Financial Information Resources

Listed below are resources for Financial information…

All databases are available by clicking "Articles and Databases" then "Databases by Name" from the library home page. Click on the letter that corresponds to the first word of the database name.

Preferred Resources

- Standard and Poor's
  - Business summaries, corporation records, financial statements, annual reports, ratios, and industry information.
- Mergent Online
  - Financial information for publicly traded companies. Includes business summary, stock information, ratios, annual reports, and financial statements.
- Thomson Research
  - Company filings, spreadsheet financials, and SEC Reports.

Additional Resources

Databases:

- Morningstar
  - After searching for a company, a number of links to key financial information will appear on the left.
- Business and Company Resource Center
  - Search for individual companies or industry overviews. SWOT analyses available for most companies. Click "financials" tab to view income statement, balance sheet, cash flow and ratios.
- Factiva
  - Click on the "Company" tab to enter the ticker symbol or company name to search. The link to company financials will appear on the left.

Web Sites:

- Yahoo! Finance Company and Fund Index
  - Company profiles and financial data for over 9,000 public companies.
- U. S. Securities and Exchange Commission
  - EDGAR database
- AnnualReports.com
  - Free company annual reports

- Financial Ratios (NET MBA)
  - Provides formulas for five frequently used ratios: Liquidity, Asset Turnover, Financial Leverage, Profitability, and Dividend Policy.
- Investopedia Financial Ratio Tutorial
  - Articles and tutorials about how to determine the following ratios: Liquidity Measurement, Profitability Indicator, Debt, Operating Performance, Cash Flow Indicator, and Investment Valuation.

Books:

- Epstein, L. (2009). *Reading Financial Reports for Dummies*. Hoboken, NJ: Wiley.
  -Library Call # 657.3 Ep851
- Thomsett, M. C. (2007). *Annual Reports 101: What the numbers and fine print can reveal about the true health of a company*. New York: American Management Association.
  - Library Call # 332.63T381a
  - Also available as an ebook in the ebrary database.
- *RMA Annual Statement Studies: Financial Ratio Benchmarks 2009-2010*
  - Library Call # REF 338.5 An784

Recommended Steps

The following steps are recommended for beginning company financial information research.

STEP ONE: Determine the company's ticker symbol. You may find this helpful when completing your research. Note: One way to look up company's ticker symbol is by using Yahoo Finance.

STEP TWO: Review the company's web site for current financials and annual reports. These are usually located in the "investor relations" section.

STEP THREE: For additional and historic financial information, here are detailed steps for finding financial information in the databases highlighted as "preferred resources."

- Mergent Online
  - Search by company name or symbol. Stock prices and basic company and financial information are under "Company Details" page. Click on "Company Financials" tab to view company balance sheets and ratios.
- Standard and Poor's
  - Search by company name or symbol, or select an industry overview from the drop down menu. When viewing a company profile, use the navigation on the left to select categories such as "financials" "valuation" (contains financial ratios), or "corporation records," among others.
- Thomson Research

- After entering a company in the “quick company search” box, financial information can be viewed under the headings “filings” “overview reports” and “spreadsheet financials” on the content profile page. Fundamental ratios are listed under “overview reports.”