

STEP-BY-STEP:

# HOW TO RETRIEVE INDUSTRY FINANCIAL PERFORMANCE INFORMATION

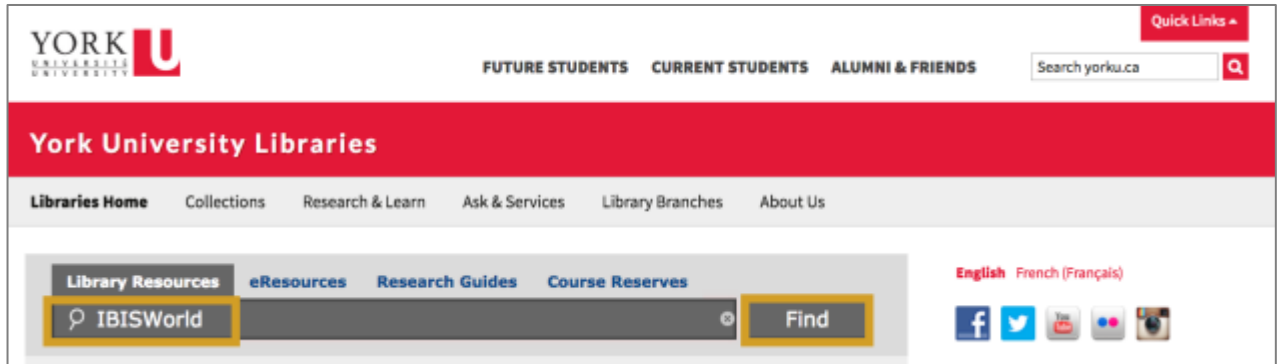
Use this document to retrieve financial performance information for specific companies using the following databases:

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# IBISWORLD

IBISWorld is a database that contains a wide variety of niche industry reports for Canada, the United States, and China, as well as global industry reports. Use the reports to retrieve industry financial information for your business assignments.

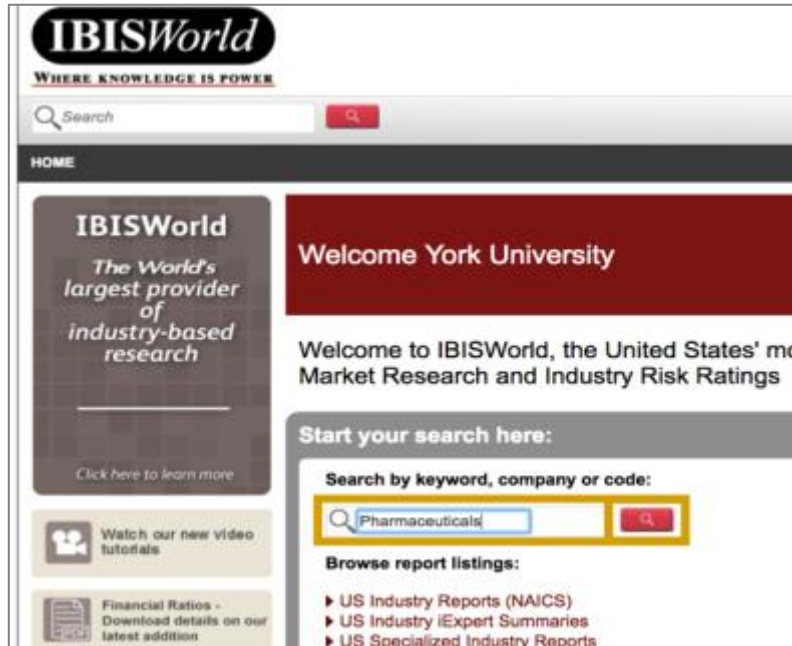
- 1 Start at the York University Libraries [homepage](#). Enter **IBISWorld** in the search bar, and click **Find**.



- 2 Click **Click to access this resource**.



