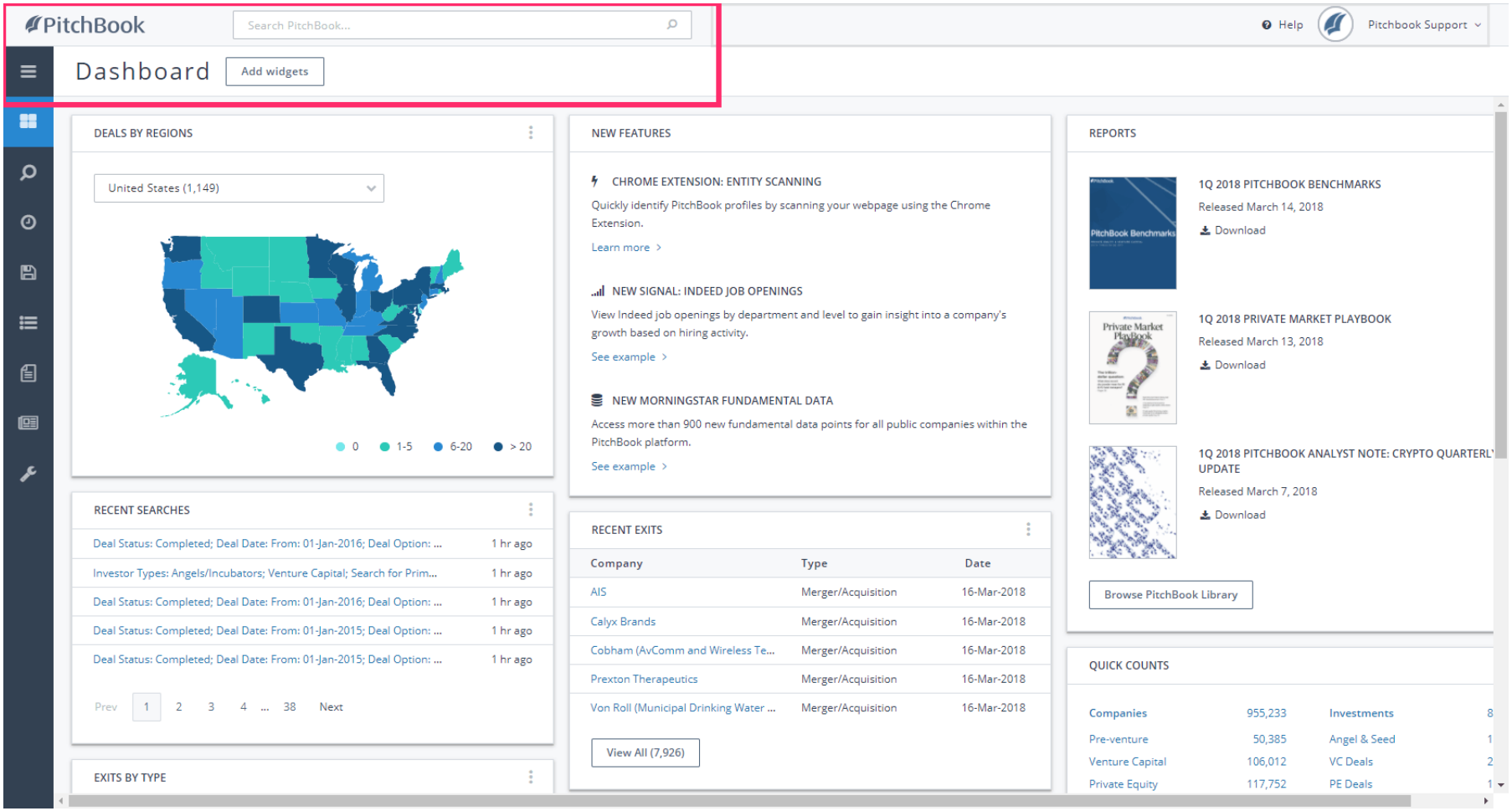
Viewing a Company Profile

PitchBook Data

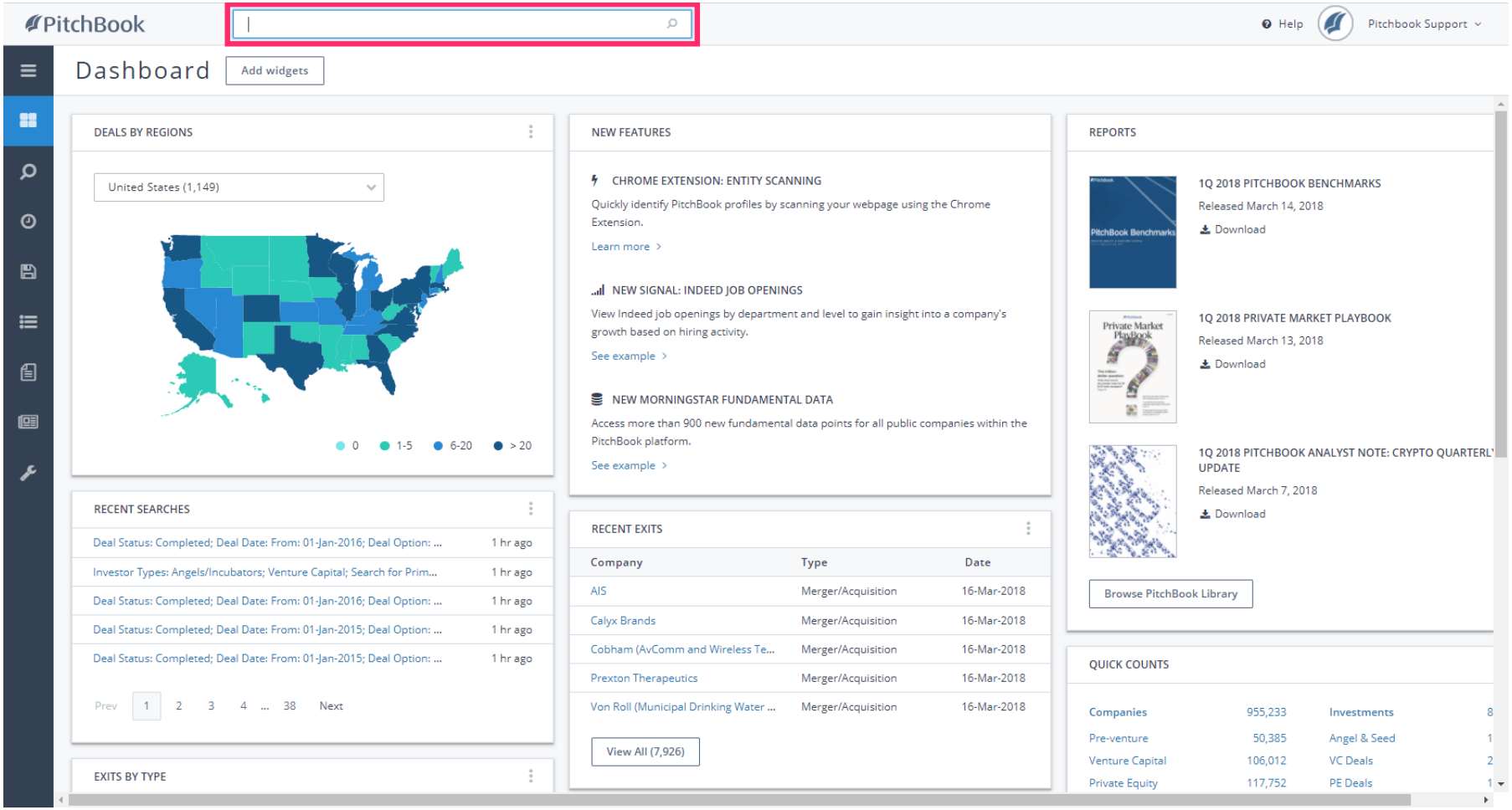
A profile contains all of the information that PitchBook has researched and obtained for that particular entity. In this tutorial, we'll be taking an in-depth look at the profile of a Company.



