

## York University

### Business Research at York Toolkit (BRYT)

#### Video transcript: Locate strategy information in publicly-traded filings with Lexis Securities Mosaic

Publicly-traded companies are required to submit filings, like annual reports, quarterly reports, and prospectuses, to securities regulators such as the Ontario Securities Commission. Filings contain a wealth of information that you can use for your business research assignments.

**Lexis Securities Mosaic** is a database that contains full-text filings for Canadian companies from 1997 to the present and American companies from 1994 to the present.

To access it, go to York's Library homepage, type Lexis Securities Mosaic into the search field, select Title Keyword Search and click Find. From here, click the link to launch it. If you're accessing the database off-campus, it will prompt you to sign in with your Passport York ID. The SEC Filings search is where you would go if you're researching an American company while the SEDAR filings search is where you would look for a Canadian company. If you click on SEDAR filings, you can type in your keywords, the company's name, the document type, and the dates that you want to search for. The advanced search page has some other useful categories and helpful tips – let's go there. Here you'll see the same text entry fields, but with a few additions. If you're not sure what search strategies to use for this database, view the helpful list under the Learn more link. This page shows you how to do phrase searching and explains that Mosaic returns variant forms of a word automatically. For example, if you put in a word like strategy, Mosaic will return results with strategic and strategizing since these are variant forms of the word, strategy. You don't always have to search for a specific company. For example, you might be interested in companies that have formed a strategic alliance in a particular industry. So, you could search the phrase "Strategic alliance" in the text search. Put double quotations around it so the database searches for it as an exact phrase. Then, click on Change beside all industries, add the industry you're interested in, and click ok. When you click Search, this generates a list of filings for companies in the agricultural industry where a strategic alliance was mentioned. You can see the type of filing right under the name of the company. You can refine your search by using any of the post-search filters on the left.

The last thing I want to highlight are the available support tools. Just click on the Support tab and select Resource Center. There are a number of different videos, and guides to explore!

Thanks for watching! If you need more help finding filings, check out our other resources on BRYT's website, click the button to subscribe to our YouTube channel, or go to the Filings section of our Company Research Guide.