1. Find Companies/Securities

Securities are financial instruments—like stocks and bonds—that you can analyze with Bloomberg functions.

Find TESLA using the autocomplete suggestion:

Type the name of a company, Tesl
Note the autocomplete suggestion for securities. What are the top suggestions for this security?

To view Tesla type: TSLA <EQUITY> <GO> or select TSLA US Equity from the drop-down suggestions.
You should be at the main equity menu for Tesla.

Enter the function code for a company description DES <GO>.

Go to a function with one command line.

Thinking of command lines in terms of [security ticker] <[security type]> [function code] <GO>, how do you go to the company description page for Clorox (ticker CLX) with one command line?

Let’s find Ford Motor Co. using the <HELP> key.

Type in Ford, and hit the green <HELP> key.

Notice the many results and their tickers/identifiers.

Go to the list of companies. Find the ticker for the company you want.

Now you can enter the ticker <EQUITY> DES <GO> to go to Ford Motor Co.’s description page.

Note: If from the HELP results screen you used the mouse to select a security, then you will likely see the company description page. However, if you hit the <MENU> key you will go back to the Help screen rather than the security main menu. It is for this reason, we recommend typing the tickers and commands rather than using the mouse. It will also help you to memorize your favorite commands.
2. Exchange Codes and Security Screens

What goes into an identifier?

Did you notice the 2-letter market code that follows the ticker symbol? This is used to denote the exchange the security is traded on or the composite market (country) code.

Notice we didn’t enter this code earlier, but it didn’t matter?

Bloomberg will default to using the ticker for the country you specify in your profile preferences. In this case, the profile we are using defaults to US major exchanges and primary securities.

Let’s compare using the 2-digit exchange code.

Enter BAS <EQUITY> DES <GO>. You will see information on Basic Energy Services, primary exchange is in the United States.

Now enter BAS GY <EQUITY> DES <GO>. You will see information on BASF SE, primary exchange is XETRA.

Note: GY is the code for the exchange and GR is the composite code for BASF. See the full list of exchanges and composite codes on the library guide or EPRX <GO> in Bloomberg.

Find a company by screening for it.

Press the yellow market sector key <EQUITY> <GO>.

Notice the code to look-up a company, SECF. This is the security finder and will search for equities, debt, commodities, indices, and other securities.

Enter SECF <GO> and in the gold search box at the top, type Teleflex.

Use the yellow boxes and drop-down menu to filter results to only look at equities.

Notice you can also limit to types of equities, country of exchange, status, etc. Are there any clues that you see that might indicate one security is the default?
3. Finding Financials, Suppliers, and Competitors:

Finding Financials:

Go to: TSLA <EQUITY> <GO> and look for the code for financial analysis.

Enter FA <GO>

To view the Cash Flow statement, enter the number for the tab 4 C/F.

Note that you can view the financials as presented or standardized.

Company Debt Distribution:

Using the autocomplete, find the function code for Debt Distribution.

After you have the function code you can type it in as DDIS <GO>

Notice it didn’t need the security ticker or security type. This is because Bloomberg assumes you want to stay with this specific security, TSLA. You will only need to enter the ticker and security type if you want to look at a different security.

Let’s look at the Summary Statistics by clicking on tab #4. What is the percentage of the bond principle when it’s broken down by amount? (Hint: Look at the charts)

Supply Chain Analysis:

Now let’s look at the Supply Chain. Use the autocomplete to find the function code.

Can you identify Tesla’s top suppliers?

Use the <HELP> key to understand what you are looking at.
4. Industry News and Analysis Insights

News:

The news stories on Bloomberg are one of the most popular features.

Type N <GO> or hit the green <NEWS> key.

Select a story and download it (check the Actions button in the red menubar).

NLRT <GO> will help you set up your news alerts and MAG <GO> will take you to Bloomberg Markets magazine.

For company news, enter [company ticker] <EQUITY> CN <GO>. For example, TSLA <EQUITY> CN <GO>

Analyst Insights and Company News:

Bloomberg also contains analyst recommendations and company research.

Enter TSLA <EQUITY> <GO> and search for the section that has Earnings and Estimates. Notice the various ways to view estimates and reports.

