Uncover new insights with best in class data. Empower your research.

S&P Global Market Intelligence data through Wharton Research Data Services (WRDS)

S&P Global
Market Intelligence

Wharton | wrds
UNIVERSITY of PENNSYLVANIA | The Global Standard for Business Research

Achieve excellence in research with unrivaled data.

Today, millions of data points are created every second, with 80% of those data points classified as unstructured* Business schools, from faculty to students must harness the power of data for research, curricula and learning the business of financial markets. It's no longer acceptable to use basic financial data to support these needs.

The new decade has solidified the need for comprehensive data in every academic concentration. You need access to best in class data to elevate your business program at the institutional level. Attract new faculty, new students, and establish a truly competitive edge to enhance your curriculum and prepare students for today's business challenges. Do more with resources that power the global financial markets.

The **S&P Global Market Intelligence** partnership with **Wharton Research Data Services (WRDS)** provides academic institutions with powerful, respected data through a time-tested business intelligence tool designed for better computing and timely research.

A catalog of data at your fingertips.

Compustat®

Standardized global company fundamental and market data for active and inactive publicly traded companies that financial analysts have relied on for over 50 years. Access historical and point-in-time financial statements, ratios and multiples. View annual and quarterly data integrated with daily and monthly market data across active and inactive publicly-traded companies.

Fundamental and Market Data

– **North American** fundamental and market information on over 50,000+ active and inactive publicly held companies including annual and quarterly Income Statement, Balance Sheet and Statement of Cash Flows. Annual data from 1950, quarterly from 1962, and daily pricing data from 1984

– **Global** fundamental and market information on over 65,000 active and inactive publicly held companies. Annual data from 1988, quarterly from 2003, daily from 1986, and monthly available for up to 20 years prior

– **Segment history** data as far back as 1976

Snapshot

– Point in time data as early as 1987

– Preliminary and final data for annual, quarterly and year-to-date periods, with ability to identify what item values have changed and when

ExecuComp

– Annual data from 1970 and quarterly data from 1978

– Annual compensation data from 1992 on the top five executive officers, including 33,000+ executives and 220+ data items

SNL Financial Institutions Data

Bank fundamentals coverage providing detailed insights into performance analysis, asset quality, regulatory capital, and deposit/loan composition. Over 1,400 balance sheet, income statement and detailed industry data points on banks and financial services, with global histories as far back as 1990 for the U.S., Asia-Pacific, Europe and the Middle East.

– 10,000+ operating and 4,400+ historical banks and subsidiaries

– 1,200+ operating and 400+ historical insurance companies and subsidiaries and Bank regulatory agencies

– 13,000+ data items from regulatory filings for US, Mexican, and Columbian banks with history from 1990 — Granular regulatory financial data for 16,000+ operating and 29,000+ historical holding companies, subsidiary banks, and credit unions

– Regulatory filings data from 16,000+ operating and 45,000+ global historical holdings, companies, banks and credit unions

– Data items on core financials, reinsurance transactions, reserving, and investment details

Transcripts

Integrate rigorously sourced, reliable transcripts data with your own content and solutions. Leverage textual transcripts data in machine readable format with metadata tagging.

- Track latest **corporate actions** and trends from management discussions.

- Analyze **historical transcript data** on 10,600+ companies and growing with 100% coverage of the S&P 500, Russell 1000, and FTSE 100, dating back to 2004.

- **Easily combine transcripts** data from earnings, M&A, Guidance, Shareholder, Company Conference Presentations and Special calls with traditional datasets to formulate unique, proprietary analytics.

Capital Structure Data

Extensive debt capital structure for over 124,000 global public and private companies and equity capital structure data on over 105,000 active and inactive companies worldwide.

- Detailed components of a company's total debt and equity, plus the key characteristics of each component

- Debt capital structure for 96,000+ public and private companies worldwide, with data from 2002

- Equity capital structure for 104,000+ active and inactive public and private companies worldwide, with data from 1996

Key Developments Data

Monitors over 160 Key Development types including executive changes, M&A rumors, changes in earnings data, corporate guidance, delayed filings, SEC inquiries, and more.

