INTRODUCTION

Datastream is an extensive database of historical financial numerical data. It contains over 40 years of data. Datastream contains quantitative data for most companies (equities) quoted on any stock exchange. In addition, it contains a lot of other data including: equity indices, unit trusts, bonds, economics, exchange rates, interest rates and commodities.

Data is provided by a number of organizations including: Worldscope, International Monetary Fund (IMF), Organization for Economic Cooperation and Development (OECD) and national government sources. Datastream offers a wide choice of charting, reporting and downloading options.

Datastream does not contain qualitative data or data on private companies.

FEATURES

• Results easily downloadable to Excel, Word, or PowerPoint
• Simplified search for data series and datatypes through Navigator
• Interactive Charting and Help Browse tools in Navigator for data series mnemonics search
• Excel Add-in Datastream-AFO (Advance for Office) for running complex searches directly in Excel

ACCESS

Datastream is only available on 1 PC located in Database Center at the Main Library. To access Datastream you will need to obtain password to unlock the computer. The password can be retrieved at Circulation Counter or Librarian in charge for datastream. START DSgate and configure the connection by right-click the small yellow “lightening bolt” in the bottom right corner, then click Connect Now.

*The PC operate on a first-come, first-served basis and kindly not access any sites or do work editing on this PC.

THIS GUIDE

This guide is intended to get you started with using Datastream. In the first section, How to use Datastream Advance and the last part is How to use the Datastream Advance for Office (Excel Add-on).
SEARCHING DATASTREAM ADVANCE – CREATING A REQUEST

Datstream Request page, shown below, is divided into areas where you set your selections, run searches, and view results. The output results come in report, graph, or data format depending on your preference and type of values. The key feature for data searching is the Datstream Navigator. Datstream provides two types of Navigator:

- Navigator for data series searches, e.g. for finding specific securities such as equities, indices etc. and
- Datatype Navigator for finding specific financial data items, e.g. prices, market values etc.

Create search request in five steps:

Step 1: In the Data Category window, select a category from the list.

Step 2: Select data series using Data Series Navigator: click the category or hold your mouse over the selected category to display a direct link to Navigator (Criteria Search), or click the Search button next to the Enter Series box in the Search window.

Step 3: In the Analysis window, select the request type for your data series, e.g. preformatted report, chart, table etc.

Step 4: In the Settings window, refine your selections by setting dates, frequency, datatype, and currency as applicable. Use Datatype Navigator for selecting financial or economic data items.

Step 5: Click the Run Now button and view results in the Output window. Save or download results in Excel, Word, or PowerPoint by selecting Tools > Transfer option from the top menu bar.
SELECTING A CATEGORY AND CHOOSING DATA SERIES

Datastream series is a particular set of financial data over time, e.g. equities, bonds, indices etc. All Datastream series are grouped into 18 data categories accessible in the Data Category window.

- From the list in the Data Category window, select a category. By selecting a category, you gain access to all financial information for each data series which constitute a category. For examples, in Equities, individual public companies represent the data series.
- Select a data series pertaining to the category by any of the following methods:

USING NAVIGATOR:
For quick access to the Navigator click or mouse over the selected data category to display quick links to series search options as shown on the right. To access Navigator, click on the Criteria Search link.

Navigator Quick Search - enter a keyword (name of the series, e.g. company name, index name etc.) in the Enter Series text box and click search button. On the results page, click the Name, or DS Mnemonic, or DS code to select a data series.

Navigator Drill Search - hover your cursor to the any data category, small pop-up window will appear and click to Explorer. In a new window, you can drill-down to the data series you are looking for.

NOTE: The Navigator Drill search is available only with selected data categories.

Other methods for series search:
- Mnemonic search - click the Expert entry check box, and enter DS mnemonic in the Enter Series box, e.g. U:GE. The series mnemonic appears in the Name box.
- Using Recent Series Search - click on the arrow in the Enter Series box to open a drop-down list and select data series from your previous requests. The Expert check box should be checked if you select a mnemonic.

Selecting Request Type (Analysis Window)
In the Analysis window, shown on the right, select the request type, e.g. report, chart, time series table etc. The menu of output reports vary by data category and series selection.