Automobile Industry News:

Bloomberg has a robust industry research (Bloomberg Intelligence) section that includes news, market share, industry-specific metrics, and related information.

Enter BI <GO>. To search for the automobile industry either:

- Option 1: Drill down into the various sectors that you think would contain automobile manufacturing.

- Option 2: Enter your search terms into the Gold search box. Note that language can lead to different results. Compare the suggested results when you enter car versus vehicle versus automobile.

BI AUTM is the shortcut code for the auto industry overview. BI (Bloomberg Intelligence) and AUTM (automobile industry). Each industry has a similar shortcut such as BI SOLRG (solar industry), BI CATVN (cable and satellite industry), etc.
5. Economic Releases

Economic releases can have major effects on markets and companies. Many Bloomberg users set up alerts for upcoming economic releases. Go to the Economic Release calendar ECO <GO>.

Set the filters (Gold boxes) to the United States, All Releases, and change the date back 3 months.

Now scroll down and find Wards Domestic Vehicle Sales.

Either use the mouse or type in the ticker (SAARDTOT <INDEX><GO>) for this release to view more information on US vehicle sales.

Notice that many of these releases will be an <INDEX> market as they are not traded but used as an indicator.

6. Finding Commodity Prices

Let’s take a look at the cost of some of Tesla’s raw materials.

Let’s go to the security finder, SECF and search for Aluminum in the search box. Filter the results to just commodities and the country to the US.

Notice that some securities are listed as “generic” and others, when you view them are listed as an <INDEX>. Many times, if a security is listed as an <INDEX> or is called generic, it is an amalgam of securities designed to provide smooth historical time series information. These are also often benchmarks and are useful to know, for example the 10-year US treasury USGG10YR.

Select a security and view the graph price (GP) to see the price trends for aluminum.

Repeat the same process as above to find the prices for gasoline.
7. Mergers and Acquisition

To view the M&A landscape, search for specific deals or find M&A league tables, go to the Mergers & Acquisitions search page. Use autocomplete to find the function code.

Notice that there are some pre-made screens for deals in specific sectors and geographic regions. Use the **Advanced Search** function to create a custom search.

In the advanced search, set the date range **last 12 months, announced** deals.

Limit the sector to **Automobile manufacturers**. (You may need to use the mouse to expand the various sectors, search, and select the correct industry.)

Before your run the search, notice the save option. You can save custom searches to re-run again and again without having to fill out the search fields each time.

Run the search and explore the different tabs to see what deals have been announced.

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8. Grabbing and Saving

Sometimes it is helpful to have a screenshot of a Bloomberg chart or graph or to export data to Excel. There are a few options to do this:

Let’s view the beta screen for Tesla by entering: **TSLA <EQUITY> BETA <GO>**

To get an image of the entire screen, type **GRAB <GO>** and follow the prompts to email a screenshot to yourself.

Alternatively, you can save the entire screenshot as a file by using the **Take a Window Screenshot** option in the very top right corner. This is useful if you have multiple screens you want to save.

Go to the Intraday Price Chart (**GIP**), right click on the graph, and notice your options for downloading the image or data to the clipboard. Do both and paste into Excel.

What other potential options are there on this screen for downloading?

**Exporting Financial into Excel:**

Let’s go back to **FA financial analysis**, and click on the **97 Output** tab, select Excel, and next **Choose current template**.
9. Advanced Functions

For those who think they may be using Bloomberg for more advanced research, it is a good idea to become familiar with some of the additional features of the system including, but not limited to:

Bloomberg Launchpad (*BLP* <GO>) allows you to aggregate a variety of graphs, tables, and other information in one screen without having to navigate between panels. This is something that is in heavy use by those who use Bloomberg regularly. Go to *LPAD* <GO> to learn more about how to use the Launchpad.

and...

Bloomberg Excel API allows you to access Bloomberg data via Excel. You can download ready-made spreadsheets from *XLTP* <GO> or you can create your own. More information for developers is available at *BBXL* <GO> Please note that our contract stipulates data cannot be removed from the terminal.

and...

Bloomberg Market Concepts (*BMC* <GO>) is a self-directed 8-hour training covering market concepts such as equities, fixed income, and economics. It is ideal for those entering the financial world for the first time.

and...

*BPS* <GO> contains training materials and cheat sheets for Bloomberg.