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THOMSON REUTERS MARKETS ACADEMY

Discover the Essential tools in Datastream

Knowledge Network



THOMSON REUTERS

AIM — you will get to know...



- Searching for codes with using the Datastream Navigator
- Retrieving Data in Datastream AFO
- Retrieving and managing data efficiently on Excel
- Charting capability on Datastream
- Support Tools

AGENDA

- What is Datastream?
- Datastream Navigator
- Datastream Advance for Office (Excel Add-in)
 - Static Request
 - Time Series Request
 - Create List
 - Request Table
- Datastream Charting
- Extranet – AFO sample sheets
- Knowledge Network training website

What is Datastream?

- **Data** : Financial / Economic Database of Global Coverage
 - Historical data since 1950's, over 330 million time series
 - Largest Global Macroeconomic Database
 - Reliable estimates
- **Application** : Extended features on desktop & MS Office
 - Datastream Advance (Datastream Desktop)
Easy-to-use, pre-formatted charts and tabular reports with flexible charting
 - **Advance for Office (AFO)**
Build complex models and reports, data & charts can be linked in Excel, PowerPoint or Word to enable to create spreadsheets, presentations & documents

CONTENT COVERAGE - 1

Total number of time series: **over 330 million**

Total number of datatypes: **over 16,000**

Total number of instruments / indicators: **over 11 million**

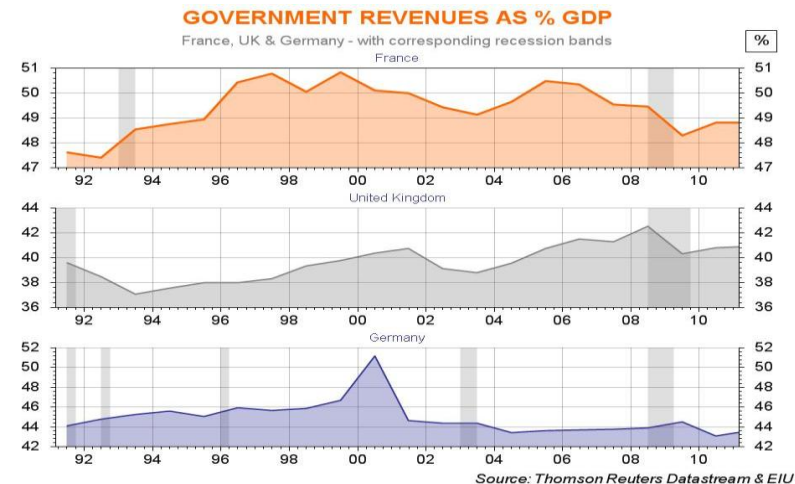
- Economics – **over 3 million economic time series covering 118 markets from national sources and international agencies. Histories back to 1950's for G7, 1970's for major markets, 1980's for emerging markets.**

- Macro Forecasts- **over 400 concepts from the OECD and Consensus Economics. Consumer and business confidence surveys and expectations from 125 sources.**
- Economics Point In Time- **As Reported Economics- G7 Markets, 10 years history → extend to G20**
- Equities – **98,500 live equity and 220,000 dead with extensive history to the 1960's**
- I/B/E/S Estimates – **analyst forecasts via 30 measures for some 22,000 active companies and 21,000 dead.**
- I/B/E/S Global Aggregates – **provide earnings forecasts on a Market, Region, Industry and Sector level.**



CONTENT COVERAGE - 2

- Fundamentals – Over 1,800 data items; 45,000 active Worldscope companies and 25,000 dead.
- Equity indices - 315,000 equity indices series, national sources, MSCI, DJ, FTSE, S&P and DS. Index constituents and sector aggregates detail with history back to 1960's.
- Fixed Income Securities (Bonds) - 276,000 active government and corporate bond issues across 31 markets. 500,000+ matured and called government and corporate bond issues.
- Global Exchange Rates – WMR, Tenfore, GTIS, Tullett Prebon, ECB and National Sources



CONTENT COVERAGE - 3

- **Commodities and Energy – More than 100,000 series including Platts, Metal Bulletin, ICIS and Goldman Sachs.**
- **Futures- covering 61 regulated exchanges across 36 countries covering over 2400 active contracts and over 200,000 series in total.**
- **Options- coverage of 2,955 active contracts with over 995,000 live series and 3.7 million expired series across 25 different countries**
- **Warrants- coverage consists of 235,000 active series with 1.4 million expired series across 28 countries**
- **Funds & Trusts- 235,000 funds, including 30,000 UK trusts. Complete coverage of UK investment trusts. Lipper integration forthcoming.**
- **Unique Content-** Proprietary Equity & Bond Indices, CDS sector indices, Fitch PD series, M&A indices and valuation ratios



Datastream Navigator

The screenshot displays the Datastream Navigator application window. The main interface is titled "Datastream Navigator" and includes a navigation menu with options like "Series Search", "Charting", "UCI", "UCTS", "Help Browse", "Extranet", "Contact Us", and "Help". The current view is "Series Search", showing a search for "Economics" with "Free Text Search" and "Advanced Search" buttons highlighted. The search results are for "Global Consumer Confidence (List M#CNFCONX)" with 75 displayed results. A list of series is shown, including "CONSUMER CONFIDENCE INDEX: NATI", "MELBOURNE/WESTPAC CONSUMER SE", "FESSEL - GFK SURVEY: CONSUMER CON", "BNB CONS. SVY.: CONSUMER CONFIDE", "CONSUMER CONFIDENCE INDEX - SAO P", "CONSUMER CONFIDENCE INDICATOR", "CONSUMER CONFIDENCE INDEX", "CONSUMER EXPECTATIONS", "CONSUMER CONFIDENCE INDEX", and "CONSUMER CONFIDENCE INDICATOR". A detailed view of the "Advanced Search" panel is shown in an inset, featuring fields for "Name", "DS Mnemonic", "Market", "Classification", "Dataset", "Source", and "Frequency".

The Navigator provides different levels of searching enabling to find and select series as effectively as possible through the Free Text Search, Advanced Search or Explorer.

Datastream Navigator – Free Text Search

Datastream Navigator Series Search

Charting UCI UCTS Help Browse Extranet Contact Us Help

Datastream Navigator THOMSON REUTERS

Data Category: Equities Equities Explorer Advanced Search

Search: Search

Refine Search

Market

- Australia 21
- United Kingdom 10
- India 1
- Slovakia 1
- South Korea 1
- Thailand 1

