Chapter 5
Charts

Charts

Charts not only make your information easier to read and understand, but they can also help you identify trends, make comparisons, and clarify relationships that may not otherwise be apparent.

Standard & Poor's Research Insight provides you with an extensive collection of pre-defined charts to help you bring your financial analysis to life. This collection includes the most commonly used charts for the COMPUSTAT (Global) databases. We've made it easy for you to modify these charts, changing the chart style, colors, and axis labels. You can also add titles, change fonts, and customize the legend.

Research Insight also gives you the flexibility to create your own charts. With just a few clicks of the mouse, you can select the data you want to display and design a chart to your own unique specifications.

This chapter shows you how to:

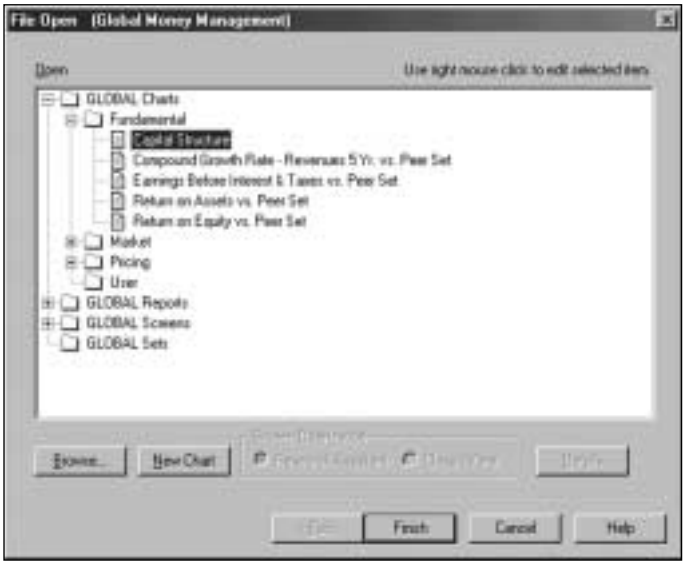
- Use pre-defined charts
- Create your own charts
- Modify chart criteria

Using Pre-defined Charts

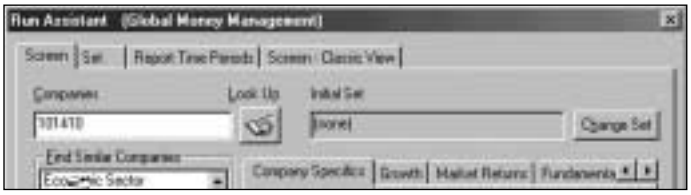
Research Insight gives you the flexibility to evaluate your target companies using a variety of pre-defined charts. For example, if you wanted to look at the capital structure of ABB-Asea Brown Boveri Group, you would:

Begin from the Research Insight desktop.

1. Click the (**Open Chart**) button.
   You will see the File Open window.

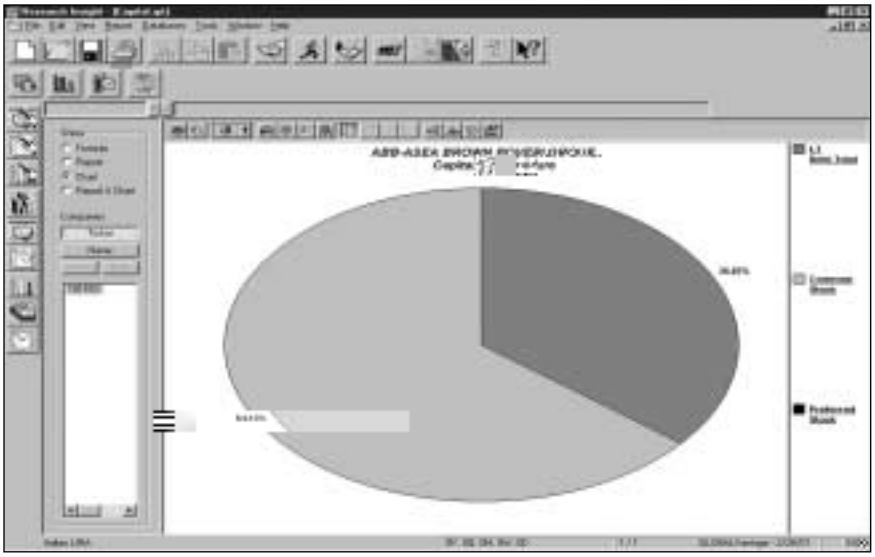


2. From the **Fundamental** folder select **Capital Structure**.
3. Click **Finish**.
   You will see the Run Assistant window.



