

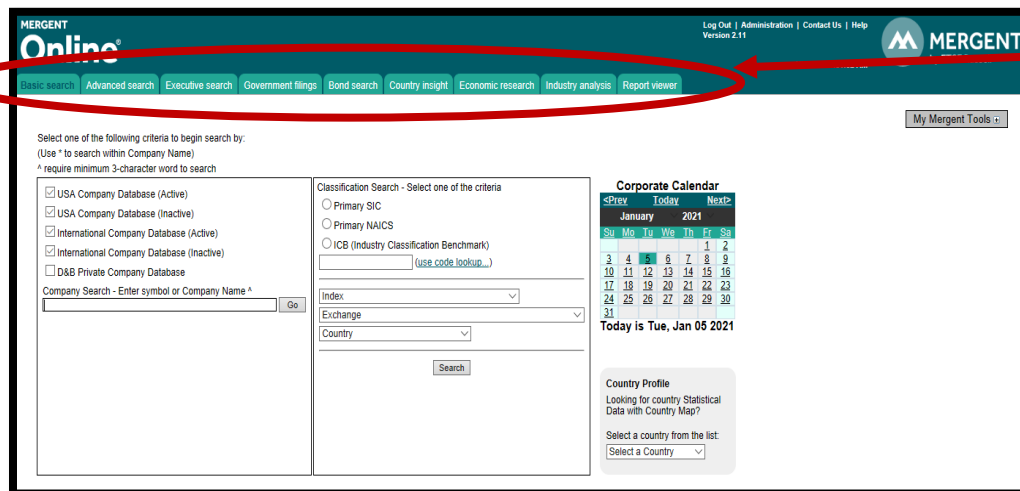


## MERGENT ONLINE

Mergent Online is a resource that provides Library customers extensive details for both public and private companies that shows what an organization truly looks like from every angle. Mergent Online is an invaluable resource for conducting, supporting, and validating financial and business research. Mergent Online can be found on the [Resources](#) page of the [Charlotte Mecklenburg Library](#) website.

### Mergent Online Homepage

There are nine search tabs on the homepage of Mergent Online for you to use in your research: Basic Search, Advanced Search, Executive Search, Government Filings, Bond Search, Country Insight, Economic Research, Industry Analysis, and Report Viewer.



### Search Tabs

- Basic Search
- Advanced Search
- Executive Search
- Government Filings
- Bond Search
- Country Insight
- Economic Research
- Industry Analysis
- Report Viewer

- **Basic Search** - Enables you to find a company using the company name or ticker symbol. Lists of companies can be searched by Primary SIC, Primary NAICS, or MIC codes. You can also include private companies in the basic search and restrict the search to US or International exchanges only.
- **Advanced Search** - Allows you to specify a wide range of textual and financial criteria to be searched for. These criteria are textual or numeric information within the data stored on companies. Multiple criteria can be set, combined with AND or OR, for even greater refinement in searches. You can choose from 8 different categories of information which to build criteria for your specific search: Corporate Information, Executives, Financials, Industry Codes, Pricing, Ratios, Textual Search, and Portfolio & Index.
- **Executive Search** - Allows you to specify a wide range of textual and financial criteria to be searched for. These criteria are textual or numeric information within the data stored on companies' executives. Multiple criteria can be set, combined with AND or OR, for even greater refinement in searches. Choose from 8 different categories of information from which to build

criteria for your specific search: Corporate Information, Executives, Financials, Industry Codes, Pricing, Rations, Textual Search, Portfolio & Index.

- **Government Filings Search** - Enables you to search the EDGAR government filings either by company information or by date or both.
- **Bond Viewer** - Has both a Basic Search and an Advanced Search. Search by identifiers (Issuer name, Issue name, Ticker, Mergent ID, CUSIP, ISIN or Industry Code. Date ranges searchable by the Offering Date Range, Maturity Date Range, and Next Call Date Range.
- **Country Insight Report Search** - Allows you to search the Mergent Online database for Mergent's Equity Portraits and Industry Reports.
- **Economic Research** - Leading search indicators from around the world.
- **Industry Analysis** - Allows you to interactively explore Industry characteristics data through charts and tables as well as access PDF reports based on ICB classifications. The data shown is generated using data from members of the Russell 1000 assigned to the given ICB industry groups. Check out the [Industry Analysis Quick Reference Guide](#) for more help.
- **Report Viewer** - Covers Company Reports, Annual Reports, Mergent Reports and Company Portraits. You can download the Summary Report, Fundamental Report, and the Expanded Fundamental Report of any asset.