Currency

- Euro 12
- Australian Dollar 9
- United Kingdom Pound 3

Exchange

- Australian 8
- Frankfurt 7
- XETRA 5

Type

- Equity 27
- American Depository Receipt 6
- Preference Share 2

Changes on Datastream

NASDAQ OMX changes to ICB classification 1 Feb 2012

Navigator 4.2 - significant enhancements to the explorer interface - 25th Feb

Results for bhp 1-10 of 35 Next >

Name	Symbol	Hist.	Market	Currency	Exchange	Type
☆☆☆☆ BHP BILLITON	A:BHPX	39Y	Australia	Australian Dollar	Australian	Equity
> ☆☆☆ BHP BILLITON	BLT	14Y	United Kingdom	United Kingdom Pound	London	Equity
> ☆☆☆ BHARAT PETROLEUM	IN:BHP	19Y	India	Indian Rupee	National India	Equity
> ☆☆☆ BEST HOTEL PROPERTIES	SK:BHP	2Y	Slovakia	Euro	Bratislava	Equity
> ☆☆☆ BHP BILLITON (JSE)	R:BILJ	14Y	United Kingdom	South African Rand	Johannesburg	Equity
> ☆☆☆ BHP BILLITON (FRA)	D:BIL	9Y	United Kingdom	Euro	Frankfurt	Equity
> ☆☆☆ BHP BILLITON (FRA)	D:BHP 1	12Y	Australia	Euro	Frankfurt	Equity
> ☆☆☆ BHP BILLITON (XET)	D:BH1X	10Y	Australia	Euro	XETRA	Equity
> ☆☆☆ BHP BILLITON (XET)	D:BILX	7Y	United Kingdom	Euro	XETRA	Equity
> ☆☆☆ BHP BILLITON ADR 1:2	U:BHP	39Y	Australia	United States Dollar	New York	American Depository Receipt

Explore more results like these: [By Market/Sector » Australia » Mining](#)
[By Market/Sector » United Kingdom » Mining](#)
[By Market/Sector » India » Oil & Gas Producers](#)
[By Market/Sector » Slovakia » Travel & Leisure](#)

BHP Billiton

Mnemonic Code ISIN SEDOL Local Code
A:BHPX 906169 AU000000BHP4 6144690 A:BHP

Latest Value 36.66 (AUD)
Timespan 1/01/1973 - 13/02/2012, Daily

Coverage IBES, MSCI, WorldScope
Market Australia
Currency Australian Dollar
Exchange Australian
Type Equity

Explorers [By Market/Sector » Australia » Mining](#)
Related [Display Related Constituent Lists](#)
[Display Related Equity Indices](#)
[Display Related User Created Indices](#)

Notes BHP Billiton Limited is a diversified natural resources company. The Company operates nine customer sector groups (CSGs): petroleum, aluminium, base metals (including uranium), diamonds and specialty products, stainless steel materials, iron ore, manganese, metallurgical coal and energy coal. During the fiscal year ended June 30, 2010 (fiscal 2010), the Company realized an annual production volume of 158.56 million barrels of oil equivalent. During fiscal 2010, the company produced 1.2 million tonnes of aluminium. It also produced 13.9 million tonnes of bauxite and 3.8 million tonnes of alumina. On March 23, 2010, the Company completed the acquisition of Athabasca Potash Inc (API). In July 2011, BHP Billiton Limited acquired Petrohawk Energy Corp. In September 2011, the Company acquired Leighton Holdings Limited's Pilbara Contracting Unit.

© Worldscope

Price (Adjusted-Default)

Source: Thomson Reuters Datastream

P MV DY PE PI RI All Last

Datastream Navigator - Explorer

The screenshot displays the Datastream Navigator Explorer interface. At the top, the window title is "Datastream Navigator". Below the title bar, there is a "Series Search" section with navigation links: "Charting", "UCI", "UCTS", "Help", "Browse", "Extranet", "Contact Us", and "Help". The main header area includes the "Datastream Navigator" title and the Thomson Reuters logo. The "Data Category" is set to "Economics". An "Advanced Search" link is visible on the right.

A search box on the left contains the text "Exploring Economics » Key Indicators by Economic Category » National Accounts". The main content area is a hierarchical tree structure with four columns:

- Economics**
 - » Equities
 - » Equity Indices
 - » Commodities
 - » Exchange Rates
 - » Interest Rates
 - » Bond Indices
 - » Credit Default Swaps
- Key Indicators by Economic Cate.**
 - » Key Indicators by Country
 - » Point in Time Restricted Content (use
 - » National Sources
 - » International Historical Sources
 - » International Forecasts & Surveys
 - » International Industry Associations
 - » Previous 3rd Party Explorers
- National Accounts**
 - » Surveys & Cyclical Indexes
 - » Money & Finance
 - » Prices
 - » Labour Market
 - » Consumer Sector
 - » Industry Sector
 - » Government Sector
 - » External Sector
- GDP by Expenditure**
 - ▼ Personal Consumption
 - ▼ Government Consumption
 - ▼ **Incomes**
 - ▼ Investment/Capital Formation
 - ▼ Changes in Stocks
 - ▼ GDP Deflators
 - ▼ Exports
 - ▼ Imports

Datastream Navigator- Metadata Display

Datastream Navigator | Charting | UCI | UCTS | Help | Browse | Extranet | Contact Us | Help

Datastream Navigator | THOMSON REUTERS | [Advanced Search](#)

Data Category: **Economics**

Exploring **Economics** » **Key Indicators by Economic Category** » **National Accounts** » **GDP by E...**

Refine Search

Global Gross Domestic Product (List M#GDPX) (filtered) 1-101

Market	Name	Symbol	Hist.
Albania	GDP AT BASIC PRICES	ALGDP...D	6Y
Algeria	GDP (CON)	AAGDP...	40Y
Argentina	GDP (AR)	AGGDP...D	18Y

Argentina, Expenditure Approach, Gross Domestic Product, At market prices, Constant Prices, AR, SA, ARS, 1993 prices

Mnemonic: AGGDP...D | EcoWin Code: ew:arp01851

Latest Value: 465719 (Millions Argentine Peso, 1993 PRICES)

Timespan: Q1 1993 - Q3 2011, Quarterly

Last Updated Date: 16/12/2011

Conversion Method: Average

Market: Argentina

Source: MECON - Ministerio de Economia y Production, Republica Argentina

Adjustment: Constant prices,seasonally adjusted

Explorers: [Key Indicators by Country](#) » [Argentina](#) » [Key Indicators by Economic Category](#) » [National Accounts](#) » [GDP by Expenditure](#) » [National Sources](#) » ... » [Constant Prices](#)

Notes: **Definitional, revision and referral notes**
 The source presents values for each quarter multiplied by 4. In order to obtain quarterly data one should divide values from the series by 4. The GDP of a country is defined as the market value of all final goods and services produced within a country in a given period of time. The data cover the entire economy. It is not a precise measure of national economic well-being but expressed in volume (adjusted for inflation) it is the closest single number we have got to such a measure. It is the sum of final expenditures.