4. Enter the GVKEY for ABB-Asea Brown Boveri Group (**101410**) in the **Companies** field.
5. Click **OK**.

A Capital Structure chart will appear for the company.



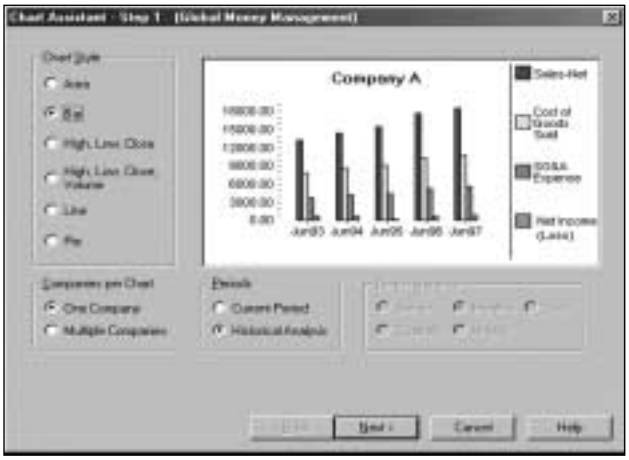
Hint: To view the underlying formulas for the corresponding report, select the **Formula** radio button in the Show area. To view the corresponding report for this chart, click the **Report** radio button. You can also view the report and chart at the same time by clicking the **Report & Chart** radio button. If you want to open another chart, click the **Open Chart** icon on the desktop. Click the (**Run**) button to open the Run Assistant window where you can change your initial set, or modify your base set and criteria.

Creating Your Own Charts

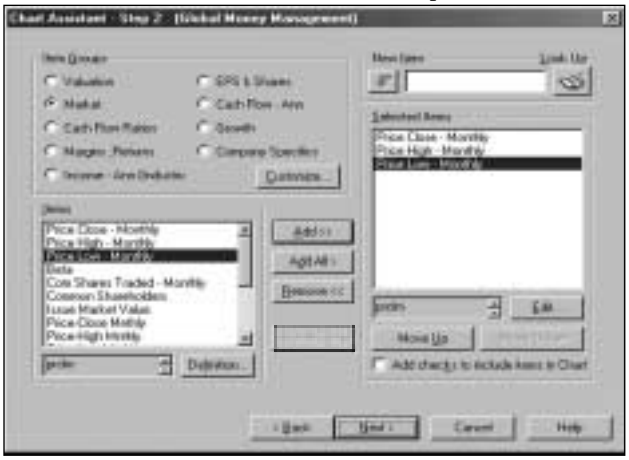
The Chart Assistant wizard in Research Insight allows you to create your own custom charts quickly and easily. All you have to do is select the type of chart and the companies you want to appear in your chart, and Research Insight will retrieve and display the information you requested. For example, if you wanted to create a chart that would display the high, low and close prices for Telecom Argentina and Telefonica de Argentina SA for the past six months, you would:

Begin from the Research Insight desktop:

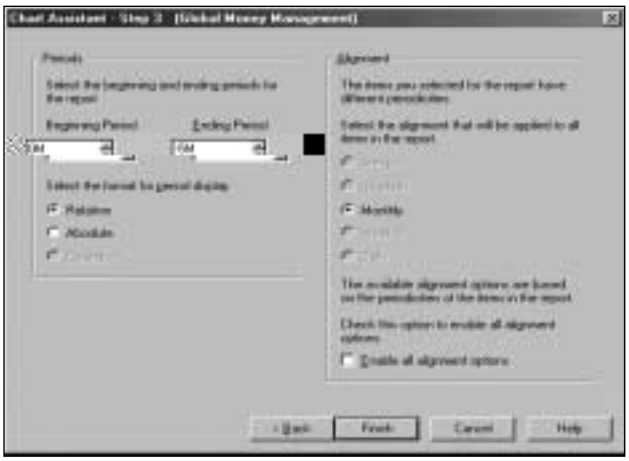
1. Click the (**Chart Assistant**) button.
   You will see the Chart Assistant window.



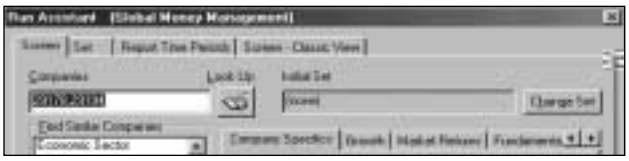
2. Click the **Bar** radio button in the Chart Style area.
3. Click the **One Company** radio button in the Companies per Chart area.
4. Click the **Historical Analysis** radio button in the Periods area, and click **Next**.
   You will see the Chart Assistant - Step 2 window.



