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## Mergent Online Instructions

Financial information for publicly traded companies is available to the public and can be found on a domestic company's 10-K annual report on the company's investor relations page (e.g., [Apple Earnings Releases and 10-K Annual Reports](#)) or the U.S. Securities and Exchange Commission (SEC) site under [Filings and Forms](#) and on many other financial sites including [Yahoo! Finance](#).

**Mergent Online** is a financial industry tool available to SNHU students for free. Review the [Mergent Online video demonstration](#) (7:57). **Note regarding video:** Access the SNHU Shapiro Library under Quick Links on your course home page.

### To Find a Publicly Traded Company

- On your course home page, select the **SNHU Shapiro Library** link under Quick Links.
- Select **A-Z Database List** under Quick Links on the library home page. Enter "Mergent Online" in the Search for Databases field, click **GO**, and then click on **Mergent Online** in the results.
- This is the direct link: [Mergent Online](#).
- Enter a company name in the "Company Search - Enter symbol or Company Name" field in the first section at the top, left-hand portion of the screen. Wait one moment for a drop-down menu to appear.
- If it is a publicly traded company (meaning its stock trades on an exchange where you can buy and sell shares), it will appear in the drop-down list, and you will see the company stock ticker symbol and name.
- For details, click on the company name in the list. Confirm this is the company you intended to search for by reading the business summary.
- Review the information in the blue box at the top of the page and make note of the company's assigned **sector** and **industry**.

### To Find Historical Stock Prices

- Select the **Equity Pricing** tab.
- The time period defaults to three years.
- Click on **Report** above the Controls box.
- Once you see "Historical Pricing," choose **Download** in the top right of the screen.
- Save the Excel file to your computer.
- Use the **close price** to calculate the percent increase or decrease in the stock price over the seven-weekday or three-year period ("rate of return" in rubric).
- For example, Apple's stock price on 8/19/16 closed at \$109.36. Seven weekdays earlier, on 8/11/16, it closed at \$107.93. If you had bought 100 shares of Apple stock on 8/11/16 at \$107.93 and sold it on 8/19/16 at \$109.36, you would have earned \$143 before taxes, which is a 1.32% rate of return. The calculation is  $(109.36-107.93)/107.93 \times 100$ , which equals 1.32%.
- Apple's stock price closed on 8/19/2013 at \$72.53. The three-year rate of return is 50.77%.

### To Download Financial Statement Data

- Select the **Company Financials** tab to retrieve financial statement data.
- Balance sheet data will appear, and it defaults to annual.
- Five years' worth of data will appear, and you can **change this to three years** by selecting that option to the right of Annuals/Balance Sheet above the balance sheet data.

- Choose **Refresh** at the end of the next row.
- Choose **Download** in the top right of the screen.
- **Save** the Excel file to your computer.
- Change balance sheet to income statement and then cash flow to get your other financial statements.

#### To Find a Competitor

- Click on the **Competitors** tab.
- Select **Public Global** to the right of “Competitor” at the top of the list of companies.
- Click on “Company Name” to review the **business summary** and confirm this is the company you are interested in.
- Review **sector** and **industry** listed at the top, and determine if you want to use this competitor for your competitive analysis.

#### To Find Industry Data

- Click on the **Competitors** tab.
- Select **Public Global** to the right of “Competitor” at the top of the list of companies.
- Choose at least five competitors.
- Click on each company name to review the **business summary** and confirm this is the company you are interested in.
- Review **sector** and **industry** listed at the top, and determine if you want to use this competitor for your industry analysis.
- Determine what financial indicators you would like to compare, and collect the needed data from the company financial statements for your ratio or free cash flow (FCF) calculations.
- Average your calculated results to get an industry average (e.g., add the five company FCFs together and then divide by five).

Post any questions to your course’s General Questions discussion.



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