Esc key closes this window

>	★★★★	Euro Area, Evolving Membership	GDP	EMGDP...D	16Y
>	★★★★	Finland	GDP	FNGDP...D	36Y

Search Result from Datastream Navigator

THOMSON DATASTREAM NAVIGATOR Series Search UCI Create/Modify UCTS Help Browse Interactive Charting

Data Category: Equities

Set Criteria Retrieve Results Explorer Display

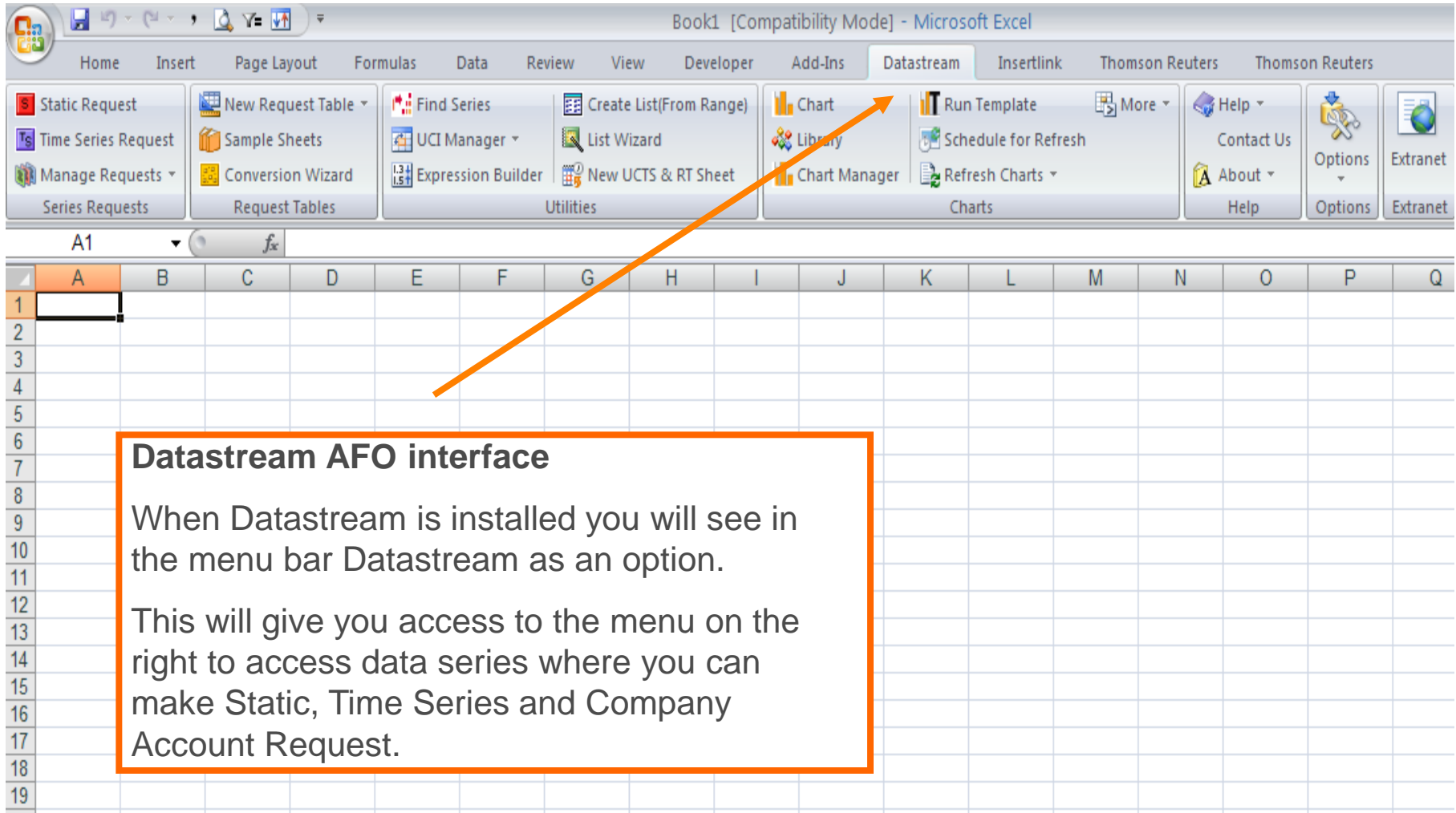
Name	DS Mnemonic	DS Code	Market	Base Date	Currency	IBES	MSCI	WS	Primary
COCA COLA	U:KO	904282	United States	Jan 2 1973	United States Dollar	Yes	Yes	Yes	Yes
COCA COLA (FRA)	D:CCC3	951259	United States	Sep 26 1988	Euro	No	No	Yes	No
COCA COLA (LIM)	PE:KO	274630	United States	Aug 10 1999	United States Dollar	No	No	Yes	No
COCA COLA BT.CON.S.	@COKE	906847	United States	Jan 2 1973	United States Dollar	Yes	Yes	Yes	Yes
COCA COLA BT.CON.S. (FRA)	D:CC5	14477R	United States	Aug 31 2001	Euro	No	No	Yes	No
COCA COLA BT.CON.S. (XET)	D:CC5X	14496F	United States	Feb 19 2002	Euro	No	No	Yes	No
COCA COLA CERT. (SWX)	S:KO	982123	United States	Jul 16 1990	Swiss Franc	No	No	Yes	No
COCA COLA ENTS.	U:CCE	741521	United States	Nov 21 1986	United States Dollar	Yes	Yes	Yes	Yes
COCA COLA ENTS. (FRA)	D:COX	13404J	United States	Jan 11 2001	Euro	No	No	Yes	No
COCA COLA ENTS. (XET)	D:COXX	14509C	United States	Oct 26 2004	Euro	No	No	Yes	No
COCA COLA HELLENIC (OTC)	@CCHOF	15256V	Greece	Apr 17 2001	United States Dollar	No	No	No	No
COCA COLA HELLENIC CDI.	A:CHBX	263855	Greece	Sep 1 2000	Australian Dollar	No	No	No	Yes
COCA COLA HLC.BT. (XET)	D:CCKX	14612R	Greece	Jun 4 2002	Euro	No	No	Yes	No
COCA COLA ICECEK	TK:COQ	35912K	Turkey	May 11 2006	Turkish Lira	Yes	Yes	Yes	Yes
COCA COLA ICECEK GDR (REG S)	CICE	676216	Turkey	Feb 17 1998	United States Dollar	No	No	No	Yes
PANAMA COCA COLA BT.	@PCOK	26625H	United States	May 21 2002	United States Dollar	No	No	No	Yes

Corresponding Codes required to retrieve data for that company

Base Date shows how far back the data goes for that company

Tells you if there are estimates from IBES

Retrieving Data in AFO



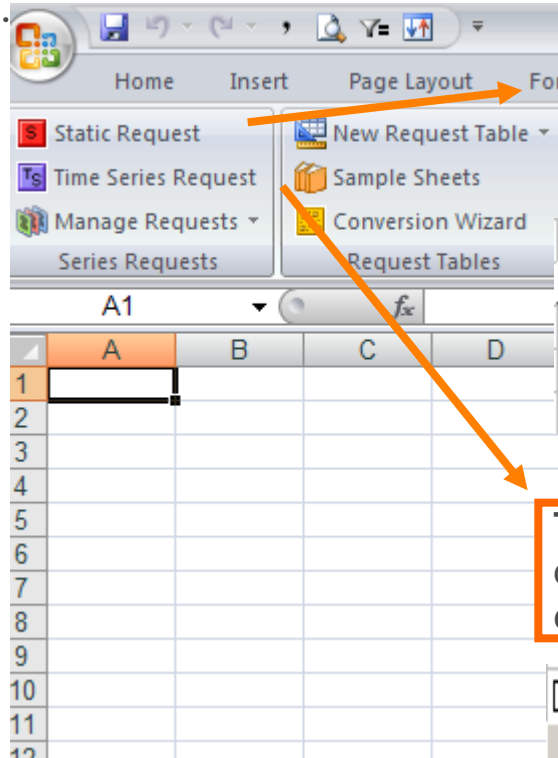
The screenshot shows the Microsoft Excel interface with the 'Datastream' ribbon selected. The ribbon contains several groups of options: 'Series Requests' (Static Request, Time Series Request, Manage Requests), 'Request Tables' (New Request Table, Sample Sheets, Conversion Wizard), 'Utilities' (Find Series, UCI Manager, Expression Builder, Create List(From Range), List Wizard, New UCTS & RT Sheet), 'Charts' (Chart, Library, Chart Manager, Run Template, Schedule for Refresh, Refresh Charts), and 'Help' (Help, Contact Us, About). An orange arrow points from the 'Datastream' ribbon to a callout box. The callout box has an orange border and contains the following text:

Datastream AFO interface

When Datastream is installed you will see in the menu bar Datastream as an option.

