

## Video Transcript: Finding Public Company Financial Statements and Filings

Hey there, I'm Stephanie from the BRYT team. Today I'll show you how to find financial statements for publicly traded companies. It's easier to find financial info for a publicly traded company rather than a private one. That's because publicly traded companies are required to file financial reports with relevant securities commissions. The public can then access these documents to make informed investing decisions. However, free online resources don't usually package this info in a convenient way. Use the library databases, Mergent Online and Lexis Securities Mosaic to save time on research! Mergent Online provides access to quantitative financial data, like a company's balance sheet. It has a lot of useful advantages, such as the depth of its public company financial data, company ratios, and the ability to download everything to Excel. While Mergent gives you the data, you can then use Lexis Securities Mosaic to do keyword searches through public company filings like annual reports and find out what the company is saying about its financial performance! We'll start, as always, at the Library's homepage. Type in Mergent Online, and click Find. Click to access this resource. We'll use Ballard Power Systems as an example. This company focuses on providing fuel cells in local and international markets like China. First, type the company's name into the Company Search field. Then select it from the drop-down menu. Take a few minutes to explore all of the tabs on this screen. You can easily scan owners and execs, browse the company's history and find competitors. Let's focus on the company financials. Click the Balance Sheet drop-down menu and click All Sections. Then use the time period drop-down to select All Available Years. Hit Refresh. Now you have Ballard's annual financials from 2016 all the way back to 1992! Click the Excel download icon. Voila. Hold on: what's the story behind these numbers? Remember, a company's financials are essential info but they don't tell the whole story. For example, what are the company's future goals? How are they strategizing to reach them? To find out more about what Ballard Power Systems said about its goals, let's turn to Lexis Securities Mosaic. This database provides access to company filings such as annual reports or management's discussion and analysis. With Mosaic, you can use keywords to filter through a company's filings and locate info that provides more context to a company's financials. Let's start at the Library's homepage. Type in Lexis Securities Mosaic, and click Find. Then Click to access this resource. These 3 tabs are a good place to start: SEC Filings, SEDAR Filings, and UK filings. Since Ballard Power Systems is a Canadian company, click SEDAR Filings. Enter the Company's Name in the Company field. Remember how Ballard has business dealings in China? Let's put China in the Text field and see what we find! Under Document Type, click the drop-down menu. Select Management's Discussion and Analysis. This type of filing usually includes forward looking statements from a company's executives. Then click Search. Now we have 32 filings to review. You can sort them by Relevance or Newest/Oldest. You can further refine your results using filters on the left. Aha! This filing from 2017 shows us how Ballard has been focused on growing its business in China since 2015. That's company intel that definitely wasn't in the balance sheet. So that's how you can use both Mergent Online and Lexis Securities Mosaic to build a full financial picture for a publicly traded company. For more tips on business research, check out all the demos on the BRYT site, or the Bronfman Library's YouTube channel.