Viewing a Company Profile

PitchBook Data

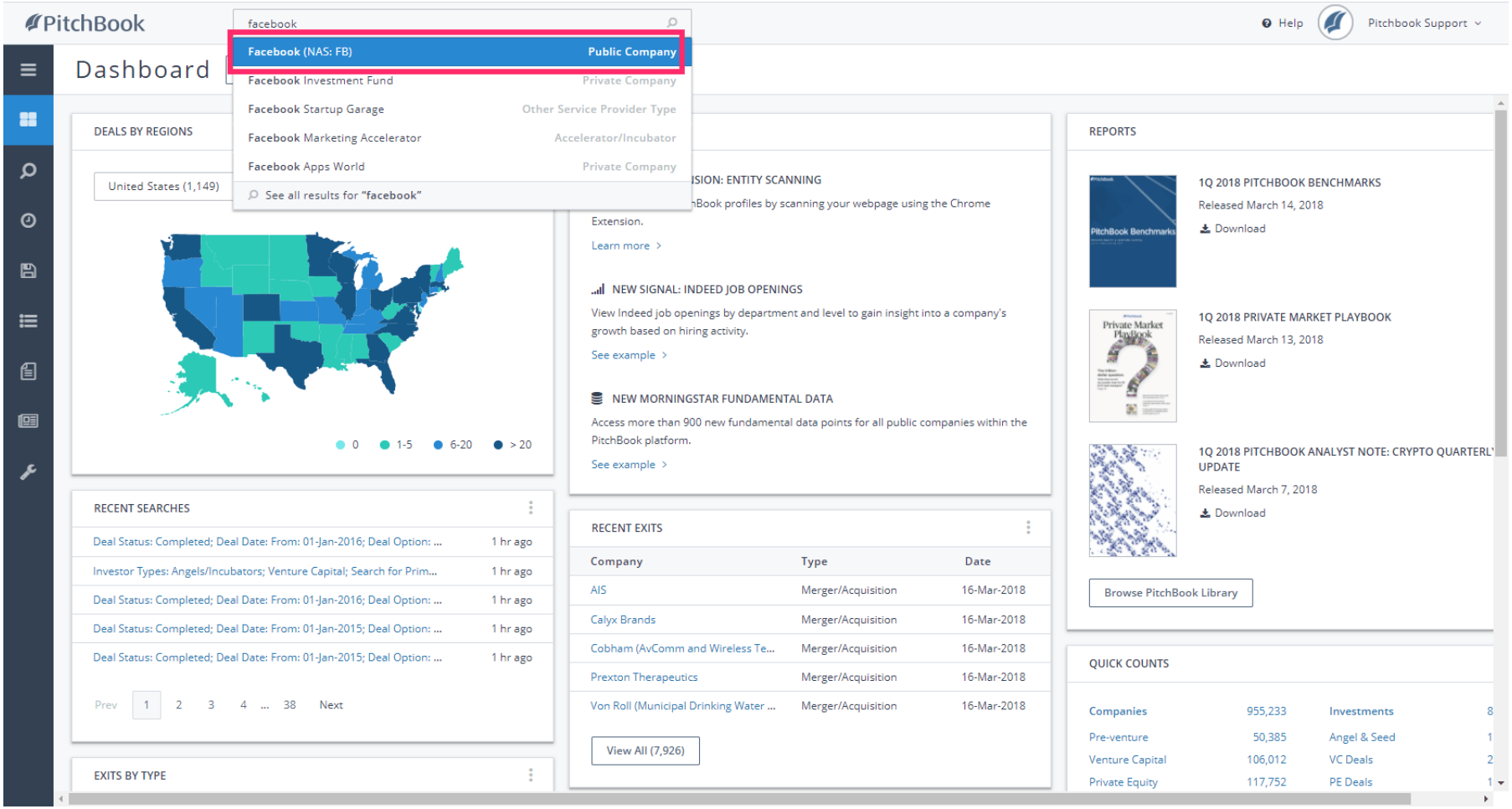
First, let's find a company within the platform that is categorized as a Company. Click Search PitchBook...



Viewing a Company Profile

PitchBook Data

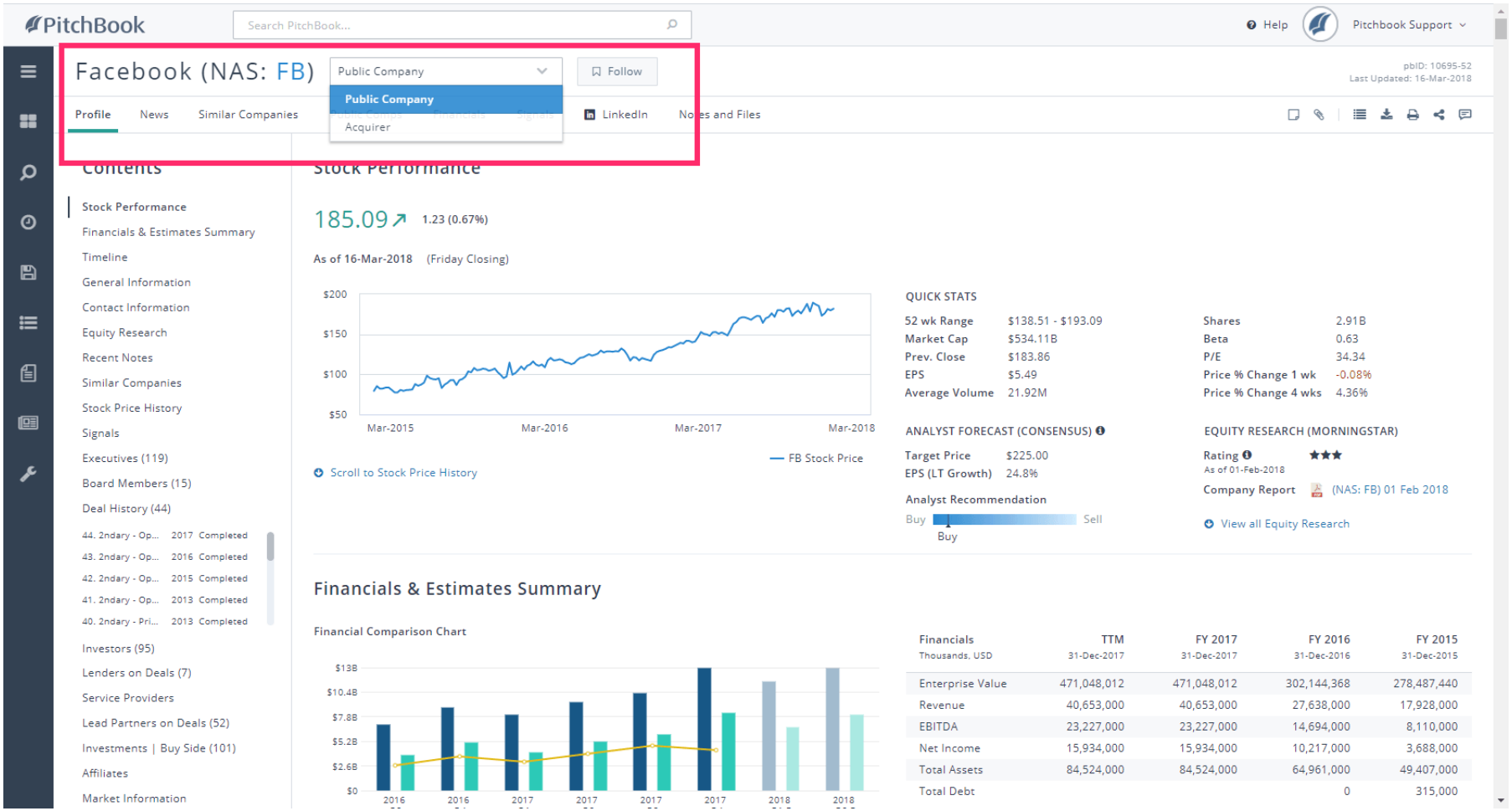
Click Facebook (NAS:FB)