This will give you access to the menu on the right to access data series where you can make Static, Time Series and Company Account Request.

Retrieving Data in AFO



Static requests: To request data for a specific date. For example, the price, PE and dividend yield for stocks for 01/01/05

DS trigger					
Refresh	12/31/2004				
Type	P	PE	DY	CURRENCY	
U:PEP	52.2	21.9	1.76	U\$	
U:KO	41.64	22.1	2.4	U\$	

Time series requests: To request data over a specific period, defined by a start date, end date, and frequency of data. For example, the daily price for Pepsico from 01/01/05 to 01/01/06

DS trigger						
Refresh	12/31/2004					
End	12/30/2005					
Frequency	D					
Name	Code	CURRENCY	12/31/2004	1/3/2005	1/4/2005	1/5/2005
PEPSICO	U:PEP(P)	U\$	52.2	51.94	51.57	51.63

Datastream Time Series Request

The image shows two overlapping windows from a financial software interface. The top window is titled "Time Series Request" and contains fields for "Series/Lists" (with a search icon), "Datatypes/Expressions" (with a formula icon), and checkboxes for "Display Data As MSChart" and "TS for each item in list". Below these are several "PAD#" and "PCH#" entries. The bottom window is titled "Datastream Navigator" and shows a search interface with a "Data Category" dropdown set to "Equities". It includes search filters for "Name", "Market Value", "Datatype", "Key WS Item", and "Worldscope Level". A table of search results is displayed, listing various FTSE Market Value series with their mnemonics and Worldscope levels.

Time Series Request

Request Details

Series/Lists AUCONPRCF,CHCONPRCF,FNCONPRC

Display Data As MSChart
 TS for each item in list

Datatypes/Expressions F

- PAD#
- PAD#
- PCH#
- PCH#

Find Series

Datatypes

Datastream Navigator

THOMSON DATASTREAM NAVIGATOR Datatype Search Interactive Charting

Data Category: Equities

Find Name Contains Market Value And Name Contains

Datatype All Static Time Series Key WS Item All No Yes Worldscope Level All Company Security

	Name	Mnemonic	Worldscope
	FTSE Market Value In US (Excludes Weighting Factor)	FTSMVUSU	
	FTSE Market Value In US (Includes Weighting Factor)	FTSMVUSD	
	FTSE Market Value In US After Applying The Growth Factor	FTSMVUSG	
	FTSE Market Value In US After Applying The Value Factor	FTSMVUSV	
	FTSE Market Value-Local Currency	FTSMV	
	Market Value (Capital)	MV	

Help Default Options Submit Cancel

Click Find Series to display Datastream Navigator, then select series from result list to be displayed in Series/List field.

Click Datatypes to display Datastream Navigator, then select series from result list to be displayed in Series/List field.

Datastream Time Series Request

	A	B	C	D
1	Refresh	BHP BILLITON	FORTESCUE METALS GP.	S&P/ASX 300 - PRICE INDEX
2	Code	A:BHPX	A:FMGX	ASX300I
3	20/01/2012	37.48	5.19	4236
4	19/01/2012	37.34	5.06	4212
5	18/01/2012	37	5.05	4214
6	17/01/2012	36.7	4.8	4212
7	16/01/2012	35.98	4.62	4144
8	13/01/2012	36.6	4.75	4192
9	12/01/2012	36.37	4.66	4177
10	11/01/2012	36.18	4.69	4183
11	10/01/2012	35.66	4.57	4148
12	9/01/2012	35.2	4.46	4102
13	6/01/2012	35.24	4.44	4104
14	5/01/2012	35.82	4.51	4138
15	4/01/2012	36.22	4.62	4182
16	3/01/2012	34.8	4.41	4097
17	2/01/2012	34.42	4.27	4052
18	30/12/2011	34.42	4.27	4052
19	29/12/2011	34.5	4.26	4058
20	28/12/2011	34.57	4.35	4084
21	27/12/2011	35.15	4.49	4135
22	26/12/2011	35.15	4.49	4135
23	23/12/2011			
24	22/12/2011			
25	21/12/2011			
26	20/12/2011			
27	19/12/2011			
28	16/12/2011			
29	15/12/2011			
30	14/12/2011			
31	13/12/2011			

A **Frequency** format option enables you to define periodicity of the data required.

Time Series Request

Request Details

Series/Lists Datatypes

Display Data As MSChart DS,ISIN etc.

TS for each item in list T1 Code

Datatypes/Expressions Datatypes

Start Date Frequency

End Date

Options

Display Custom Header

Display Row Titles

Display Column Titles

Display Headings

Transpose Data

Display Code

Display Currency

Display Latest Value First

Hyperlink to Series Metadata

Hyperlink to Datatype Definition

Display Expression

1st Series

Description

Display DataType

Description

Mnemonic

Embed

Auto Refresh

Visible Button

Options allow you to format the results.
 Note: *Auto Refresh* allows the sheet to be refreshed automatically each time it is opened.

Embed allow to edit/refresh data afterward.

Exercise 1 – Static Request

- List the underlying companies of ASX 200 index with company names , ISIN and Last (Close) Price.

Hint

- List Code: LASX200I
- Datatypes: NAME,ISIN,P

Exercise 2 - Time Series Request

- Compare the share price, market capitalisation (market value) and PE for a list of companies (2 year history) below.
 - CBA (Australia)
 - NAB (Australia)
 - Westpac (Australia)
 - HSBC (Hong Kong)
 - Standard Chartered (UK)
- Try to convert all data to US dollar

Exercise 3 - Time Series Request

- Compare the index price (PI) of indices (2 year history) below.
 - ASX 200 (Australia)
 - Hang Seng Index (Hong Kong)
 - FTSE 100 (UK)
 - Nikkei 225 (Japan)
 - SP 500 Composite (US)
- Try to change the data for rebasing (=100) as base date is the start of the data.

