# **Goizueta Business Library**

Creating Bridges to Knowledge



# **Screening Companies and Securities**

Use the Screen search template to filter companies and securities across Eikon's universe.

Type screener in the search box in the upper left corner



Start from scratch or use one of Eikon's prebuilt samples Unsaved Screen – Start from scratch and create your own custom spreadsheet

## Prebuilt Samples – Click Unsaved Screen>Sample Screens

SCREEN 2				
	Unsaved Screen V			
	Create New Screen			
	SAMPLE SCREENS			
	TR Growth Ideas			
	TR Short Ideas			
	TR US Large Growth			
	TR US Large Value			
	TR US Small Growth			
	TR US Small Value			
	TR EU Large Growth			
	TR EU Large Value			
	TR EU Small Growth			
	TR FI I Small Value			
	Import Screen			
	View and Manage all Screens			

**Universe** – start here and define the universe you want to search:

Public Companies; Private Companies; Public and Private Companies; Private Equity; Deals, Funds, Ownership Holdings, Ownership Investors, Ownership Contacts

Defaults to include Active Public Companies; you can also include inactive companies

Unsaved Screen V	₿▼
Currency: 📕 USD 🗸	
UNIVERSE Public Companies	
Include: Active, Public, Primary	Edit
Include: Indices, Lists, Portfolios, Screens, Stocks	Edit
Exclude: None	Edit
▼ QUICK FILTERS	
Country of Headquarters	Add
Country of Exchange	Add
Country of Incorporation	Add
Company Market Cap	Add
Average Daily Value Traded - 52 Weeks	Add
Add Filter	Counts

Number to right of Universe box - total number of securities in that universe

Check Counts box at the bottom to display running count of total number of companies after each filter is applied

SCREEN 2	C ∎•
Unsaved Screen V	<b>T</b>
Currency: 📕 USD 🗸	
UNIVERSE Public Companies	∕ 65.4K
Include: Active, Public, Primary	Edit The
Include: Indices, Lists, Portfolios, Screens, Stocks	Edit
Exclude: None	Edit
▼ QUICK FILTERS	
to Country of Exchange	Add
Country of Incorporation	Add
Company Market Cap	Add
Average Daily Value Traded - 52 Weeks	Add
TRBC Economic Sector Name	Add
Add Filter 🗄 🗸	Counts
Country of Headquarters Country of Headquarters	11699
United States of America	

**Quick Filters** – Most popular data items; click **Add** for filters you want to use **Add Filter** search box – type any additional filters you want to add. For example: ebitda



OR click on the **Bars** to the right of the **Add Filter** search box to search the **Data Item Library** Click **OK** in right corner of **Data Item Library** when done



At the screening template, click **Done** to the far right of added data item to add to your filters

Add Filter	🗄 🖂 Co	unts	
Total Revenue(FY0,USD)	∷≣ >=	Total Revenue	⊞ Done 🗙

To delete or edit any data items, hover your mouse over the item and edit/delete options will appear to the right



By checking the **Counts** box, a running count of total number of companies after each filter is applied

Currency: 📕 USD 🗸		
▼ UNIVERSE Public Companies ∨	65.4K	
Include: Active, Public, Primary	Edit	
Include: Indices, Lists, Portfolios, Screens, Stocks	Edit	
Exclude: None	Edit	
▼ QUICK FILTERS		
Earnings Quality Region Rank	Add	
ARM Score Change	Add	
52-week Price PCT Change	Add	
Dividend Yield, Percent, LFY	Add	
Primary Country of Risk	Add	
Add Filter 📃 🗹	Counts	
Country of Headquarters	11694	
United States of America	11694	
AND		
NAICS Industry Group Name		
Include Full-Service Restaurants	51	
Greater Than or Equal (>=)	35	
5,000,000.00 USD		

Refreshing your screen - Screens should automatically refresh each time you add, remove or change a filter Manually refresh your screen anytime by clicking the refresh icon



### **Creating a Report Template**

You can customize the data items you want to display in your report

Use the **Report** ribbon at the top of the page to **Add Columns**, **Group** and **Rank** companies, **name** and **save** templates, and more.



#### **Saving Your Screens**

Click on the Save icon to name and save your search



**Exporting Results in Excel** Click on the **Excel** icon on the top, far right of the screen



## **Additional Search Tips**

#### **Screen on Headquarters City**

The default company headquarters is country.

Type city in the Add filter search box and click City of Headquarters



Type your city in the box and click **Done** 

City of Headquarters 🗄 Contains 🗸 atlanta Done 🗙

Use Eikon's Equity Screener Guide to learn more about screening

• Search for the guide within Eikon



• Click on the Equity Screener Guide PDF in the Search Tips section of the GBL Thomson Reuters Eikon database page