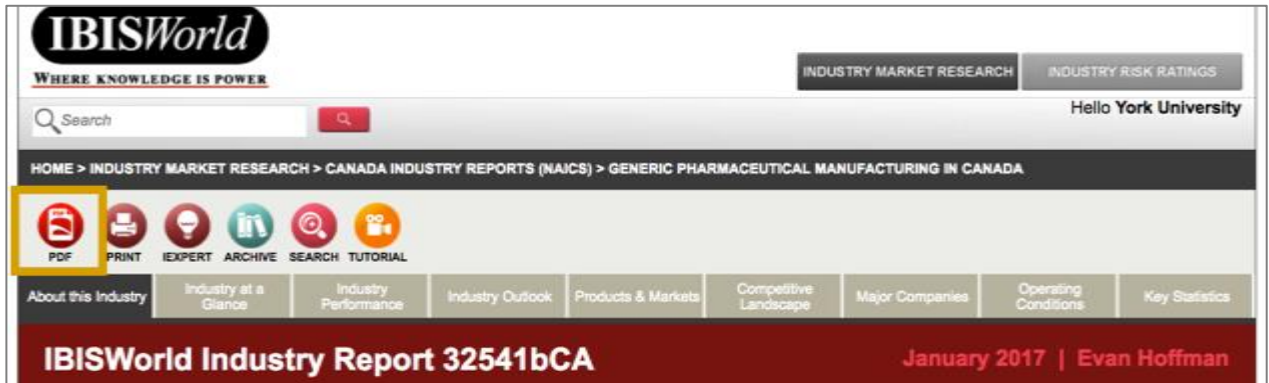
- 3 You can search using either NAICS codes or keyword. Type in the industry you are interested in, for example Pharmaceuticals, and click the search icon.



- 4 IBISWorld generates industry reports for the following regions: **US**, **Canada**, **China**, and **Global**. Click the report that best captures what you need or click **More Results** to see a complete list of relevant reports.



5 You can download the entire report by clicking the **PDF** icon.



6 Alternatively, you can click the **Industry Performance** section to go straight to the financial data.



7 For more detailed breakdowns, check out **Key Statistics** or any other sections from the rest of the report to gather more financial data.

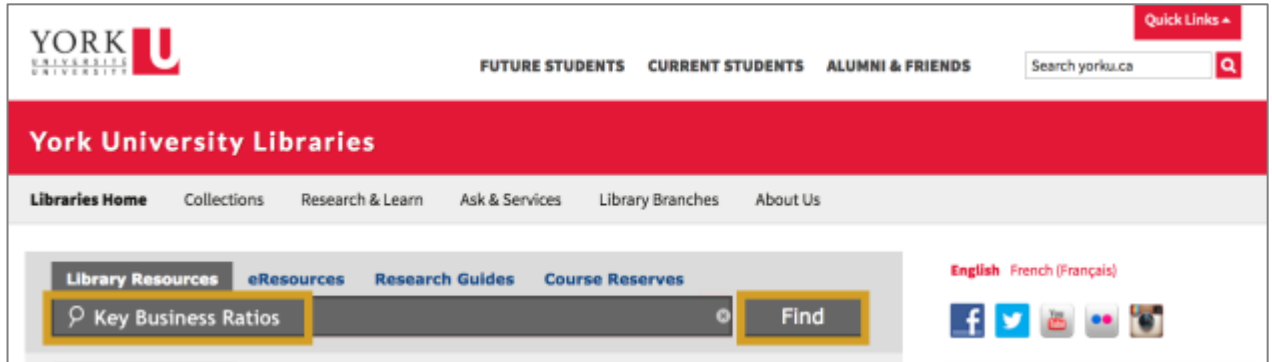
The screenshot shows the 'Key Statistics' section of the report, which is highlighted in a yellow box. Below the navigation tabs, a table of financial data is displayed. The table has columns for various metrics and three rows of data.

Establishments	Enterprises	Employment	Exports (\$m)	Imports (\$m)	Wages (\$m)	Domestic Demand (\$m)	Total health expenditure (\$b)
150	147	10,676	2,100.2	3,971.1	475.8	6,662.8	183.1
150	149	10,974	2,259.0	4,411.5	477.6	7,047.7	189.3
154	153	11,488	2,623.0	5,259.1	504.1	7,665.0	204.8

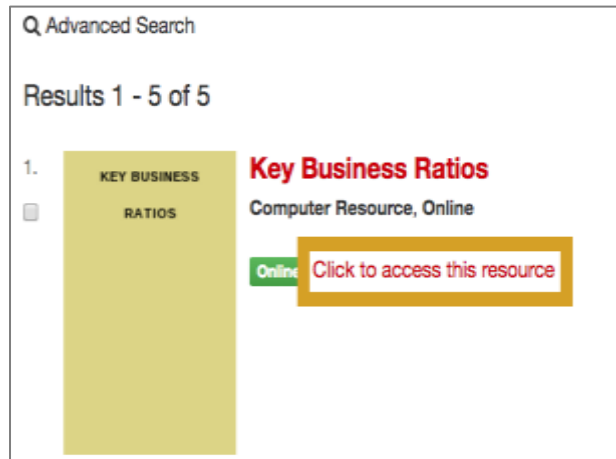
# KEY BUSINESS RATIOS

Use Key Business Ratios to retrieve industry benchmarks for public and private companies that include 14 key business ratios in 800 lines of business.