Exercise 4 - Time Series Request

- For the countries below, list 10 year benchmark bond yield for last year.
 - Australia
 - US
 - Italy
 - Germany
 - UK

Hint: Find data is in “Economics” or “Interest rates” category in Navigator

Exercise 5 - Time Series Request

- For the countries below, list GDP (Actual, Seasonally Adjusted) since Q1 2005.
 - Australia
 - US
 - Japan
 - Italy
 - France
 - UK

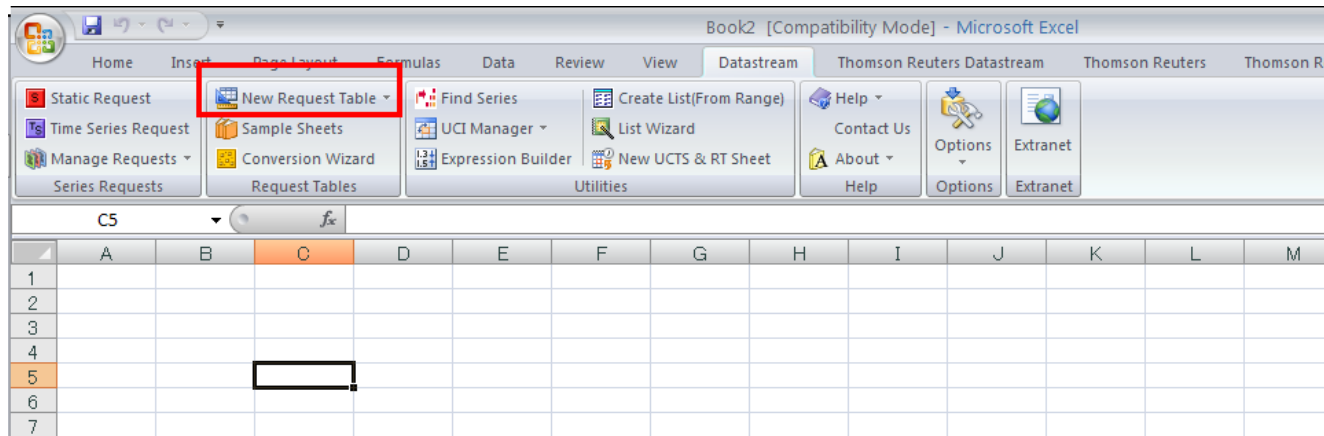
Hint: xxxxx...D indicates Actual, Seasonally Adjusted

Exercise 6 – Create own request table

- Download BHP's static & Historical data

Task

- Row 1 – static
- Row 2 - historical



Exercise 6 – Screen shot

On Completion Macro: Display Details

On Completion: Refresh Charts Refresh Chart Templates

Scheduled Update at:

Process Table Add to Index Schedule Options Help Find Series

Press Ctrl + R to Process Table

Update	Request Type					Format	Series Lookup	Datatype/Expressions/CAF/Search Lookup				Start Date	End Date	Freq		
Y	Y/N	N	S	TS	TSL	CAF	CH	SCH	L	Select Format	Find Series	Datatypes	fx	CAF	SCH	Daily
YES			S							RCT	A:BHPX	ISIN,LOC,SECD,DY,EPS,MV,MVC,MNEM,P				

1 THOMSON REUTERS DATASTREAM Request Table 5.1

2 On Open Process Table Always Return Currency

3 Pre-Request Macro: ScreenRefresh/Auto-calc Off

4 On Completion Macro: Display Details

5 On Completion: Refresh Charts Refresh Chart Templates

Scheduled Update at:

Process Table Add to Index Schedule Options Help Find Series

Press Ctrl + R to Process Table

Update	Request Type					Format	Series Lookup	Datatype/Expressions/CAF/Search Lookup				Start Date	End Date	Freq		
Y	Y/N	N	S	TS	TSL	CAF	CH	SCH	L	Select Format	Find Series	Datatypes	fx	CAF	SCH	Daily
NO			S							RCT	a:bhpx	isin,loc,secd,dy,eps,mv,mvc,mnem,p				
YES			TS							RC	a:bhpx	p		-2y		daily

Tips for Constituent List search in Navigator

The screenshot shows the Datastream Navigator web application. The search bar contains the text "asx 200" and a "Search" button. The "Data Category" is set to "Constituent lists". The "Help Browse" menu item is highlighted with a red box. Below the search bar, there are options for "Explore", "Recent Searches", "Use Search Ref", and "Searching Hints". The "Results for asx 200" section is partially visible, showing a table with columns for "All", "Name", and "ID".

The screenshot shows a dialog box titled "Equity Lists (HELP EQLI?)". It contains a list of equity lists categorized into "United Kingdom" and "Non UK Equity Lists". The list is numbered 1 through 12, and each item is followed by a number and a description. The dialog box has a "Cancel" button, a "<< Home" button, a "< Back" button, a "Next >" button, a "Go to" button, and an "Finish" button. A red text prompt at the bottom says "Double click on number to goto next."

Category	Number	Description
United Kingdom	1	UK Equity Lists
	2	Investment Trusts
Non UK Equity Lists	3	Africa
	4	North America
	5	Australasia
	6	Europe
	7	Asia
	8	Middle East
	9	South America
	10	Dow Jones Constituent
	11	Company Accounts Lists-All Areas
	12	I/B/E/S Coverage
	14	MSCI Constituent Lists
	16	FTSE World Indices
	17	FTSE Tradable
	18	S&P International Indices
	19	Historical Constituent Lists & Weights-Overview & A-F
	20	Historical Constituent Lists & Weights-Overview & G-U
	21	Default Indices
	50	Discontinued Lists
	99	Worldscope: Country Lists

Exercise 7 – Create own request table

- Download static & historical data of my own Australian material company portfolio.

Task

- Create own portfolio list.
- Open request table
- Download static data for portfolio
- static Data types: ISIN,LOC,SECD,DY,MV,MNEM,NAME,P and price change for 1M,6M
- Time series Data: P
- Time series data for 5 years monthly basis.
- Time series data Top 10 performer of last 1 month.

Exercise 7 - Steps

- static – Codes, Name & GICS → Sort Materials
- Create your list – Create list (from range)
- Request table
 - Row 1 static request – data to sheet1
 - Row 2 Time series – data to sheet2
 - Row 3 list
 - Row 4 Time series

Exercise 7 - screen shot

On Completion: Refresh Charts Refresh Chart Templates
 Scheduled Update at:

Press Ctrl + R to Process Table

Update		Request Type					Format	Series Lookup			Datatype/Expressions/CAF/Search Lookup				Start Date	End Date	Frequency			
Y	Y/N	N	S	TS	TSL	CAF	CH	SCH	L	Select Format	Find Series		Datatypes	fx	CAF	SCH			Daily	
	NO					S				RC	BankANew_0000.LLT		name,mnem,p,pch#(x,1m),pch#(x,12m)							
	YES					TS				RC	=E7		P					-1Y		daily

On Completion Macro:
On Completion: Refresh Charts Refresh Chart Templates
Scheduled Update at:

Press Ctrl + R to Process Table

Update		Request Type					Format	Series Lookup			Datatype/Expressions/CAF/Search Lookup				Start Date	End Date	Frequency			
Y	Y/N	N	S	TS	TSL	CAF	CH	SCH	L	Select Format	Find Series		Datatypes	fx	CAF	SCH			Daily	
	NO					S				RC	BankANew_0000.LLT		name,mnem,p,pch#(x,1m),pch#(x,12m)							
	NO					TS				RC	=E7		P					-1Y		daily
	NO					L					stats!SD\$4:\$D\$15,L#G53293,V									
	YES					TSL				RC	L#G53293		p					-3Y		week

