

Video Transcript: Find public company financial performance information

Hi! I'm Stephanie from the BRYT team. Sometimes you need to take a thorough look at a company's financial performance. A Google search or a trip to the company's website might get you a stock price or some high-level performance indicators, but that's often not enough. Today, I'll show you how to find detailed financials for a publicly-traded company using Factiva and Mergent Online. But first, I'd like to point out that the best tool to use for public company financial data is the Bloomberg terminal! This database provides access to real-time company financial information. It's an industry standard when conducting finance research. However, the terminals can only be accessed on-campus. Stop by the Bronfman Business library and a librarian can help you get started. You can also learn more about Bloomberg on the York University Libraries website. Click Research Guides, then Business & Economics, and then Bloomberg Getting Started Guide. This guide has instructions, tips, and tricks for using this powerful finance research tool. You can Book a Bloomberg Terminal ahead of time for up to 2 hours or drop in and see if one is available. If you can't get to the library, don't worry! Factiva and Mergent Online are excellent resources for public company financials and they can be accessed off-campus.

Factiva has extensive coverage of international public companies, while Mergent Online has more of a North American focus. I'm going to show you how to use these databases to locate financial information for Sienna Senior Living, a healthcare facilities and services company. For more recent information, start with Factiva. Their database only goes back four years. We'll start at the York University Libraries website. Type Factiva into the search field and click Find. Click Click to access this resource.

Hover over Companies/Markets and click Company. Type Sienna Senior Living in the search field and select the first option in the list. This gives us a great overview of the company. For financial performance information, click Financial Results. The default view is the annual balance sheet. Click the statement type drop-down menu for more options. Let's look at their annual income statement. Click go to refresh the data. For more information, click show details. If you want to export the data to an Excel spreadsheet, click Spreadsheet. If you're unfamiliar with any terms, click Glossary to find a definition. To access company ratios. Click reports. Use the drop-down menu to select Ratio Comparison Report, and then click View Report. This document includes company ratios alongside the relevant industry and sector ratios. As you can see, Factiva provides a complete picture of Sienna Senior Living's financial performance over the last four years. For a more long-term look, use Mergent Online. Their database goes back much further than Factiva's. Again, we'll start at the Libraries website. Type Mergent Online into the search field and click Find. Click Click to access this resource. Type Sienna Senior Living in the company search field and select the name from the list. Click Company Financials. There's a lot of information here. The default display is financial data As Reported, but you can view Prelims, Standardized or Restated data, and financial Ratios or Analysis. You can customize your data using the drop-down menus. For example, you can view data by annuals or quarters. Let's choose quarters. You can view a balance sheet, income statement, retained earnings, cash flow, or all sections at once. Let's select income statement. You can also select a date range for your data. Since Factiva only gave us the last four years, let's choose 15 years/quarters. You can also adjust the reported currency and reported scale. Let's leave these as the defaults. Click Refresh to update the data. To download the data to an Excel spreadsheet, click Download. To access company ratios, click Ratios. Use the drop-down menus to select Annuals or Quarters, and a length of time. Click Refresh. Then, click Download to export the data to an excel spreadsheet. With the information from Factiva and Mergent Online, we now have a comprehensive short and long-term view of how Sienna Senior Living is performing. Now you know how to use Factiva and Mergent Online

to find financial performance information for a publicly-traded company. Thanks for watching! For more tips on business research, check out all the demos in the BRYT site, or the Bronfman Library's YouTube channel.