- Structured summaries of material news and events including executive changes, M&A reports, changes in corporate guidance, delayed filings,SEC inquiries, and more

- Details include announced date, entered date, modified date, headline, situation summary, type, source, company role,and other identifiers

- 80+ key developments across 10 categories from 20,000+ news sources

- 8.5 million+ developments on 800,000+ companies worldwide,with history back to 1998

Professionals Data

Coverage of over 4.5 million global professionals including private and public company executives, board members, and investment professionals.

- Profiles for 4 million+ public and private professionals, including 2 million+ board members and 1 million+ executives globally

- 40+ compensation types including salary, bonus, directors' fees, and stock options

Transactions Data

Access extensive coverage of M&A, private equity, and capital market transactions with the ability to follow detailed deal life cycles including status, features, conditions, buyer and seller. Features include latest and historic deal valuations, size, deal conditions, termination fee details, target spread, target premium, multiples, enterprise value, and more.

– 2 million+ M&A, private placement, bankruptcy, IPO, and other capital markets transactions

– The global transaction database provides up to 10 years of history

– Each transaction has a synopsis, deal size, company participants, advisors coverage and associated filings

Credit Ratings

Streamlined delivery of S&P Global Ratings data with one of the industry's largest databases of current and historical credit ratings. Research, chart, and analyze credit performance and trends across industries, companies, and securities around the world.

– 9,000 currently rated and 18,000 previously rated global issuers including corporates, financial institutions, and insurance companies

– 600 currently rated and 330 previously rated sovereign, international public finance, and government entities

– 11,000 currently rated and 53,000 previously rated structured finance transactions, including asset-backed, commercial mortgage-backed and residential mortgage-backed securities, and collateralized debt obligations

– 1.7m US public finance rated securities historically

– Historical data for global issuers and structured finance data is available back to 1923; public finance data is available back to 1964 for maturities actively rated as of 2007.

Why Wharton Research Data Services?

– Gold-standard data and search tools attract and retain leading faculty and thought leaders

– Flexible delivery options allow you to access data remotely with one-click, while researchers with strong programming skills can access the client server using PCSAS Connect, C, Stata, Matlab, R, Python or SAS

– Data validation and integrity gives you timely updates and ready-to-use, standardized data sets immediately available for analysis

– Professional technical and research support from WRDS doctoral-level specialists provide dedicated service to our clients and researchers

– WRDS in the Classroom gives teachers and students access to real-world applications and an easy-to-use interface

– Powerful analytics and tools support your research and allow you to get more out of your data with less effort

About Wharton Research Data Services and the Wharton School

Wharton Research Data Services (WRDS) provides the leading business intelligence, data analytics, and financial research platform to global institutions — enabling comprehensive thought leadership, historical analysis, and insight into the latest innovations in academic research.

WRDS provides researchers with one location to access over 250 terabytes of data across multiple disciplines including Accounting, Banking, Economics, ESG, Finance, Healthcare, Insurance, Marketing, and Statistics. Flexible data delivery options include a powerful web query method that reduces research time, the WRDS Cloud for executing research and strategy development, and the WRDS client server using PCSAS, Matlab, and R. Our Analytics team, doctoral-level support and rigorous data review and validation give clients the confidence to tailor research within complex databases and create a wide range of reliable data models.

An award-winning data research platform for over 50,000 commercial, academic, and government users in 30+ countries, WRDS is the global gold standard in data management and research — all backed by the credibility and leadership of the Wharton School.

Founded in 1881 as the first collegiate business school, the Wharton School of the University of Pennsylvania is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. With a broad global community and one of the most published business school faculties, Wharton creates economic and social value around the world. The Wharton School has 5,000 undergraduate, MBA, executive MBA, and doctoral students; more than 9,000 participants in executive education programs annually and a powerful alumni network of 95,000 graduates.

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About S&P Global Market Intelligence

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. We integrate financial and industry data, research and news into tools that help track performance, generate alpha, identify investment ideas, perform valuations and assess credit risk. Investment professionals, government agencies, corporations and universities around the world use this essential intelligence to make business and financial decisions with conviction.

S&P Global Market Intelligence is a division of S&P Global (NYSE: SPGI), the world's foremost provider of credit ratings, benchmarks and analytics in the global capital and commodity markets, offering ESG solutions, deep data and insights on critical business factors. S&P Global has been providing essential intelligence that unlocks opportunity, fosters growth and accelerates progress for more than 160 years. For more information, visit www.spglobal.com/marketintelligence.

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