Exercise 8 - Econ data retrieval in Request table

- Create your own Key Australian Economic data request table

Task

- Request table
- Narrow down Quarterly basis Economic data in Navigator
- Raw data & Q/Q

Exercise 8 - Screen shot

Datastream Navigator

Data Category: **Economics**

Exploring *Economics* » *Key Indicators by Country* » *Australia*

Explore more Recent Searches Use Search Ref Text Search

Refine Search

Text

Search

Market

Australia (all)

Source +/-

Australian Bureau of Statistics 69

Reserve Bank of Australia 13

Westpac/Melbourne Institute 3

Frequency +/-

Quarterly 54

Monthly 38

Annual 1

Adjustment +/-

Current prices,seasonally adjusted 25

Constant prices,seasonally adjusted 13

Price index,not seasonally adjusted 12

Key Indicator List Australia (List M#AUKEY)

All			Name
>	<input type="checkbox"/>	★★	GROSS NATIONAL INCOME
>	<input type="checkbox"/>	★★★★	GROSS NATIONAL INCOME (CVM)
>	<input type="checkbox"/>	★★	GDP
>	<input type="checkbox"/>	★★★★	GDP (CVM)
>	<input type="checkbox"/>	★★	GDP (TREND, CVM)
>	<input type="checkbox"/>	★★	FINAL CONSUMPTION EXPENDITURE - HOUSEHOLD
>	<input type="checkbox"/>	★★	HOUSEHOLD FINAL CONSUMPTION EXPENDITURE (CVM)
>	<input type="checkbox"/>	★★	FINAL CONSUMPTION EXPENDITURE - GENERAL GOVERNMENT
>	<input type="checkbox"/>	★★★★	FINAL CONSUMPTION EXPENDITURE: GENERAL GOVT. (CVM)
>	<input type="checkbox"/>	★★	GFCF
>	<input type="checkbox"/>	★★★★	GFCF (CVM)
>	<input type="checkbox"/>	★★	INCREASE IN STOCKS
>	<input type="checkbox"/>	★★★★	INCREASE IN STOCKS (CVM)
>	<input type="checkbox"/>	★★	EXPORTS FOB - GOODS & SERVICES
>	<input type="checkbox"/>	★★★★	EXPORTS FOB - GOODS & SERVICES (CVM)
>	<input type="checkbox"/>	★★	IMPORTS FOB - GOODS & SERVICES
>	<input type="checkbox"/>	★★★★	IMPORTS FOB - GOODS & SERVICES (CVM)
>	<input type="checkbox"/>	★★★★	IPD OF GDP
>	<input type="checkbox"/>	★★★★	MELBOURNE/WESTPAC LEADING INDEX OF ECONOMIC ACTIVITY
>	<input type="checkbox"/>	★★★★	BOP: CURRENT ACCOUNT BALANCE
>	<input type="checkbox"/>	★★	BOP: GOODS - CREDITS

Exercise 8 - Screen shot using LIST request



DATASTREAM

Press Ctrl + R to Process Table

Pre-Request Macro:
 On Completion Macro:
 On Completion: Refresh Charts Refresh Chart Templates
 ScreenRefresh/Auto-calc Off
 Display Details
 Scheduled Update at:

Series Code To Cell

Update		Request Type					Format	Series Lookup			Datatype/Expressions/CAF/Search Lookup				Start Date	End Date	Freq		
Y	Y/N	N	S	TS	TSL	CAF	CH	SCH	L	Select Format	Find Series		Datatypes	fx	CAF	SCH			Daily
	NO				S					RC	#####		ESFREQ,ESMN,ESNAM,ENAME						
	YES				L						Sheet8!\$C\$7:\$C\$44,L#ECOMTH,V								
	YES				TSL					RC	L#ECOMTH							-5y	monthly

Refresh Chart Templates

Update		Request Type					Format	Series Lookup			Datatype/Expressions/CAF/Search Lookup				Start Date	End Date	Freq		
Y	Y/N	N	S	TS	TSL	CAF	CH	SCH	L	Select Format	Find Series		Datatypes	fx	CAF	SCH			Quarterly
	NO				S					RC	#####		ENAME,ECNAME,ESFREQ,MNEM,NAME						
	NO				L						Sheet1!\$E\$6:\$E\$43,L#ECOMTH,V								
	NO				TSL					RCK	L#ECOMTH							-10Y	monthly
	NO				L						Sheet1!\$F\$44:\$F\$97,L#ECOQTR,V								
	YES				TSL					RCK	L#ECOQTR		x,pch#(x,1q)					-10y	Quarterly

Exercise 9 - Individual company data

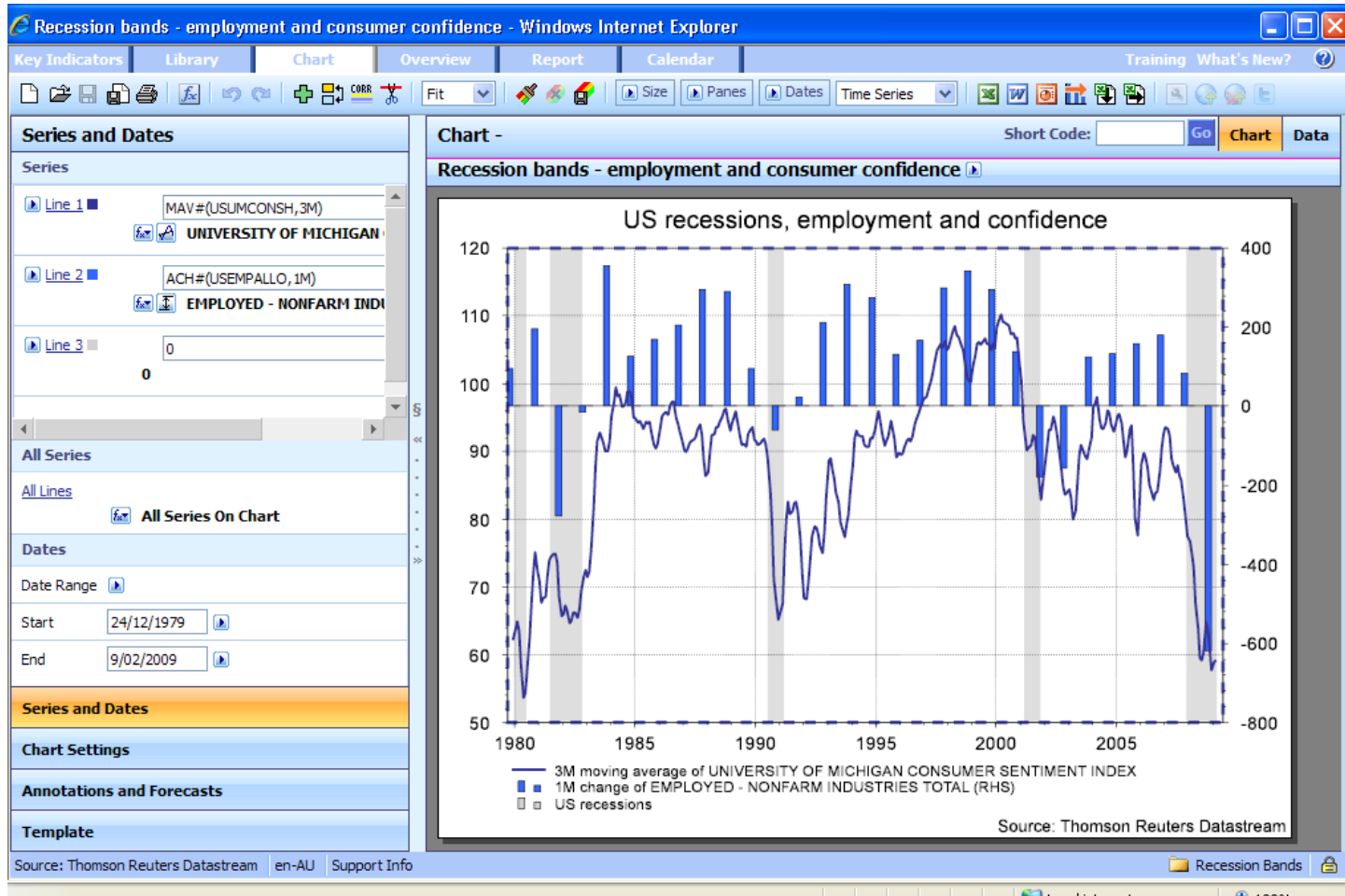
- World scope
 - Extranet home – Worldscope - (scroll down to bottom) Guides and other useful Documents
 - 4 category
 - Sample sheet
 - Balance sheet
 - Cash flow statement
 - Profit and Loss
 - Peer Comparison
- IBES data
 - Extranet home – I/B/E/S consensus –(scroll down to bottom) Guides and other useful documents
 - Estimates
 - Aggregate data