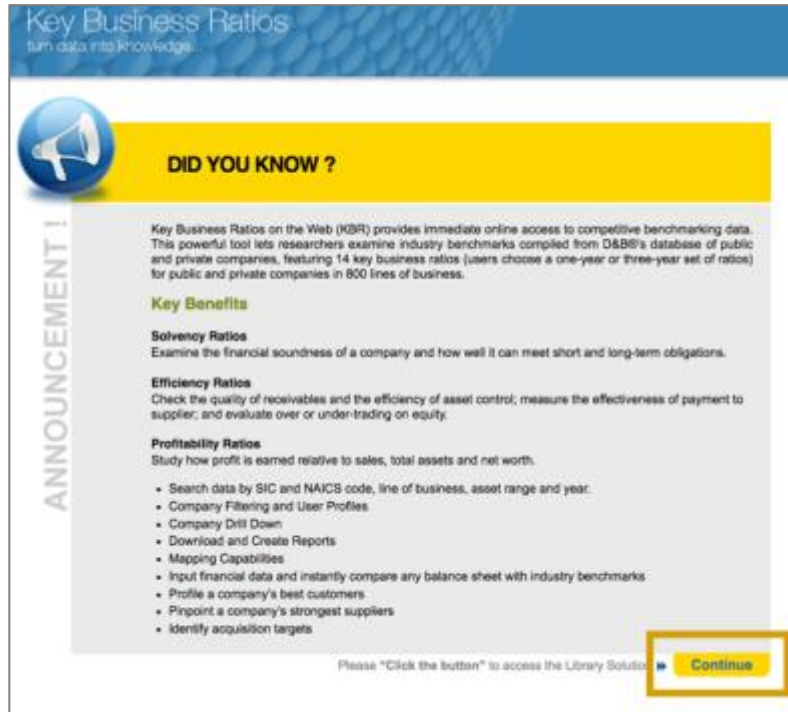
- 1 Start at the York University Libraries [homepage](#). Enter **Key Business Ratios** in the search bar, and click **Find**.



- 2 Click **Click to access this resource**.



3 Click **Continue**.



4 The page defaults to the **Reports > Industry** section. You can access industry ratios from this page.



- 5 You can search for a relevant industry (e.g. Pharmaceutical) using the **Line of Business** dropdown menu, or by SIC and/or NAICS codes. You can also use the Group By dropdown menu to search by Asset Ranges and Region. To find the right code for your industry, you can use the [SIC lookup site](#) or Statistics Canada's [NAICS Lookup site](#).



- 6 The page will refresh automatically and display industry ratios for your selected industry sector. The upper section of the report is organized by **Industry Quartiles** and **year**. The ratios are created using a sample of company statements from the industry. For example, the 2015 report for the pharmaceutical preparations industry uses 304 company statements to generate the ratios.

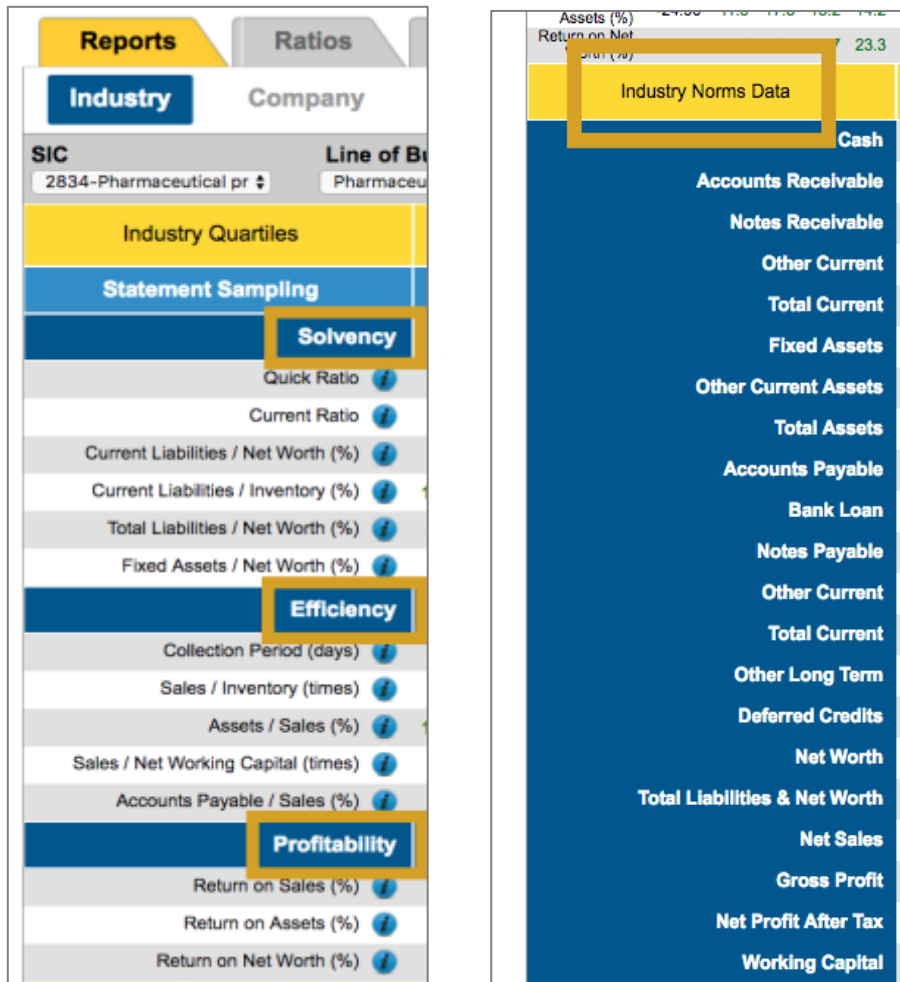
- **Tip:** Key Business Ratios does not provide a list of companies it samples.

