

Video Transcript: Learn about a public company's strategy with third party analyst reports

To research a publicly-traded company's strategy, you can look at third-party analyst reports. These reports are written by financial analysts who work at brokerages or investment firms, and issue "buy", "hold", and "sell" recommendations for stocks. You can use them to find out about a company's financial performance, locate sales and earnings forecasts, and other useful information. Thomson One - Investext will help you easily find these reports.

You can access Thomson One Investext through York's Library website. However, it only works in Internet Explorer and you have to configure IE to allow pop-ups. Check out the guide on BRYT's website or come to the Bronfman Library if you're still having trouble. To access Thomson One from the library's homepage, just type Thomson One Investext into the search field, select Title Keyword Search, and click Find. From here, click the link to launch it. If you're off-campus, you'll need to sign in with your Passport York ID. To begin, hover over Screening and Analysis and select Research. This opens the Advanced Search page. Let's try to find analyst reports that mention Loblaw's strategies. To start, type the company's name into the company search field. The full name of the company should automatically populate. Next, choose the dates for your search. Let's choose the last two years. Under More Options you can enter some keyword search strategies. If you click on Search Tips, it gives you some nice examples. First, select Text as your keyword type. This will search the full-text of the analyst reports. Since I'm looking for Loblaw's company strategy, I'll type in strateg* with an asterisk. The asterisk allows you to search for all variant endings of the word, like strategic or strategy. Select And from the dropdown to add more keywords. The proximity operator is another useful search strategy. This is used to search for two words found nearby each other. For example, you can search for business and strategy within 20 words of each other. Typically, this means they'll be in the same sentence. To do this, you would type w20 and then add business.

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