Accessing Datastream Charting

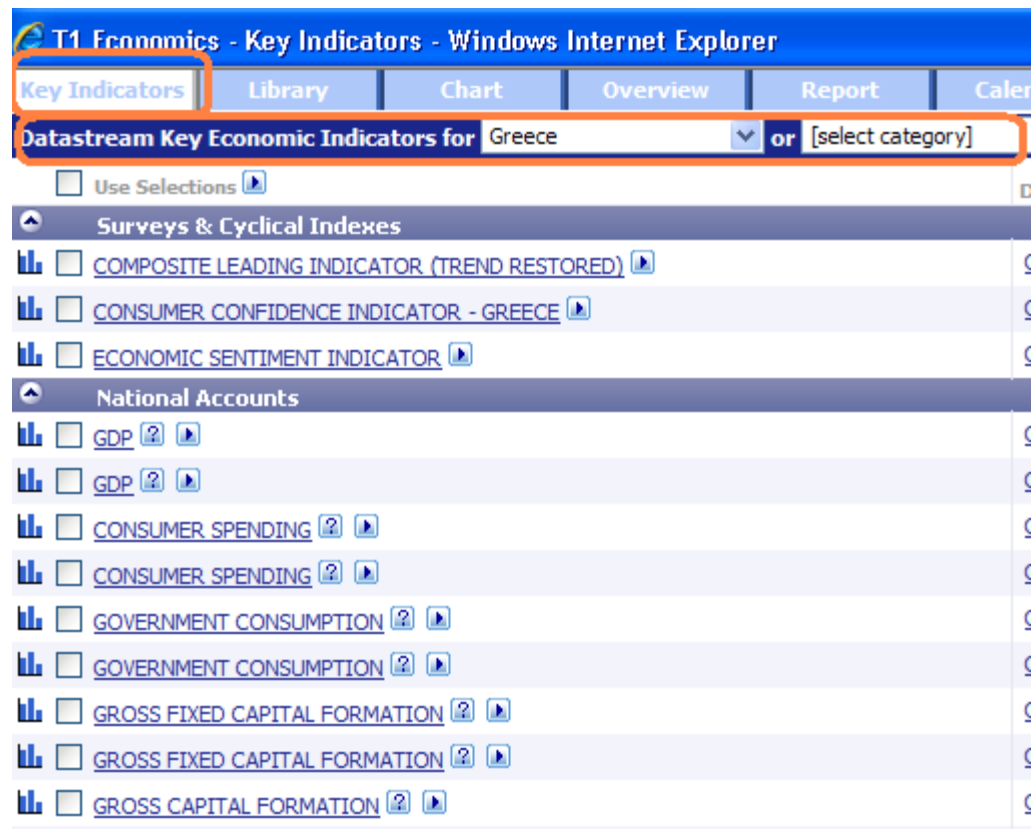
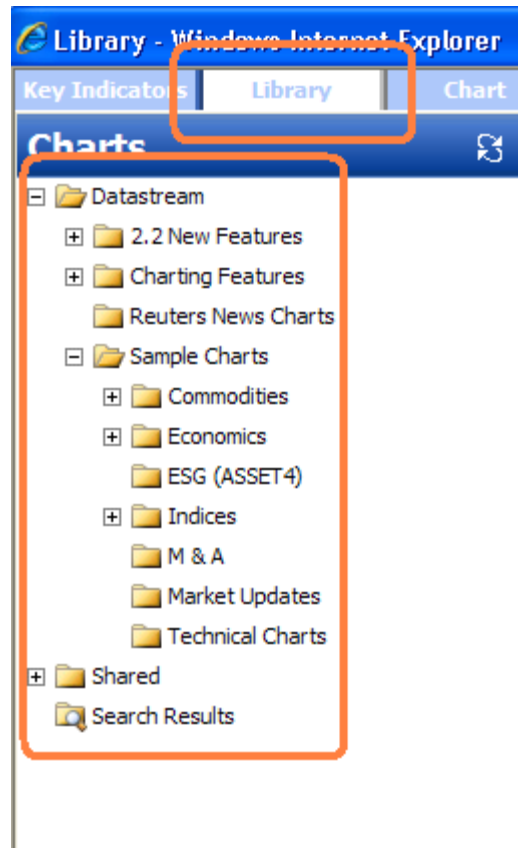
The screenshot shows the Microsoft Excel interface with the Datastream ribbon active. The ribbon contains several groups of tools: Series Requests (Static Request, Time Series Request, Manage Requests), Request Tables (New Request Table, Sample Sheets, Conversion Wizard), Utilities (Find Series, UCI Manager, Expression Builder, Create List(From Range), List Wizard, New UCTS & RT Sheet), and Charts (Chart, Library, Chart Manager). The Chart, Library, and Chart Manager options are highlighted with an orange box. Below the ribbon is the Datastream Navigator interface, which includes a Series Search section with tabs for Charting, UCI, and UCTS. The Charting tab is selected and highlighted with an orange box. The Datastream Navigator shows a search for 'australia unemployment' under the 'Economics' category. The search results are displayed in a table below.