Viewing a Company Profile

PitchBook Data

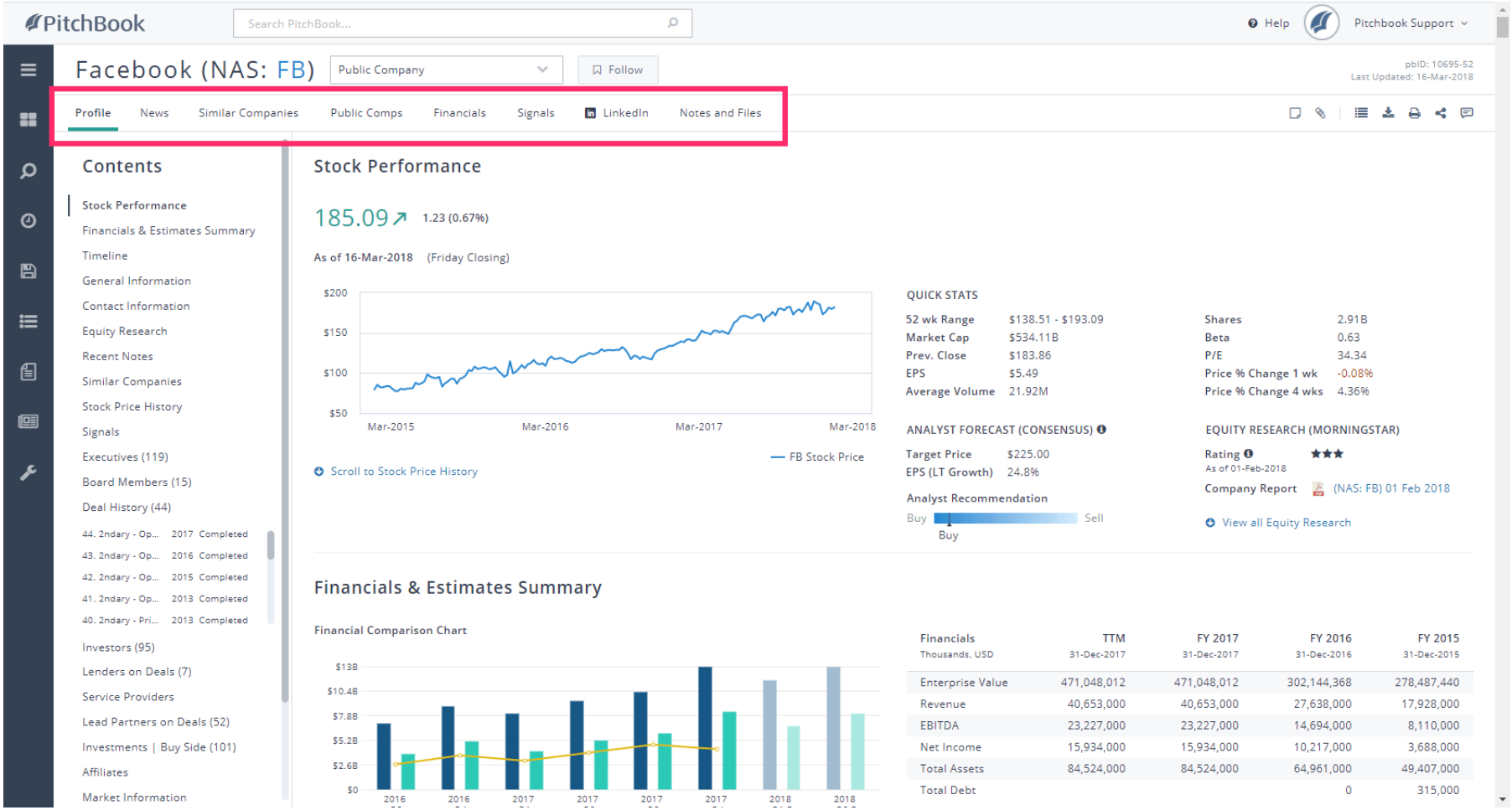
The drop-down menu allows us to switch between the different profile types. Right now, we're looking at Facebook as a Public Company, but they also have an Investor profile since they're also considered a Corporate Acquirer.



Viewing a Company Profile

PitchBook Data

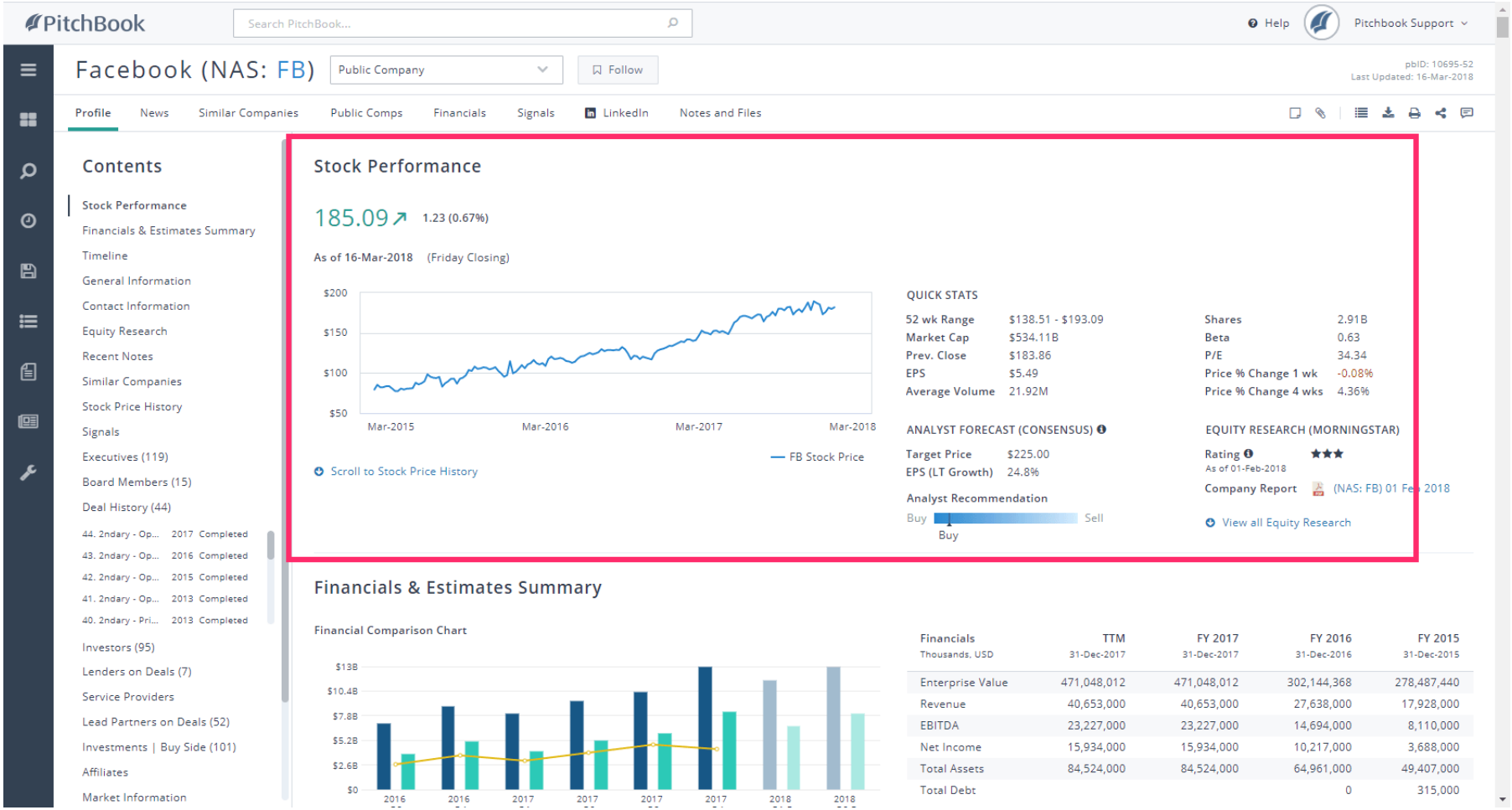
By default, we'll land on the Profile tab. It contains various data sets that we can navigate through using the Contents sidebar. The other tabs near the top expand on those data sets and let us interact with it in different ways.