A screenshot of the 'Key Business Ratios' report page, showing the 2015 data. The 'Industry Quartiles' and '2015' columns are highlighted with yellow boxes. The 'Statement Sampling' row indicates 'Samples: 304' for 2015. The table below shows ratios for 'Quick Ratio' and 'Current Ratio' across five years (2011-2015) and three quartiles (Upper, Median, Lower).

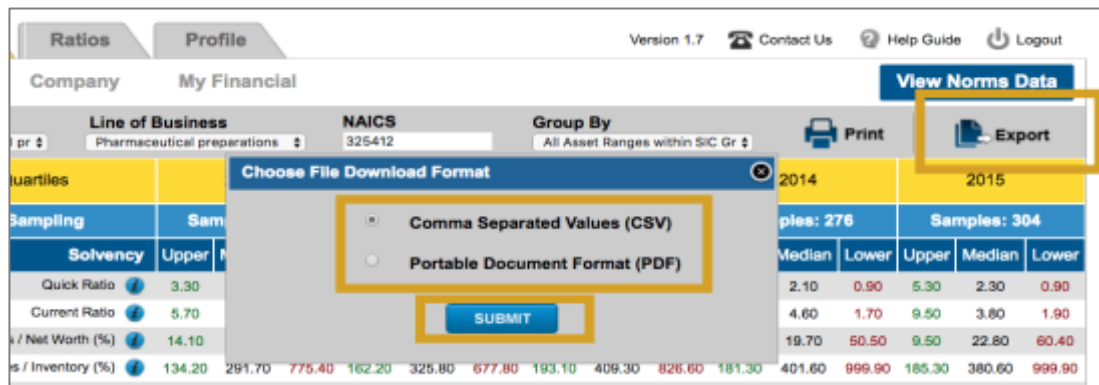
	2011			2012			2013			2014			2015		
Statement Sampling	Samples: 222			Samples: 220			Samples: 256			Samples: 276			Samples: 304		
	Upper	Median	Lower	Upper	Median	Lower	Upper	Median	Lower	Upper	Median	Lower	Upper	Median	Lower
Quick Ratio	3.30	1.40	0.70	3.80	1.80	0.70	4.30	1.90	0.80	6.30	2.10	0.90	5.30	2.30	0.90
Current Ratio	5.70	2.80	1.30	6.00	3.30	1.40	7.40	3.30	1.30	9.50	4.60	1.70	9.50	3.80	1.90



- 7 The report includes **Solvency**, **Efficiency**, and **Profitability** ratios in its upper section and **Industry Norms Data** at the end.



- 8 Export the report by clicking the **Export** icon. A pop-up window will appear. Select either CSV or PDF as your format and click **Submit**.