Results for <i>australia unemployment</i>						
			Name	Symbol	Hist.	Source
>	<input type="checkbox"/>	☆☆☆	UNEMPLOYMENT LEVEL	AUUNPTOTO	33Y	Austral
>	<input type="checkbox"/>	☆☆☆	UNEMPLOYMENT RATE (LABOUR FORCE SURVEY ESTIMATE)	AUUN%TOTR	33Y	Austral
>	<input type="checkbox"/>	☆☆☆	JOB ADVERTISEMENTS	AUVACTOTO	12Y	Austral Group
>	<input type="checkbox"/>	☆☆☆	EMPLOYED: PERSONS	AUEMPTOTO	33Y	Austral

Datastream Charting page

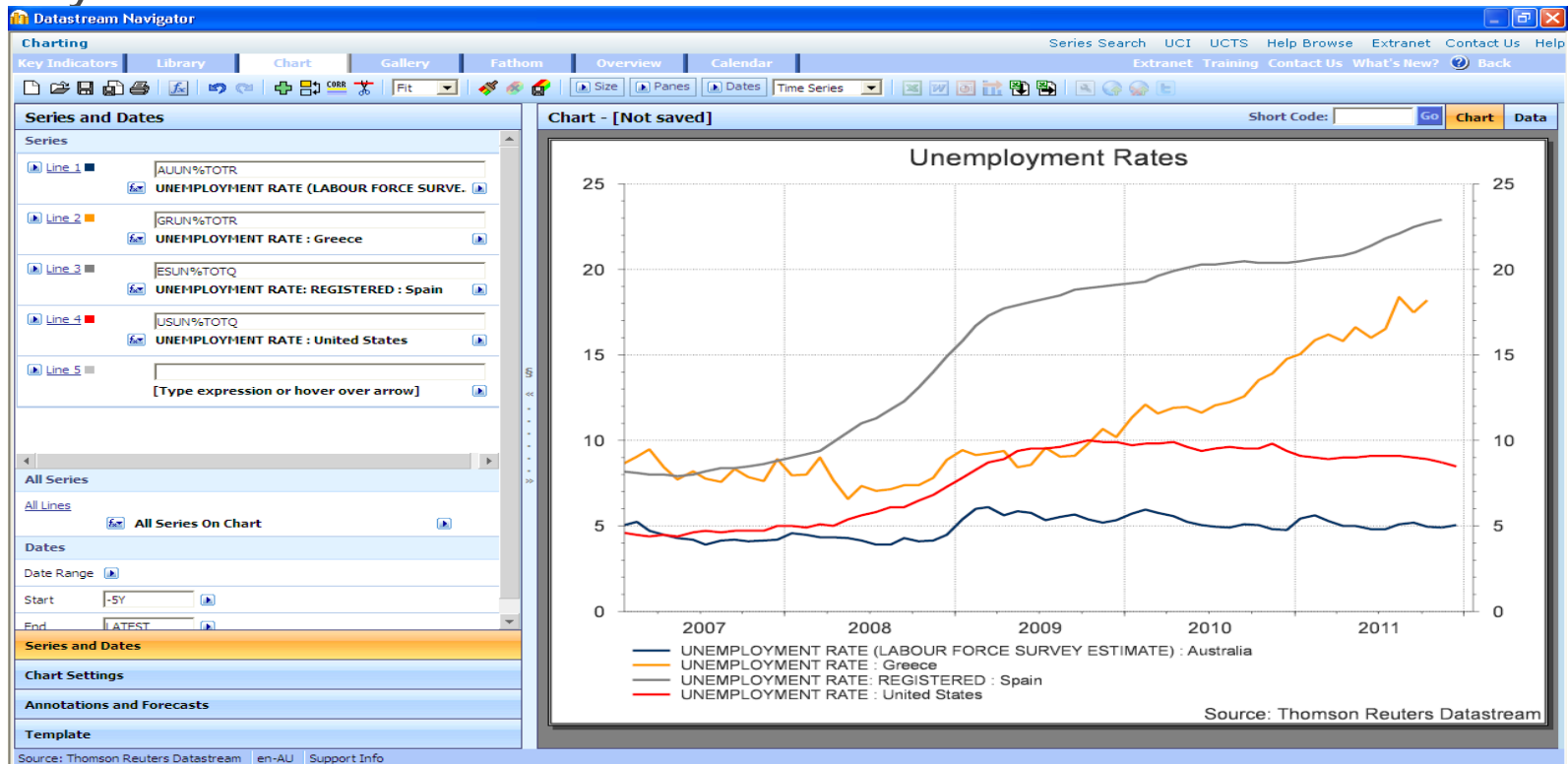


Quick access - Key Indicators and Library



Charting Exercise 1

- Create a chart to compare the unemployment rates for Australia, Greece, US and Spain for the last 5 years.



Charting Exercise 2

- **Bar chart** - library-Datastream-Charting features-Stacked or Static Bar
- **Scatter chart** - library-Datastream-Charting features- Static or Time series Scatter
- **Quick Correlation – Lead & Lag – best fit**
- **Correlation and expressions**

Datastream Extranet

Datastream Advance

File Edit View Tools Help

Data Category

- Datastream series
- Equities
- Equity indices
- Unit trusts

Enter Series

Datatype: Price (Adjusted - Defau

Search... GO

Home Training Pr

DATASTREAM

1/8/E/S FORECAST DOW JONES STOXX 50

PRODUCTS AND DATA

PRODUCT INFORMATION

Datastream Desktop (Advance & AFO)

Datastream For Office (DFO)

Navigation

Company Fundamentals

Advance 4.0 SP5 and above

- [Balance Sheet](#) Displays key balance sheet items from DSWindows 190B report.
- [Cash Flow](#) Displays the key cash items from Worldscope 190C report.
- [Profile, Product & Geographical Analysis](#) Displays key profile, product & geographical information. Replicates the DSWindows 190E and 190F reports.
- [Profit & Loss](#) Displays key income statement items from the DSWindows 190A report.
- [Fundamentals Ratios](#) Displays key ratio items from Worldscope 190D report.
- [Worldscope Interims](#) Displays Worldscope interim and year-end reports, broken down into Income Statement and Balance Sheet Ratios.
- [User Defined Worldscope Report](#) Allows user defined Worldscope items to be included in a report. DSWindows 190Y User created for...

Equities

Advance 4.0 SP5 and above

- [ESG ASSET4 - Sector/Industry analysis](#) Template allowing users to perform sector/industry defined selection of ESG datatypes. Using either the 10 TRBC economic sectors or the 10 TRBC economic sectors...

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- Japanese PDF issue
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- DFO Samplesheets
- AFO Samplesheets**
- TRSL & AFO Samples
- DDL Samplesheets
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 - Getting Started with Datastream Direct: Overview
 - Getting Started with Datastream Charting
 - Datastream Charting: More charts and analysis tools
 - Datastream Charting: Working with Datastream Charts
 - Datastream Charting: Installing the Datastream Charting Add-In
 - Datastream Charting: Using Datastream Charting to Analyze Economic Data
 - Datastream Charting: Customizing Charts
 - Datastream Charting: Working with Annotations

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<https://training.thomsonreuters.com/cert/datastream/>

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- Get your result instantly



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Thomson Reuters Support (Australia)

- Phone: 1800 634 264
 - Email: Go to Datastream menu → Contact Us
- English is supported 24/5

The screenshot shows the Microsoft Excel interface with the Thomson Reuters and Datastream tabs. The Datastream tab is active, showing a ribbon with various tools. A tooltip is displayed over the 'Contact Us' button, providing the following text:

Contact Us
Use to contact us online for help with your questions.
 AdvanceOffice.xlam
Press F1 for more help.



REUTERS/Denis Balibouse

Thank you for attending !