Viewing a Company Profile

PitchBook Data

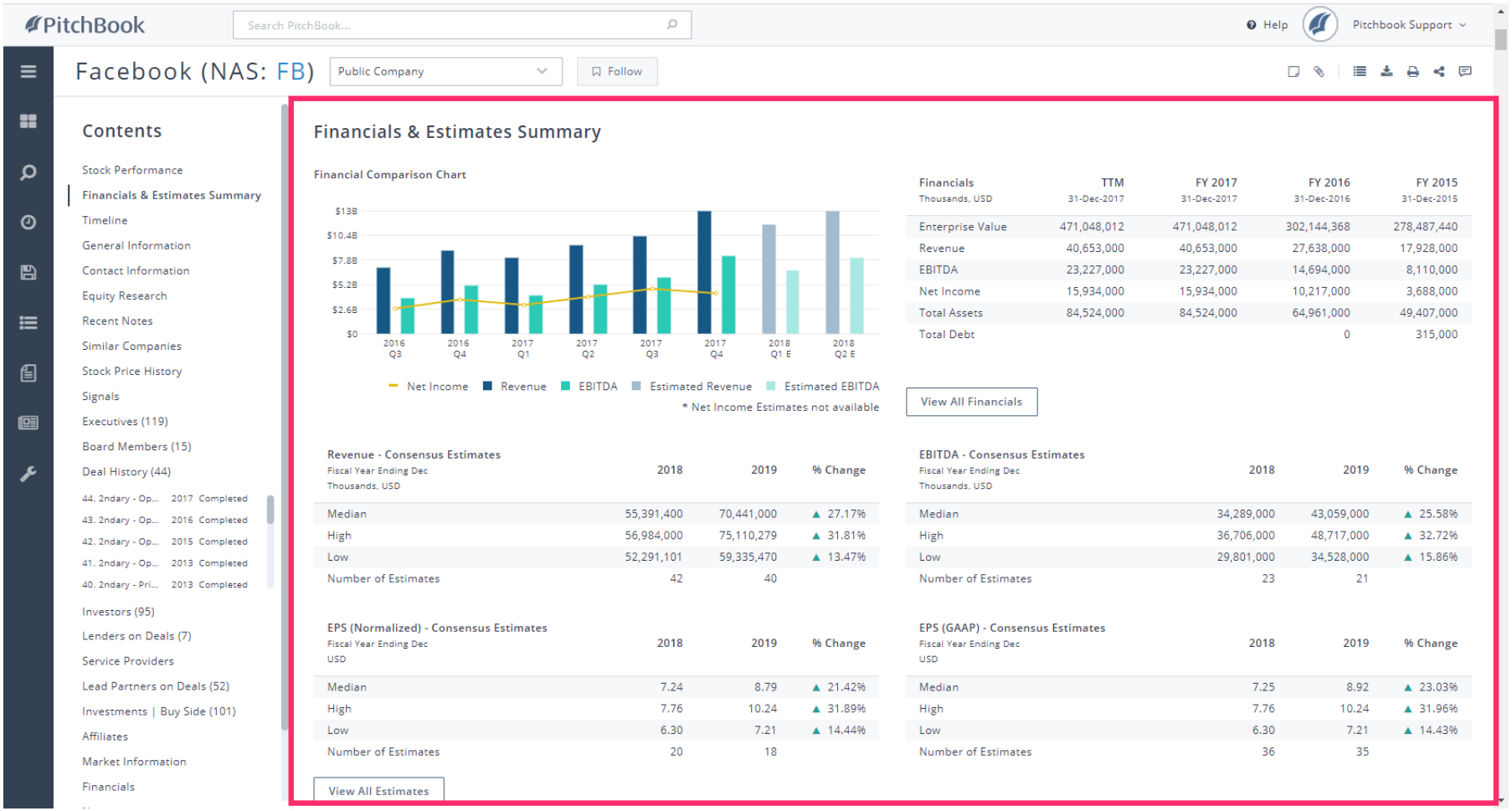
The Stock Performance section provides a quick overview on the performance of the company's stock. Stats include Market Cap, EPS, Average Volume, Shares and Beta. There's also a chart that shows the historical closing price of the stock over time.



Viewing a Company Profile

PitchBook Data

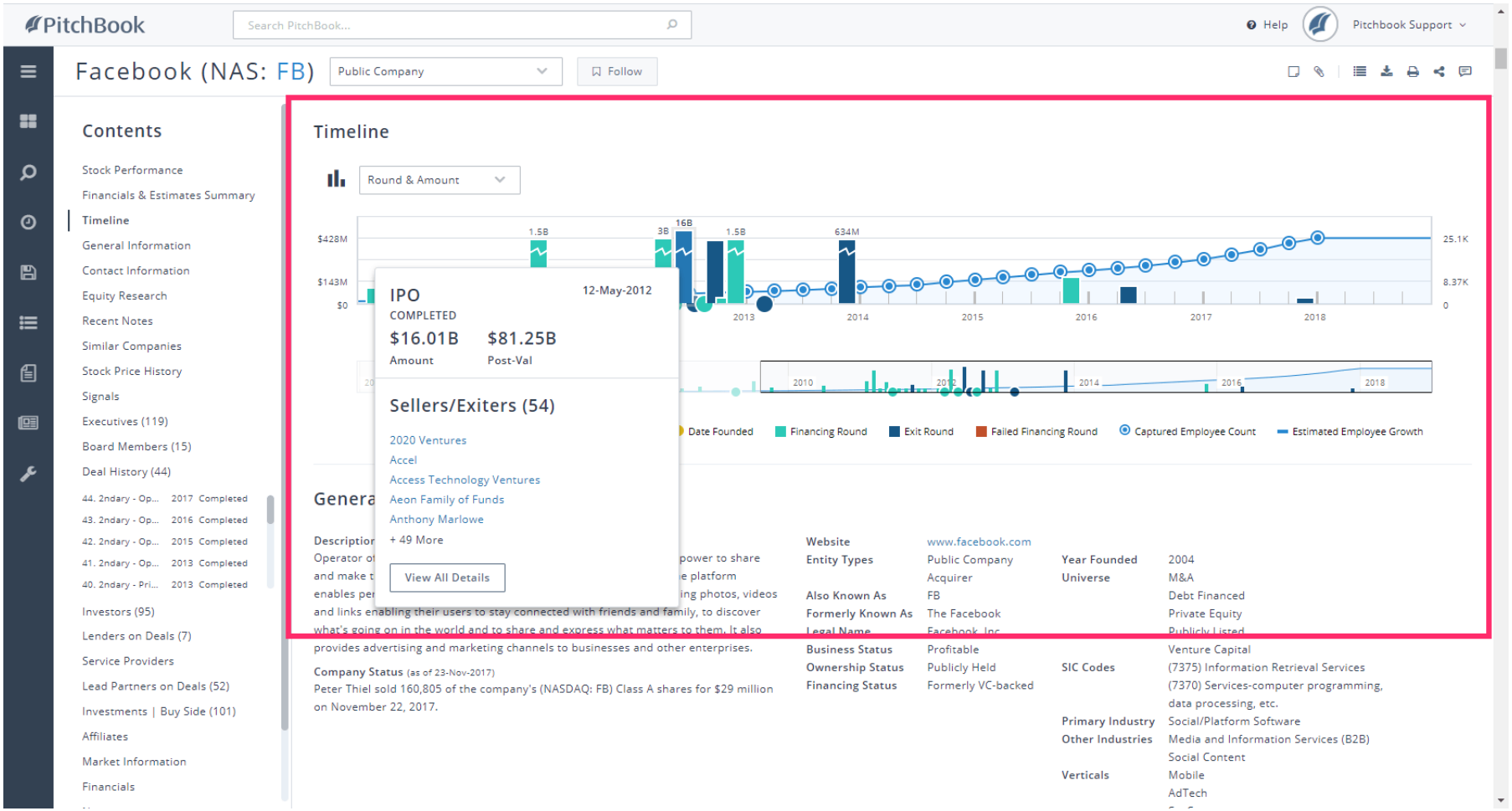
The Financials section provides a look at the company's historical financials (EV, Revenue, EBITDA, etc.) as reported on their income statement. The Consensus Estimates section displays the projected financial figures for each of the main data points.