5. Click the **Market** radio button, select the **Price Close - Monthly** item and click **Add**.
6. Select the **Price High - Monthly** item and click **Add**.
7. Select the **Price Low - Monthly** item and click **Add**.
8. Click **Next**.
   You will see the Chart Assistant - Step 3 window.

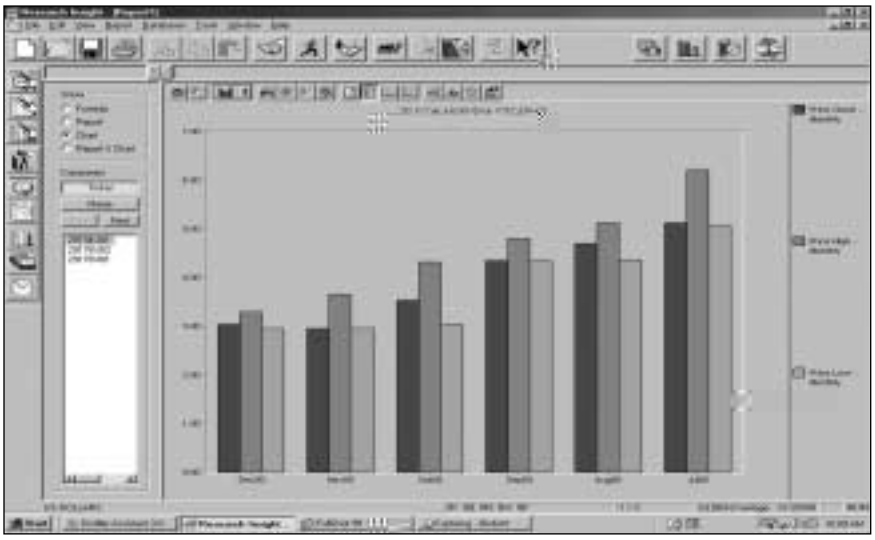


9. Enter **0M** in the **Beginning Period** field (to signify the current month), and **-5M** in the **Ending Period** field (to signify 5 prior months). Notice that the Alignment area shows that the data will be aligned to monthly.
10. Click **Finish**.
    You will see the Run Assistant window.

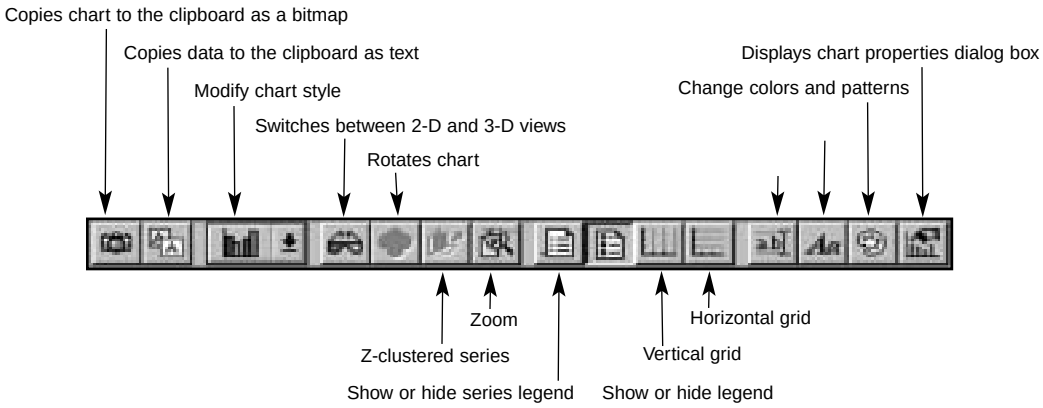


11. In the Run Assistant dialog box, enter the GVKEYs for your target companies in the **Companies** field (**29194,29178**), separating each key with a comma.
12. Click **OK**.

Your custom chart will appear on the screen.



Hint: To view this chart for the other companies, click the GVKEY of the company located in the Companies area. Click the **Name** button to display the list of companies by company name. To save the chart, select **Save As** from the **File** menu. Enter a name in the **File Name** field, and click **Save**. To print the chart, select **Print** from the **File** menu. You can also click the (**ReRun**) button to access the Chart Assistant where you can modify your chart parameters.

Modifying Chart Attributes

You can modify your chart attributes by clicking on the chart toolbar located at the top of the chart. Below is a description of each button on the chart toolbar.