## Basic Search

Basic Search allows you to find a company information using company name or ticker symbol. This guide will use the example of Apple Inc.

MERGENT  
Online®

Basic search | Advanced search | Executive search | Government filings | Bond search | Country insight | Economic research | Industry an

Select one of the following criteria to begin search by:  
(Use \* to search within Company Name)  
^ require minimum 3-character word to search

USA Company Database (Active)  
 USA Company Database (Inactive)  
 International Company Database (Active)  
 International Company Database (Inactive)  
 Sub Private Company Database

Classification Search - Select one of the criteria  
 Primary SIC  
 Primary NAICS  
 ICB (Industry Classification Benchmark)  
 (use code lookup...)

Company Search - Enter symbol or Company Name ^  
AAPL [x] Go  
AAPL NMS Apple Inc  
1 total company matches

Index [v]  
[v]  
[v]  
Search

Search results will reveal the Company Name, SIC Code, Exchange the company is on, Ticker symbol, Active or Inactive Status, County and Sector. Click on the Company Name to access the information.

## Company Information

Each company profile displays contact information, key figures and a row of green company information tabs. Each green tab has a secondary row of white information tabs beneath. Each page has options to download to Excel or open a printer friendly option to print. Many have separate printable PDF reports.

The screenshot shows the Apple Inc. (NMS: AAPL) company profile. At the top, there is contact information: Address: One Apple Park Way, Cupertino, CA 95014 United States | Phone: 408 996-1010 | Fax: 408 974-2483 | Company Website: www.apple.com. Below this, there are key figures: Market Cap: 2,227,406,080.020, Revenue: 274,515,000.000, Net Income: 57,411,000.000, Dividend: 0.8075, Dividend Yield: 0.6164, EPS Basic: 3.31, EPS Diluted: 3.28, PE Ratio: 39.9421. The page features a row of green tabs: Company details, Executives, Ownership, Company financials, Equity pricing, Annual reports, Filings, News, Competitors, Report builder, and Company reports. Below these are white sub-tabs: Synopsis, Highlights, History, Business, Property, Subsidiaries, Long term debt, Capital stock, Earnings estimates, and Business segments. Red arrows point from a red-bordered box on the right to the Contact Information, Key Figures, Green Company Info Tabs, and White Info Sub Tabs.

## Reports

There are multiple green tabs for reports. Choose from annual reports, Filings (with the SEC), company reports or use the report builder to custom build your own report.

This example uses the Annual reports tab.

The screenshot shows the 'Annual Reports' section. At the top, there are green tabs: Company details, Executives, Ownership, Company financials, Equity pricing, Annual reports, Filings, News, Competitors, Report builder, and Company reports. Below these are options: Download, Printer Friendly, and My Mergent Tools. A note states: 'Note: Company Reports selections are in PDF format. In order to view PDF selections, you must have Adobe Acrobat Reader'. Below the note is a table of reports:

Year	File Size	Language
<a href="#">2019-12-28 Interim</a>	400K	English
<a href="#">2019-09-28 Annual Report</a>	5378K	English
<a href="#">2019-06-28 Interim</a>	2981K	English
<a href="#">2019-03-30 Interim</a>	3003K	English
<a href="#">2018-12-29 Interim</a>	462K	English
<a href="#">2018-09-29 10K or Int'l Equivalent</a>	426K	English
<a href="#">2017-09-30 Corporate Social Responsibility</a>	9840K	English
<a href="#">2017-09-30 10K or Int'l Equivalent</a>	6766K	English

A red-bordered box on the right contains the text: 'Choose Your Report to open, download, or print in a PDF Reader.' Red arrows point from this box to the 'Annual reports' tab and the '2019-09-28 Annual Report' link.

Company reports are in PDF format. Adobe Acrobat Reader is the recommended PDF reader.

## Need More Help?

There is a link to [Help](#) at the top, right hand of each page within Mergent Online. The help screen will display explanations of the page, tabs, and helpful tips.

The screenshot shows the footer of the Mergent Online page. It includes the text: Log Out | Administration | Contact Us | Help. The 'Help' link is circled in red. Below this is the Mergent logo and the text: MERGENT by FTSE Russell. At the bottom, it shows the date and time: 1/5/2021 11:31:52 AM.