equities, activist campaigns, fixed income securities, buybacks, insider holdings, M&A, and other transaction types to identify relevant investments.

- **Charting:** Gain more perspective using technical indicators and trend analysis to customize and plot market and macroeconomic data, financials, estimates, multiples, and credit indicators.

- **Money Market Directories (MMD):** Market to institutional investors using a comprehensive web-based platform that lets you build effective relationships, identify new sales opportunities and sources of capital, perform focused prospecting, and develop targeted mailing campaigns.

Enhance Models and Customize Presentations

- **Excel Models:** Access over 100 pre-built models and leverage the S&P Global Market Intelligence Office Tools to quickly build financial models tailored to financials, valuation, fixed income detail, estimates, ownership and more.

- **Dynamic Presentations:** Format Excel models efficiently with shortcut commands that integrate Excel data to PowerPoint and Word.

- **Report Builder:** Produce detailed, customizable reports for a specific company or a list of companies with detail from professionals to credit indicators and everything in between.
Dive Deeper than Basic Financials with Sector-specific Intelligence

- Leverage the Market Intelligence platform, an essential tool for sector-specific data with powerful visual displays, in-depth reports, and whip-smart analytics that deliver at-a-glance industry insights.
- Access a wide range of sector-focused data, including financial, market, peer, and demographic information. Exclusive sector news provides even more insight, giving you a complete picture of your industry.
- Integrate delivery with Xpressfeed™ and gain coverage of the Financial Institutions (FIG) and Real Estate sectors with over 1,400 detailed industry data points on over 17,500 current and historical companies globally. Historical annual and interim data is available as far back as 1990 for certain data sets and geographies.

Streamline Portfolio Reporting and Monitoring with Portfolio Analytics

With our new portfolio analytics and reporting tools, you can apply advanced attributions with hundreds of metrics and enhanced visualizations, to customizable, client-ready reports that let you gauge and communicate the performance of your investments based on your investment style.

- Design custom reports that better showcase absolute and benchmark-relative performance.
- Run reports on-the-fly or schedule reports to be delivered via email or ftp with your corporate branding.
- Improve client conversations with deep insights into investment style exposures and sources of risk diversification.
- Study and uncover investing signals with Alpha Factor Library, with over 550 valuation, sentiment, earnings quality, and capital efficiency factors.
Quantitative Solutions

Xpressfeed™

Access deep data from a single source with our powerful data feed management solution.

- Expedite integration with your proprietary data, API, third-party vendors, and the S&P Capital IQ platform while cross referencing services from a single source.
- Unlock hidden value in complex business sectors with sector-specific news and data for financial institutions, insurance, real estate, technology, energy, and media and communications.
- Tap into over 120 data sets including point-in-time financials, estimates and information on people intelligence; ownership, corporate relationships, key developments, and other non-financial details.
Alpha Factor Library

Uncover new sources of alpha through a unique signal library built using our global point-in-time databases.

- Available as a data feed or accessible through the S&P Capital IQ platform and Portfolio Analytics, the Alpha Factor Library enables you to access over 550 alpha signals, available across 40,000 securities in 94 countries. Examine the impact of economic cycles with over 40 market, economic, political, and calendar-based periods.

- Use the Screening tool to query across the entire factor library and build customized reports to uncover potential investment opportunities.

- Leverage expertise from S&P Global Market Intelligence’s Quantamental Research Group and access an expansive research report library.
Compustat®

A comprehensive database with standardized, historical data and flexible delivery options to power your quantitative analysis and research.

- Enhance your analysis with over 60 years of rigorously sourced fundamental and market data standardized for in-depth quantitative analysis.
- Access extensive annual and interim history back to 1979, with extended annual history back to the 1950s.

ClariFI®

A comprehensive alpha research and portfolio management platform that offers powerful analytics and global market data solutions.

- Easily access our data libraries through a secure, hosted, or locally installed environment.
- Overlay quantitative insight onto fundamental ideas using industry-leading factor analysis, strategy simulation, portfolio optimization, and portfolio attribution features.
- Increase operational efficiency and accelerate ideation with integration between ClariFI’s full set of functionality, consisting of screening, backtesting, event study, portfolio construction, optimization, and portfolio attribution.
Fixed Income Solutions / Credit Analytics

Analyze and monitor credit risk with this set of risk analysis capabilities on the S&P Capital IQ platform.

- **In-depth Credit Research**: Access index and constituent security level data alongside credit ratings from S&P Global Ratings, Fitch, and Moody's.
- **RatingsDirect®**: Access credit facilities and in-depth ratings and research by sector and collateral type for your coverage universe.
- **Credit Analytics**: Combine global fundamental data and quantitative measures of credit risk into a single application.
- **CreditStats Direct**: Analyze adjusted financial statement data that S&P Global Ratings Analysts use in their credit opinions, including credit-adjusted financials and ratios.
- **Fixed Income Summary**: Locate detailed components of debt capital structure for public companies, as well as private companies with public debt regardless of issuer size.
- **Key Documents**: Source covenants and debt related, corporate, and M&A agreements in one convenient location.
Benchmark and Monitor Market Pricing

- **Leveraged Commentary & Data (LCD):** Gain insight into credit decisions with relevant benchmarks and receive the latest news on new issue and secondary market information in the U.S. and European leveraged loan and high-yield bond markets.
- **Yield Curves:** Perform discounted cash flow valuations and understand current market pricing for debt funding with Corporate Yield Curves.

Monitor Credit Health

- **Credit Risk Indicators:** Identify weakening credits and strengthen surveillance with quantitative short, medium, and long-term indicators of credit risk for both rated and unrated entities.
- **Credit Analytics and Credit Surveillance Models:** Analyze a company's probability of default, estimate loss/recovery stats and set alerts to monitor potential of default.
- **Credit Health Panel:** Evaluate operational, solvency, and liquidity ratios for a company and its peers.
About S&P Global Market Intelligence

S&P Global Market Intelligence integrates financial and industry data, research, and news into tools that help track performance, generate alpha, identify investment ideas, understand competitive and industry dynamics, perform valuation, and assess risk.

CONTACT US

The Americas
+1-877-863-1306

Europe, Middle East & Africa
+44-20-7176-1234

Asia-Pacific
+852-2533-3565

* All data as of June 2017.

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