Viewing a Company Profile

PitchBook Data

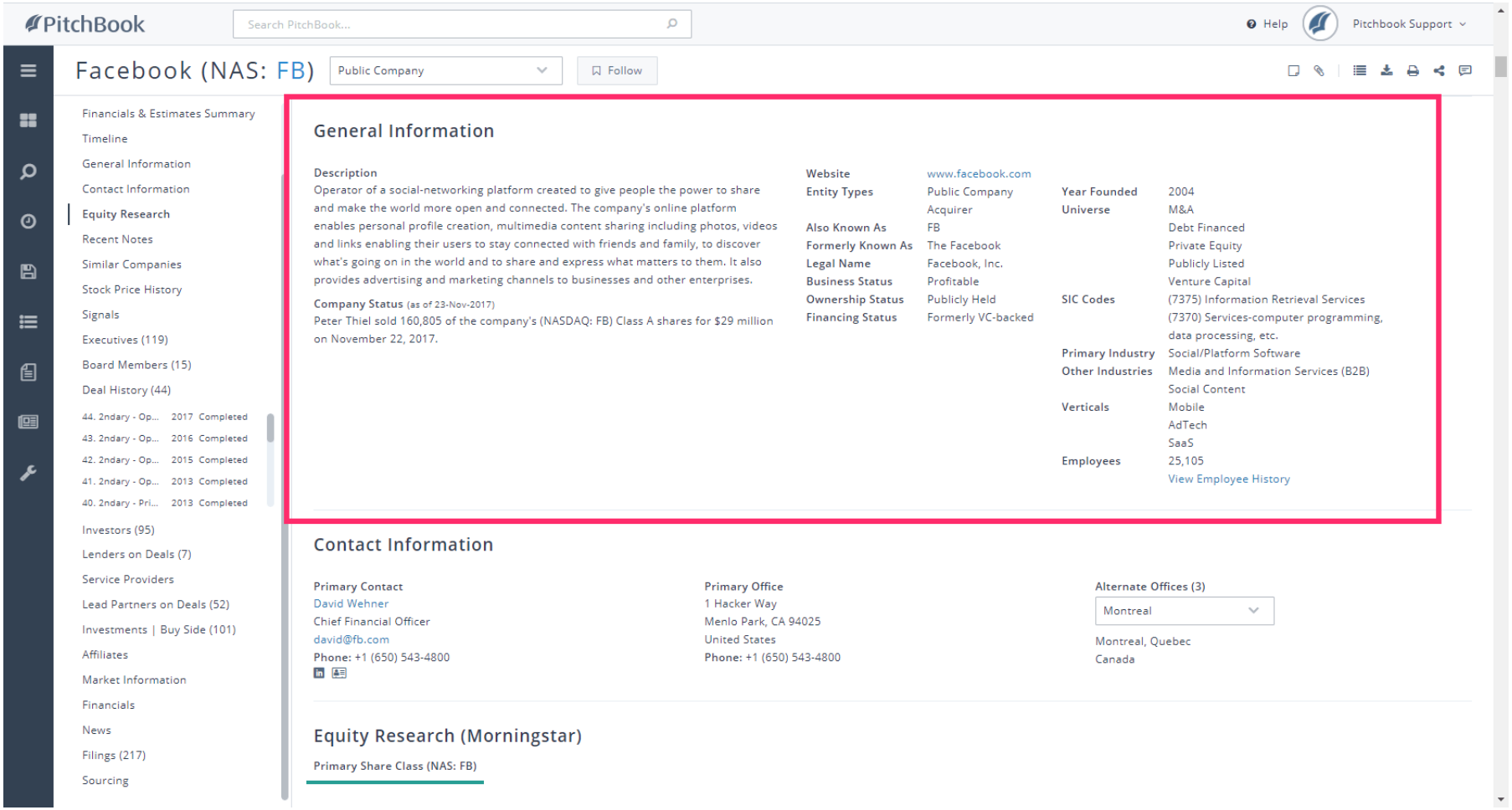
The Timeline section covers the company's growth. The dotted line represents their employee count. The vertical bars represent the capital they received from each deal. You can hover to see more information. The example shows details on their IPO.