Single Series – Overview - a menu of preformatted reports available for most of the data categories: equity, commodity, warrant, trust, and bonds; also includes I/B/E/S forecast and valuation reports.

Multiple Series / Flexible Chart - a menu of templates which lets you create comparative data reports and built charts for multiple series across different data categories e.g. compare a company’s performance against an index.

Single Series – Data - a tool which lets you create time series, static, or company accounts data reports in spreadsheet format. You can run historical time series reports, such as company stock prices for the period of up-to past 20 years. Data availability varies by series. All Data reports can be exported directly to Excel.
REFINING REQUEST

In the Settings window, you can refine your request by selecting frequency for time series requests, dates, datatype, and currency as applicable. **NOTE:** The contents of the Settings vary by data series and request type.

**Settings:** When the Settings button is enabled, you can refine your search for charts and data requests by selecting additional criteria from the available options.

- For Time Series requests such as stock prices, click Settings to select frequency: daily, weekly, monthly, quarterly, or yearly
- For Static Data, click Settings to select the datatype

**Dates:** Select time period by using one of the following options:

- Select relative dates (-1Y, -10Y, -6M etc.) displayed in the Settings window
- Click the time period button to select a fixed date, or a date range, or a relative date not available for quick selection, e.g. -12Y.

**Currency:** from the drop-down list in the Currency box, select the applicable currency

**Datatype:** Datatype defines the type of data, e.g. prices, beta, volume etc. The default datatype for equities is Price (Adjusted). Use Datatype Navigator to select datatypes for your request. To open the Datatype Navigator, click the Search button next to the Datatype box located in the Search window.

<table>
<thead>
<tr>
<th>Datatype Search</th>
<th>Filter/Search</th>
<th>Reset</th>
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</table>

On the Datatype Search page, shown on the right, datatypes are grouped by types and sources. On the bar below the search text boxes, you can select a type of data, e.g. Static, Time Series, etc. In the window on the left, you can select a source of datatype such as Key Datatypes, or MSCI, or Datastream etc. To broaden your search, select All in both or either category. Use the Find box to search for data item as follows:

1. Enter keyword in the Find > (Name) > (Contains) text box. Click Filter/Search.
2. Click on the mnemonic link from the list of matching entries to add a datatype to your request.

RUNNING REQUESTS AND OBTAINING RESULTS

Click the **RUN NOW!** button located in the Settings window. Your search results: graphs, reports, or data will open in the Output window. *(see page 5)*
Saving and exporting results: Click the Excel icon from the top icon bar to export results to Excel. To save results in Excel, Word, or PowerPoint, from the top menu, select Tools>Transfer>Excel (or Word or Powerpoint)

DATASTREAM ADVANCE FOR OFFICE (EXCEL ADD-ON)

For more complex situations, such as extracting lots of datatypes for a single company (such as total assets, total sales, total liabilities etc.) over a period of time or if you want to find closing prices for lots of equity indices you would probably be best advised to use Datastream Advance for Office (also known as the Excel Add-on). This feature is available on both Datastream PCs. A screenshot of the interface is given on page 6.

The basic procedure for submitting a Datastream Advance for Office request as below:

**Basic Procedure**

1. Create a Local List (Optional)
   Use Datastream Advance (Tool > List Wizard) to create a list of equities etc.

2. Select Static Request or Time Series Request
   In EXCEL (Datastream Tab)

3. Select Series / List
   Select the list created in step (1) or search for series (e.g. equities category) of interest

4. Select (if applicable)
   (a) Datatype (e.g. closing price)
   (b) Start / End Date (e.g. 1986/ 2006)
   (c) Frequency (e.g. annually)
   (d) Options (e.g. transpose data)

5. Submit
FURTHER RESOURCES

Some Economics/Financial data can also be found on GMID & ISI Emerging Market. Feel free to log in to these databases through:


FURTHER HELP

If you need further help in using Datastream (or indeed any of the other library resources available) you can view the online database training schedule via library portal and join the training.

You also can contact reference librarian for any enquiries or walk in to the reference desk that available in the main library.

All information about library is available @ http://vlib.mmu.edu.my/portal/faq.php or Library Guide