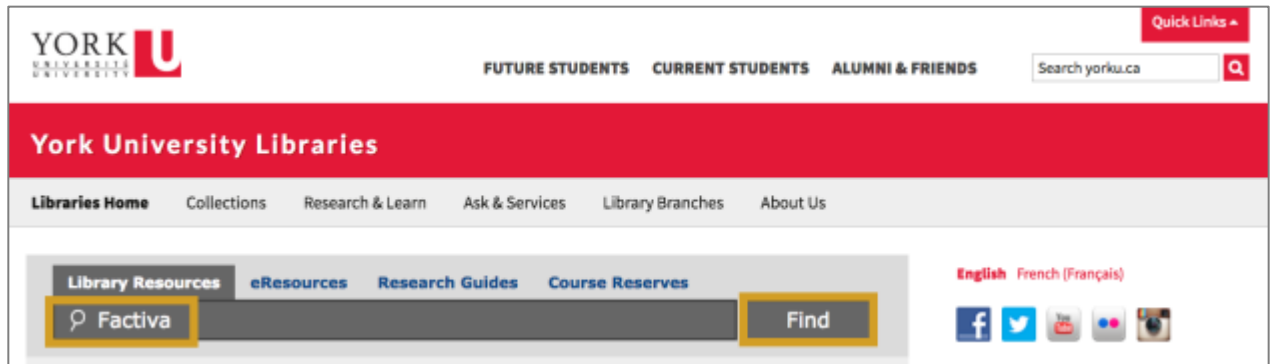




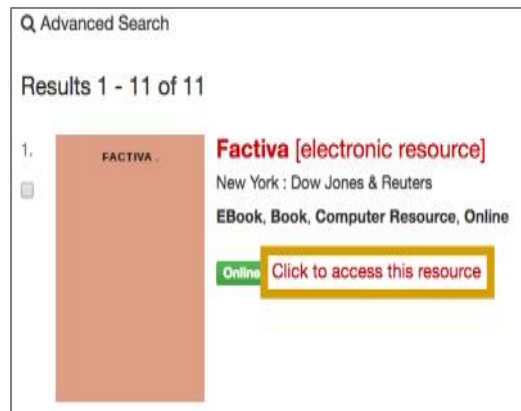
# FACTIVA

Use Factiva to search for financial performance news for your business assignments. Factiva is the leading source for news articles on companies, industries and financial markets. Factiva searches over 3,000 international, national, and regional news sources including content published by the Wall Street Journal, the New York Times, and the Globe and Mail.

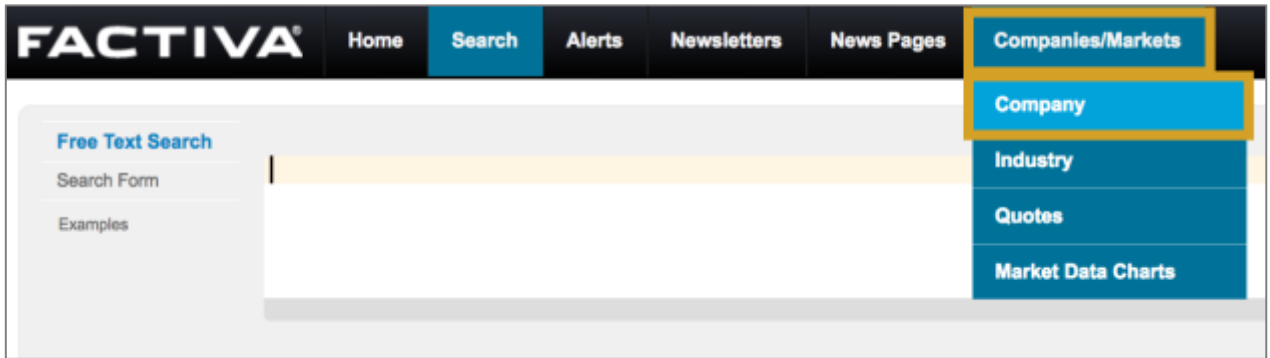
- 1 Start at the York University Libraries [homepage](#). Enter **Factiva** in the search bar, and click **Find**.



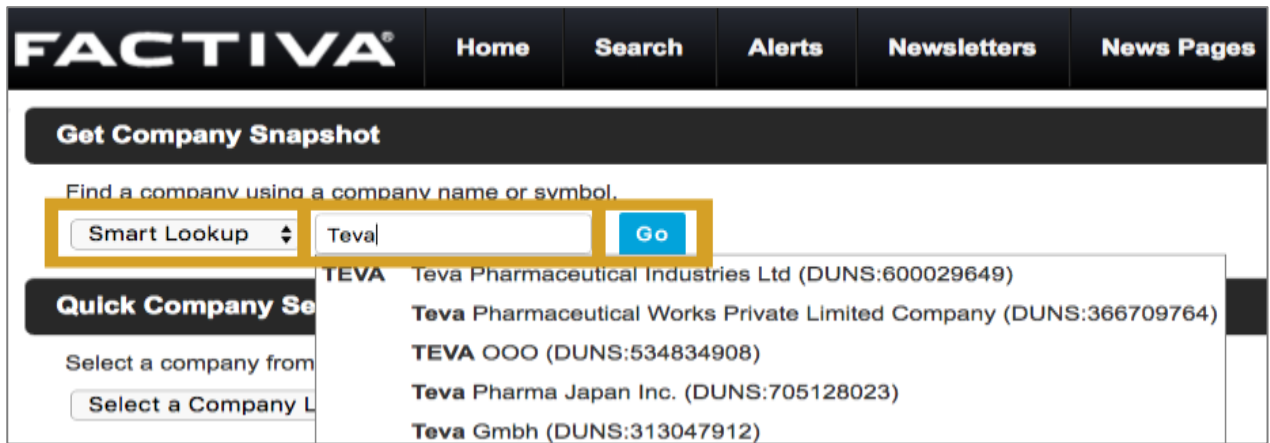
- 2 Click **Click to access this resource**.