Viewing a Company Profile

PitchBook Data

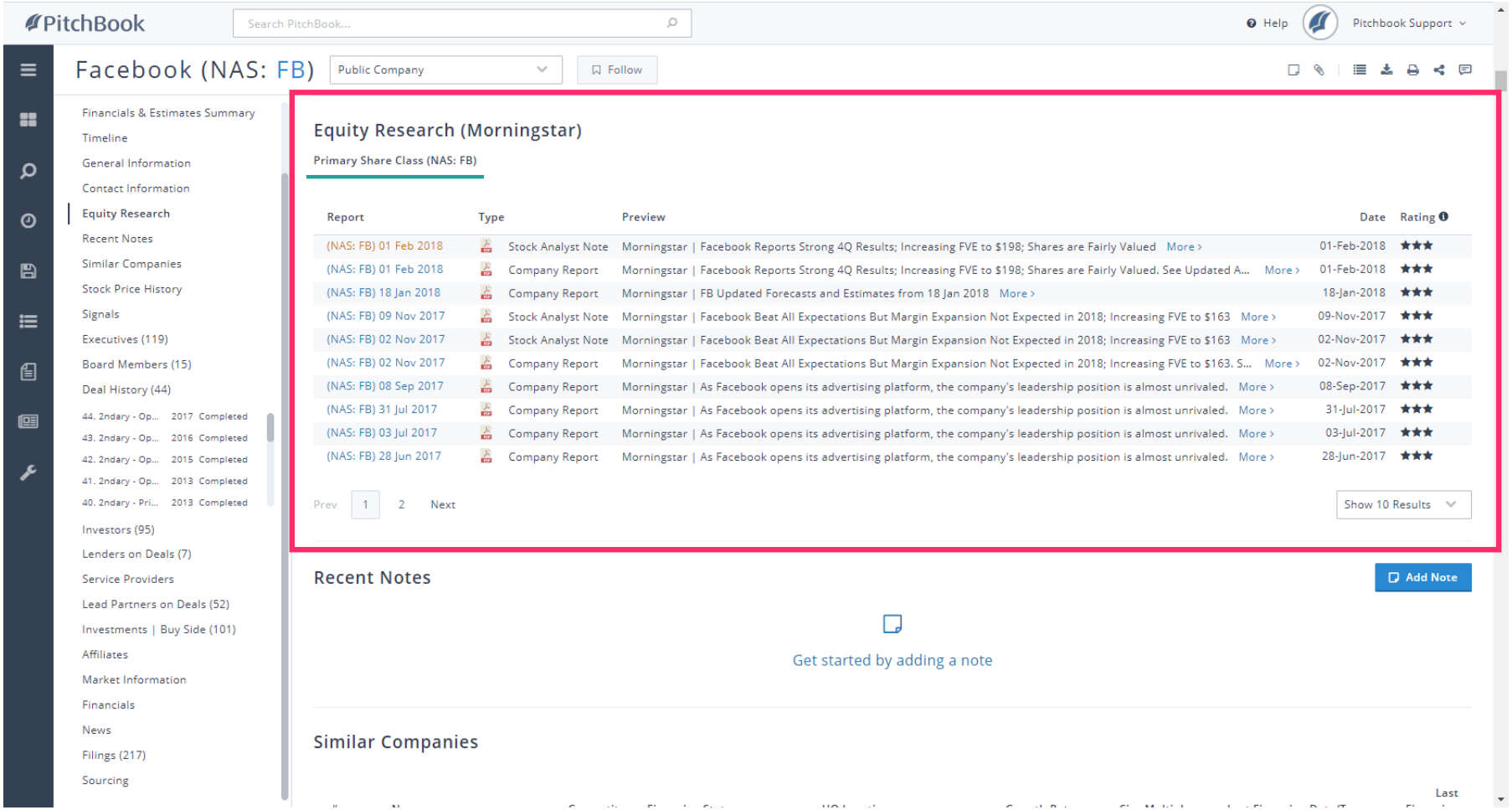
The General Information section provides a summary of the company. It includes their business description, ownership status, industry classification, and more.



Viewing a Company Profile

PitchBook Data

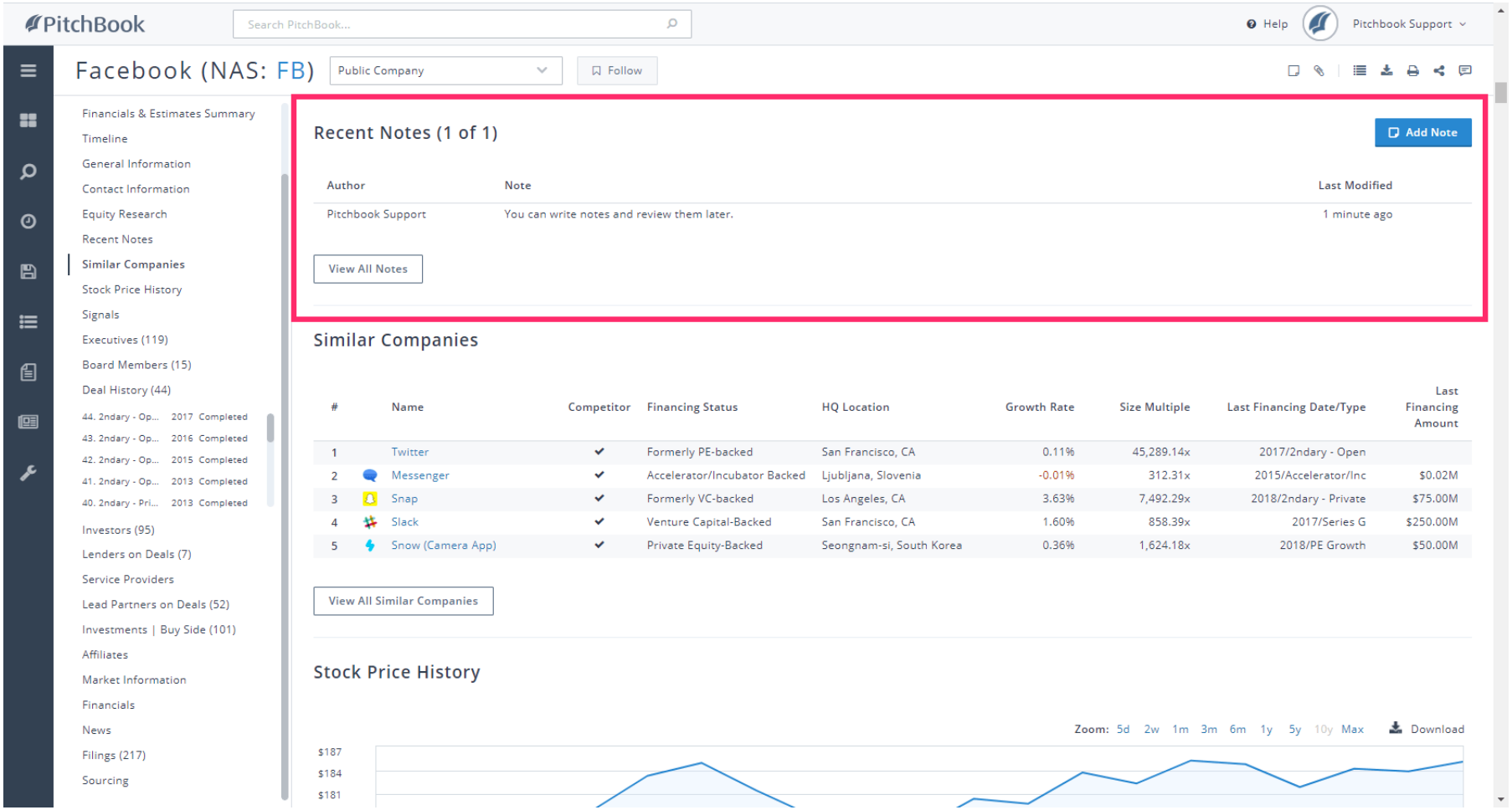
The Equity Research section contains reports sourced from our parent company, Morningstar. These reports summarize and break down information about the specified company, and ultimately provide a recommendation to buy, sell or hold.



