

A University Expands Its Perspectives with Aftermarket Research

THE CLIENT:

A U.S.-based university

USERS:

The head librarian

Many students and faculty members are attracted to universities that are known for introducing new courses and innovative teaching methods that provide real-world learning experiences. As data-driven analysis continues to be more sophisticated across disciplines, it is not surprising that offering access to the same information and tools used by professionals in the workplace is playing an increasingly important role in giving universities a competitive edge.

The head librarian at this U.S.-based university was aware of today's realities and recognized the importance of providing students with learning experiences that would prepare them for their jobs of choice. For finance students, she saw the need to offer data used by global finance professionals with analytical tools to enhance their understanding of important financial concepts, trends and workflows. The school was already a subscriber to several S&P Global Market Intelligence ("Market Intelligence") services, and the head librarian was interested in increasing the university's offering to expand the perspectives of the professors, academic researchers and students.



Pain Points

The head librarian wanted to increase the university's competitive advantage by adding state-of-the-art capabilities for finance students to learn as much as possible through deep analysis of companies and industries. In particular, she wanted to complement her current Market Intelligence subscription of standardized global company fundamental and market data with:

- **Extensive information** from a wide range of well-known brokerage firms, available in one easy-to-access location.
- **Strong search capabilities** to quickly zero in on companies and industries of interest.
- **Thumbnail views of research reports** to assess the content before downloading.
- **Side-by-side comparisons of reports** to easily see differences in analyst reviews.

The head librarian contacted her Market Intelligence relationship manager to discuss what was available.

The Solution

Market Intelligence specialists described the Aftermarket Research collection, plus a wide range of data, analytical tools, news and research that is automatically available on the S&P Capital IQ Pro desktop. This information, coupled with the news that the company had won WatersTechnology's award for Best Research Provider for three consecutive years,¹ showed that the university would have data of distinction, compared to its competitors. Since most students used the university's website, they would be able to access the desktop via a single sign-on capability on the website. This add-on to the existing subscription would enable students to:

Universities need to stand out from the crowd more than ever before to serve the needs of discerning students looking for real-life work experiences. It has become essential to provide access to top-quality data and analytical tools.



See what the market thinks about industries and companies

The **Aftermarket Research** collection features 35 million reports from 1,800+ global investment research providers,² including small- to middle-market brokers and top-ranked investment banks, such as Citi, Credit Suisse, Barclays, UBS, J.P. Morgan, HSBC and Deutsche Bank. The offering helps users gain essential perspectives on the companies, sectors and industries they track.

Users can search on numerous fields, including:

- Ticker(s)/Company name
- Analyst
- Keywords
- Date range
- Contributors
- Categories
- Asset class

¹ "Best research provider—S&P Global Market Intelligence", 2022: www.waterstechnology.com/awards-rankings/7947476/imd-ird-awards-2022-best-research-provider-sp-global-market-intelligence; 2021: www.spglobal.com/marketintelligence/en/media-center/press-release/sp-global-market-intelligence-awarded-best-research-provider-and-best-enterprise-data-management-initiative-from-waterstechnology; 2020: www.waterstechnology.com/data-management/7686851/imd-ird-awards-2020-best-research-provider-sp-global-market-intelligence.

² Data as of January 2022.

- Industries
- Geography
- Languages
- Page length

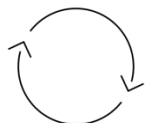
Searches can be saved for quick retrieval, and users can learn about a report of interest before downloading, using precision search capabilities to evaluate:

- **Relevancy:** Locate relevant reports, ranked according to keyword search relevancy.
- **Table of Contents:** View a page-by-page summary of sections and tables in each report.
- **Document Thumbnails:** Preview the contents and layout of a report before downloading.
- **Keywords in Context:** Discover the context for a specific keyword or phrase of interest. Keyword searches also support synonyms and acronyms with keyword snippets and visualizations to quickly surface relevant research reports.
- **Multi-Preview Options:** Compare and contrast multiple reports using keyword mentions, table of contents and report synopsis.

In addition, users can:

- **Organize** downloads by using batch-preview print and download functions.
- **Monitor** the information of most interest by creating saved searches and email alerts.

Use **mobile apps** for smartphones and iPads to access the latest research and stay connected to markets and companies.



Round out stories with complementary datasets

Transactions provides profiles of approximately 2 million deals captured across the globe. Some of the fields that may be available include a synopsis that lists deal size, company participants, advisor coverage and associated filings with up to 10 years of history.

Transcripts review data on earnings, M&A activity, company conference calls and special calls.

Key Developments provides information on 1+ million developments, based on 160+ standardized topics. This includes 20,000+ news sources, such as press releases and regulatory filings.

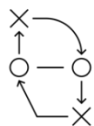


Save time with productivity enhancing tools

A smart screener enables users to instantly find information across companies, news, documents, research, transcripts and investor presentations. A document viewer incorporates AI-based searches to speed up the discovery process for text-based insights across filings and transcripts.

Sophisticated “Find Buyers” and “Targeting” tools enable users to quickly search and rank potential M&A or private placement investors based on detailed criteria.

“Quick Comps” helps identify the ideal universe for trading comps and “Competitors” helps view peer groups for particular companies.



Utilize formulas and pre-built models

A suite of office tools, including an ExcelAdd-In, seamlessly powers proprietary models and streamlines presentations. Users can access a library of hundreds of ready-to-use models and templates, integrate data from Excel to PowerPoint or Word with fewer errors and refresh formulas in Excel with just one click.

Key Benefits

The value of the Aftermarket Research dataset was evident to the head librarian, university faculty and professors. Additional capabilities available through access to the S&P Capital IQ Pro platform enabled professors to differentiate their coursework to:

- **Quickly gain access to millions of analyst reports from well-known brokerage houses and market research providers** to obtain in-depth company and industry analyses.
- **Preview reports** before downloading to understand the content and layout.
- **Compare reports** with a unique side-by-side preview capability.
- **Conduct comprehensive valuations** by easily reviewing income statements, balance sheets, cash flows and ratios.
- **Follow event activity for specific companies**, including dates, times and contact information for investor relations leads by leveraging corporate transcripts.
- **Quickly identify a universe of comparable trading multiples** using “Quick Comps” and “Competitors” to view peer groups for companies.
- **Leverage an extensive selection of prebuilt model templates, reports and charts**, including trading and deal comps.

[Click here](#) to explore some of the datasets mentioned in this Case Study.

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