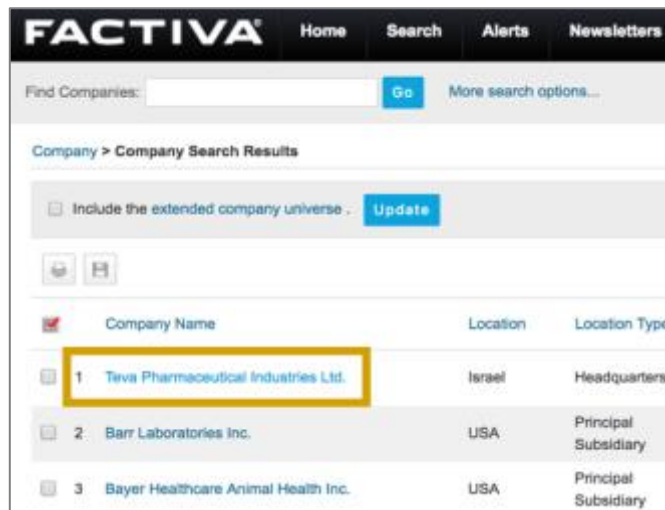
3 Hover over **Companies/Markets** and click **Companies**.



4 In the **Smart Lookup** section, search for reports on major companies in your industry sector (e.g. Pharmaceuticals) by company name or ticker symbol and click **Go**.



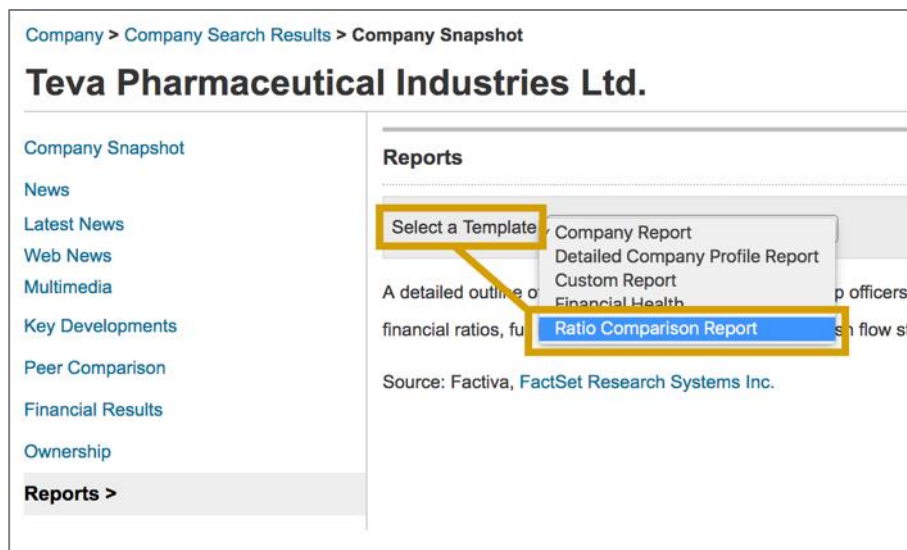
5 Click the name of the company you are interested in. This will take you to the company's report page.



6 On the company's report page, click **Reports** in the vertical navigation menu.



7 Use the **Select a Template** dropdown, menu to choose **Ratio Comparison Report**.



- 8 Select either **HTML** or **PDF** and click **View Report**.

**Reports**

Select a Template Ratio Comparison Report

Compares key financial ratios of this company against its industry, sector, and the S&P 500 Index aggregates.