Viewing a Company Profile

PitchBook Data

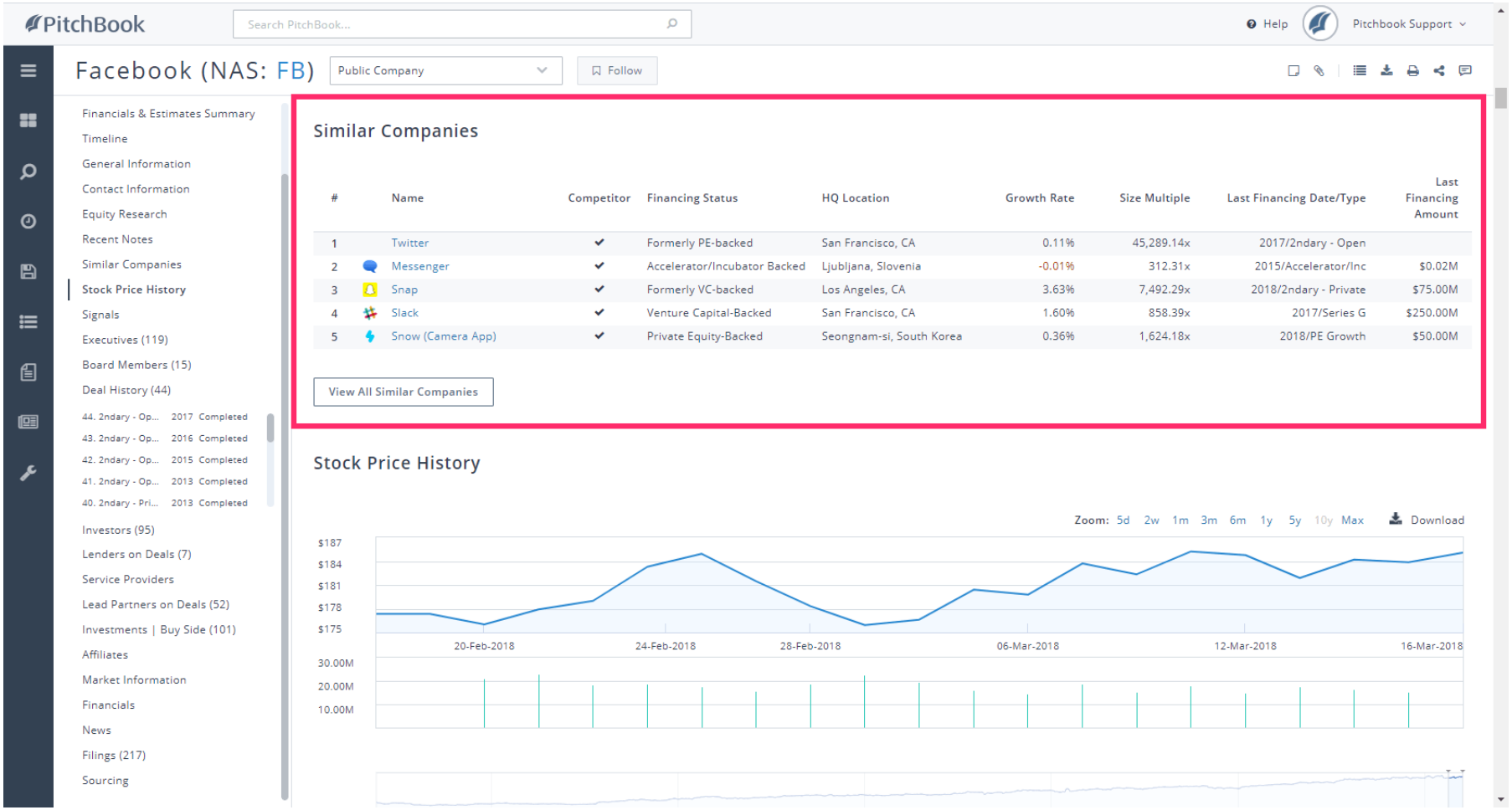
The Recent Notes section allows you to add notes about the company or review previously written notes.



Viewing a Company Profile

PitchBook Data

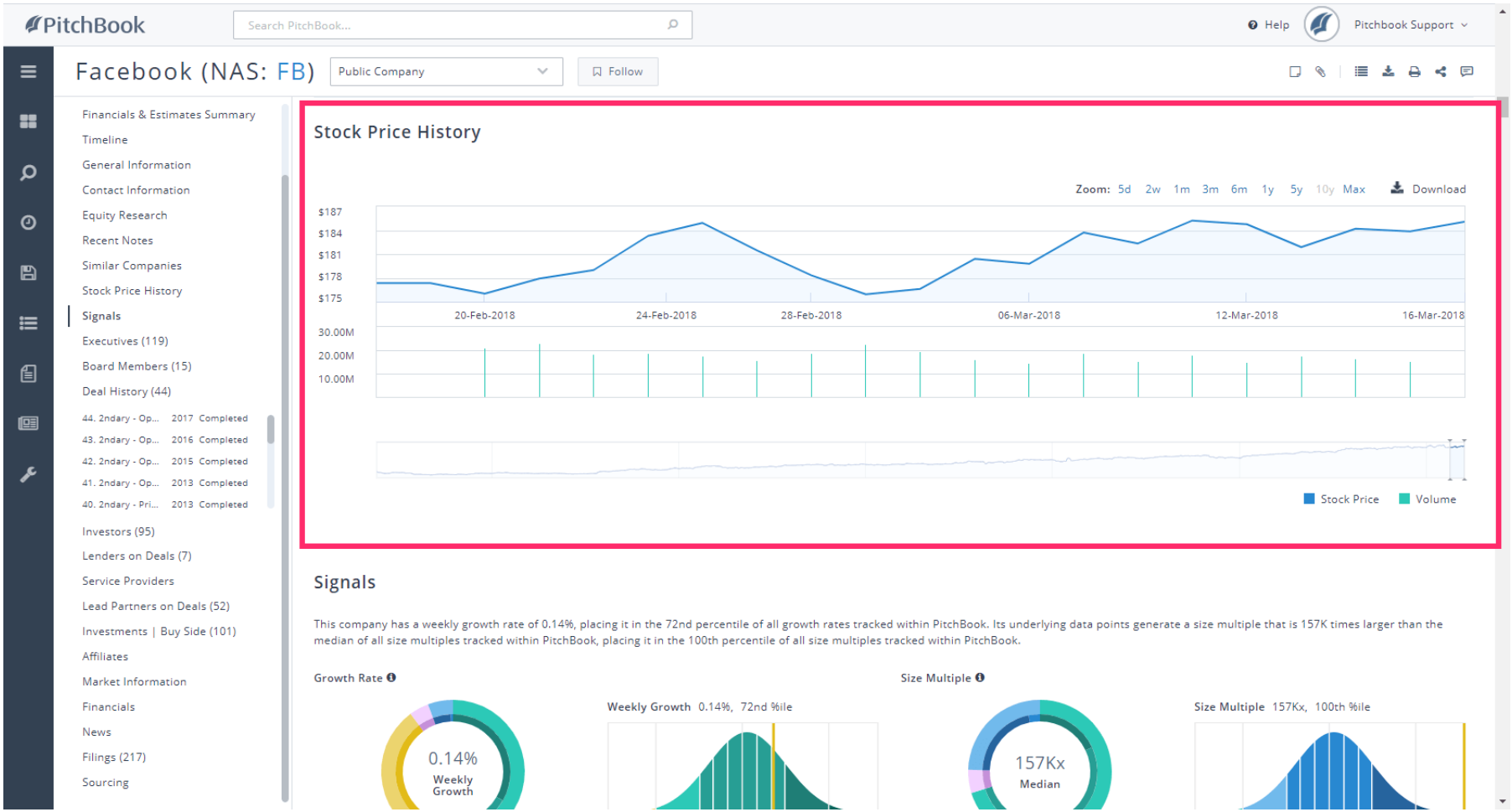
The Similar Companies section lists five other similar companies based on their industry and size.