Source: [FactSet Research Systems Inc.](#)

HTML 
  PDF 
 View Report

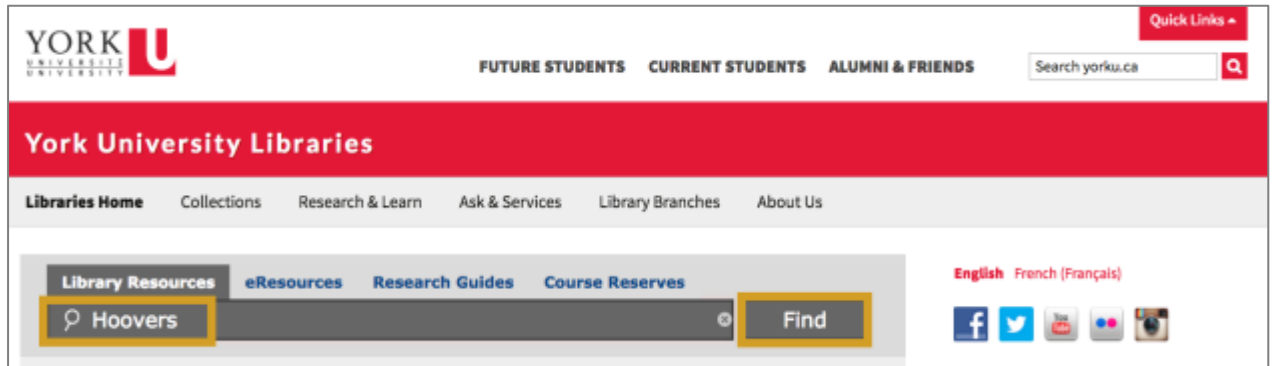
- 9 Scroll through the report to view a ratio comparison that includes the **Company** ratios, the **Industry** ratios and the higher industry **Sector** ratios including stock market ratios, **S&P 500**.

Ratio Comparison Report				
	Company	Industry (Pharmaceuticals: Generic)	Sector (Health Technology)	S&P 500
<b>Valuation Ratios</b>				
Beta, 5 Years	0.86	1.00	0.85	1.01
<b>Dividends</b>				
Dividend Yield	2.07	0.91	2.59	1.95
Dividend 5-Yr Growth rate	8.95%	4.19%	10.65%	15.30%
<b>Growth Rates</b>				
Revenue TTM vs. TTM 1 Yr Ago	1.30%	1.41%	99.44%	5.79%
Revenue, 5-Yr Growth	5.11%	16.61%	4.55%	5.75%

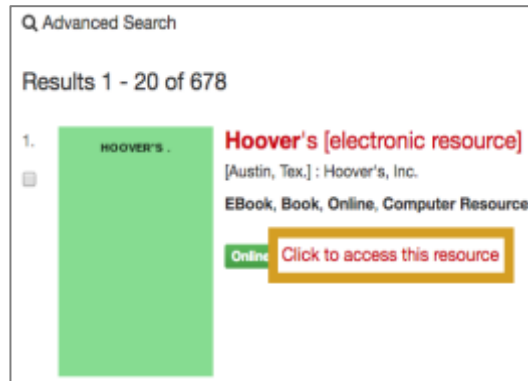
# HOOVERS

Use Hoovers to retrieve revenue and financial reports for your business assignments.

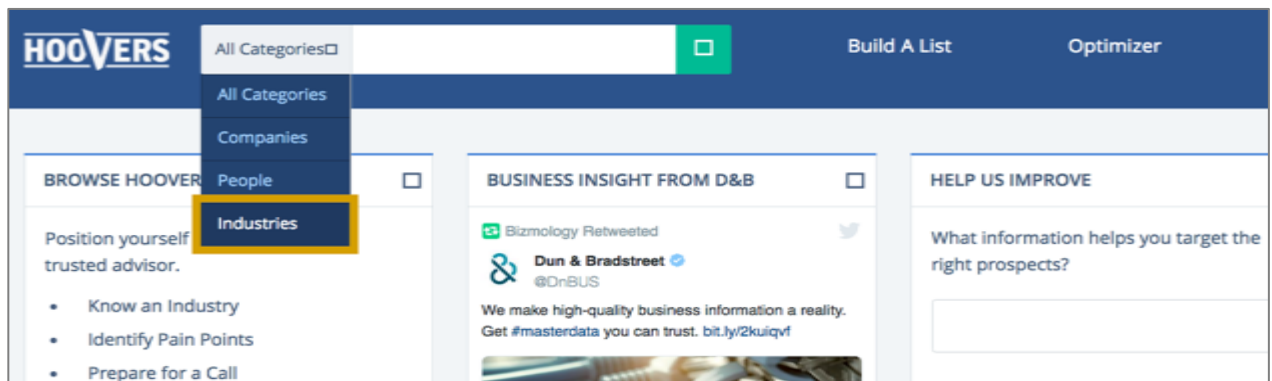
- 1 Start at the York University Libraries [homepage](#). Enter **Hoovers** in the search bar, and click **Find**.



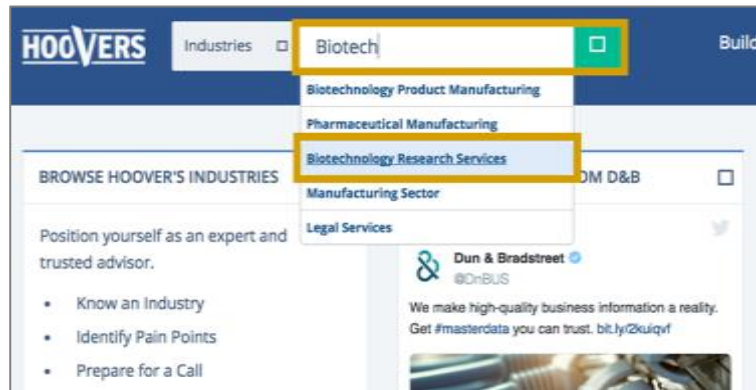
- 2 Click **Click to access this resource**.



- 3 Select **Industries** from the All Categories dropdown menu.



- 4 Type in a keyword for your industry (e.g. Biotech) in the search bar and select the industry services that best match what you need from the dropdown list. This will take you to a new page.



- 5 To see ratios for this industry, click **Financials**.



- 6 Scroll down to the **Company Benchmark Information** section to view industry performance financial information.

FINANCIALS				
<b>Company Benchmark Information</b>				
NAICS: 541711				
Data Period: 2015		Last Update September 2016		
Table Data Format				Mean
Company Size	All	Large	Medium	Small
Size by Revenue	Over \$50M	\$5M - \$50M	Under \$5M	
Company Count	4671	1	57	4613
Income Statement				
Net Sales	100%	100%	100%	100%
Gross Margin	79.0%	78.4%	79.8%	80.2%
Officer Compensation	4.3%	4.2%	4.4%	4.7%

- 7 You can also access additional ratios for an industry by clicking **Companies List** in the Industry Index report. This takes you to a list of companies operating in the industry. Select one of these major companies.

**Biotechnology Research Services**

**Industry Index**

Overview	Financials	Quarterly Industry Updates
Description	Trends & Opportunities	Executive Insight
Associated Industry Codes	News & Social	Business Challenges
<b>Companies List</b>	Call Preparation Questions	Glossary of Acronyms

COMPANIES LIST

Change View: [Grid] [Map]

25 per page [Dropdown]

« previous 1 2 3 4 »

Company	Sales	Employees	Gross Profit Margin
Howard Hughes Medical Institute Inc	2,741.92M	3,000	
<b>Charles River Laboratories International, Inc.</b>	1,681.43M	11,000	38.46%
Cervus Equipment Corporation	817.75M	1,646	18.25%

- 8 Hover over **Competition** and select **Competitive Landscape**.
- **Tip:** This option will not be available for all companies in Hoovers.

**Charles River Laboratories International, Inc.**  
Wilmington, MA United States • NYSE CRL

This company is covered by Diane Ramirez.

**Company Index**

About This Company	Financials	<b>Competition</b>
Industry Information	Family Tree	<b>Competitive Landscape</b>
News & Social	Earning Estimates	Competitors List
Products & Operations	People & Contacts	

WEB VOLUME AND NOTEWORTHY ACTIVITY

Volume [Line Chart]



**9** You can scroll through this report and access ratios for the company, some of its peers, and the industry. This report includes ratios for profitability, valuation, operations financials, per share data, and growth.

- **Tip:** Not all sections of the report will have data.

2016 Profitability						
	Charles River Laboratories	Covance	Jackson Laboratory	Harlan Laboratories	Industry Median	Market Median <sup>1</sup>
Gross Profit Margin	38.46%	28.31%	--	--	46.59%	39.35%
Pre-Tax Profit Margin	13.26%	8.16%	--	--	(35.49%)	6.76%
Net Profit Margin	9.20%	6.67%	--	--	(24.02%)	5.68%
Return on Equity	19.72%	11.41%	--	--	(10.81%)	5.93%
Return on Assets	6.48%	7.23%	--	--	(17.92%)	1.85%
Return on Invested Cap	--	--	--	--	(1.14%)	4.96%

This guide only focuses on resources that can be accessed off-campus. The [Bloomberg Terminal](#) is another excellent resource for industry financial performance data; however, it can only be used in the Peter F. Bronfman Business Library. For more information, visit the BRYT (Business Research at York Toolkit) section of York University's Library website.