Viewing a Company Profile

PitchBook Data

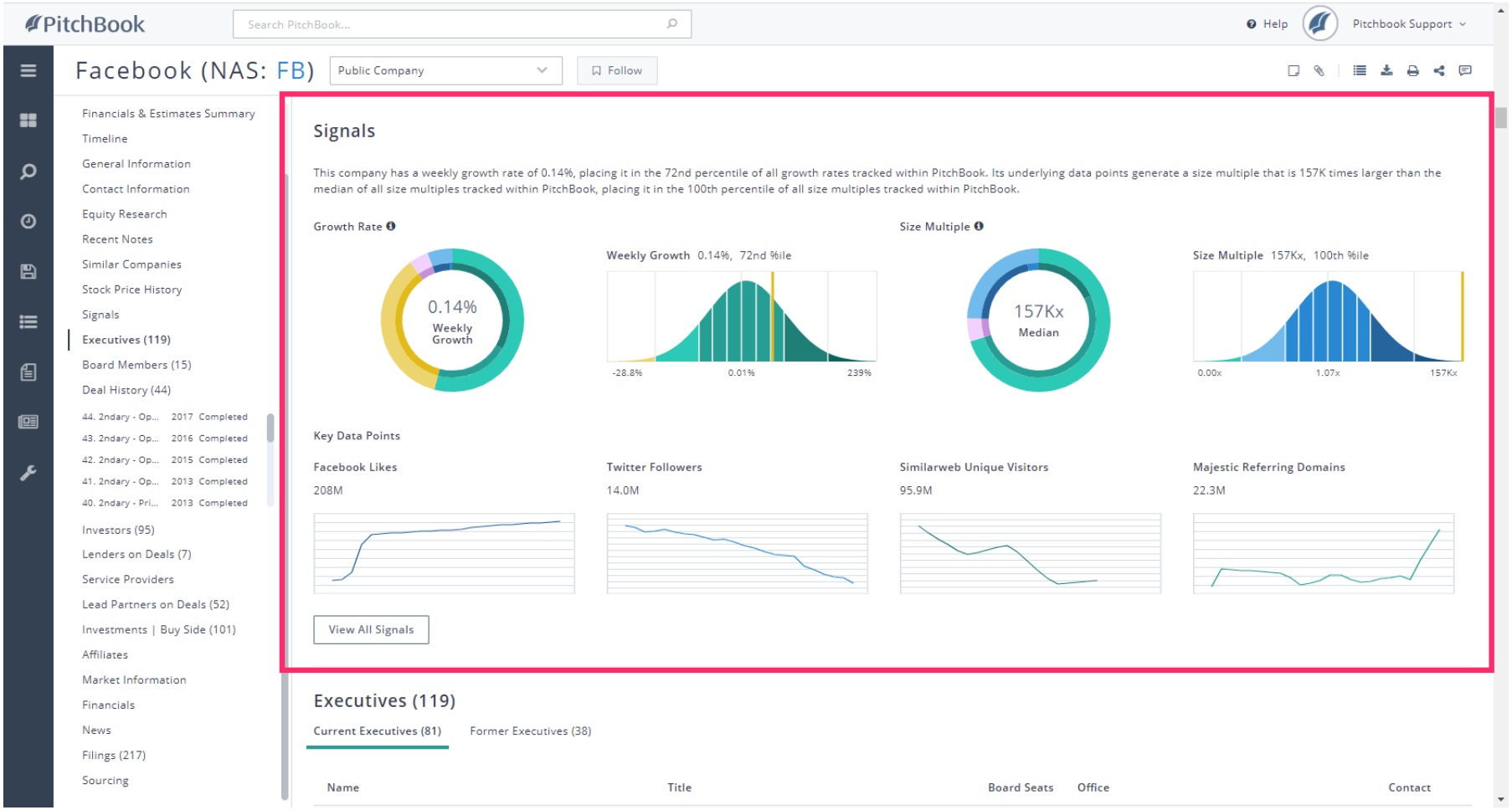
The Stock Price History allows you to take a deeper look into the company's stock price. The chart is larger and you can change the Zoom settings to view the stock price changes over different time periods.



Viewing a Company Profile

PitchBook Data

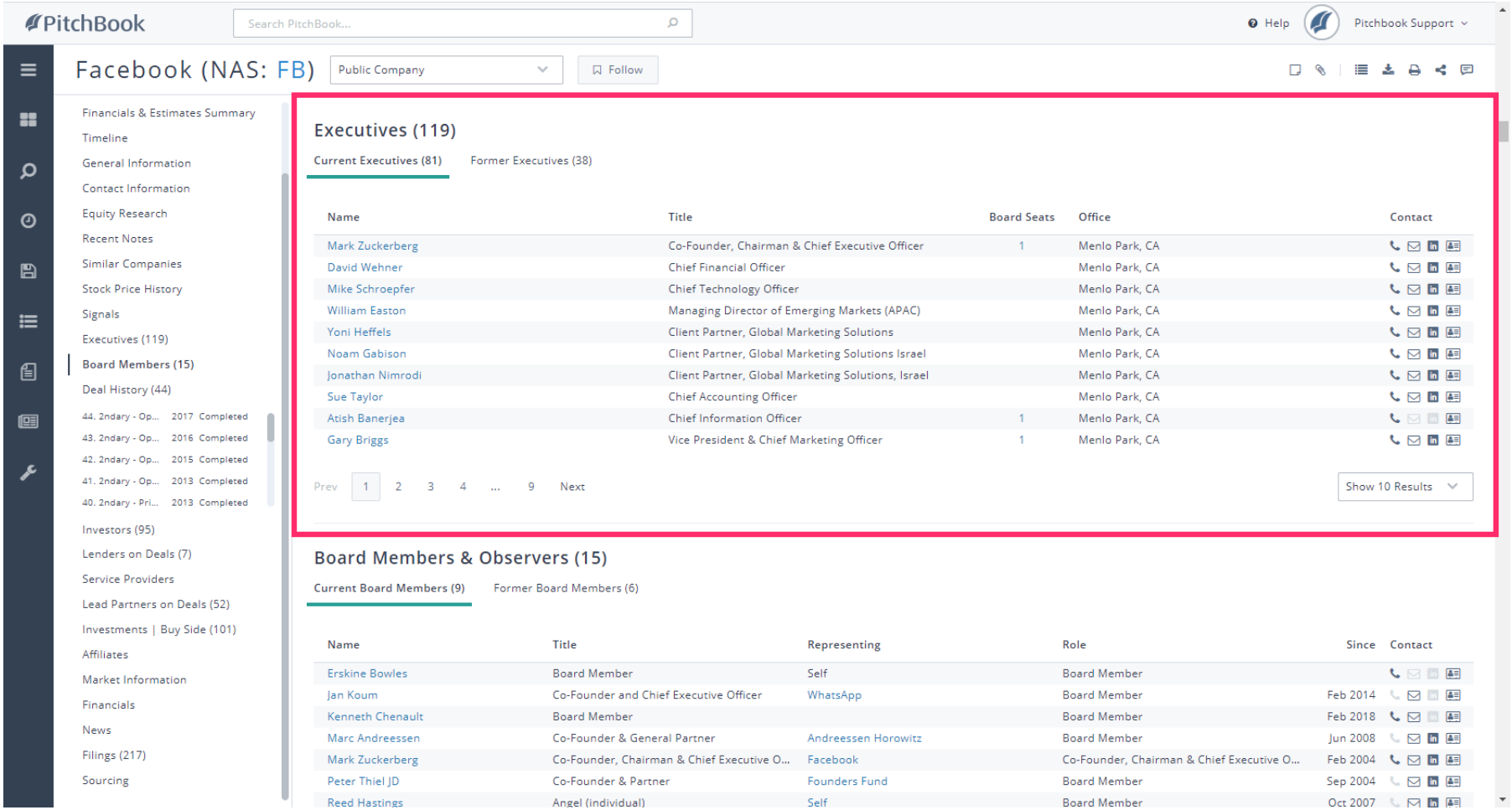
The Signals section looks at non-financial metrics of a company's growth and size. It incorporates web traffic and social media presence.



Viewing a Company Profile

PitchBook Data

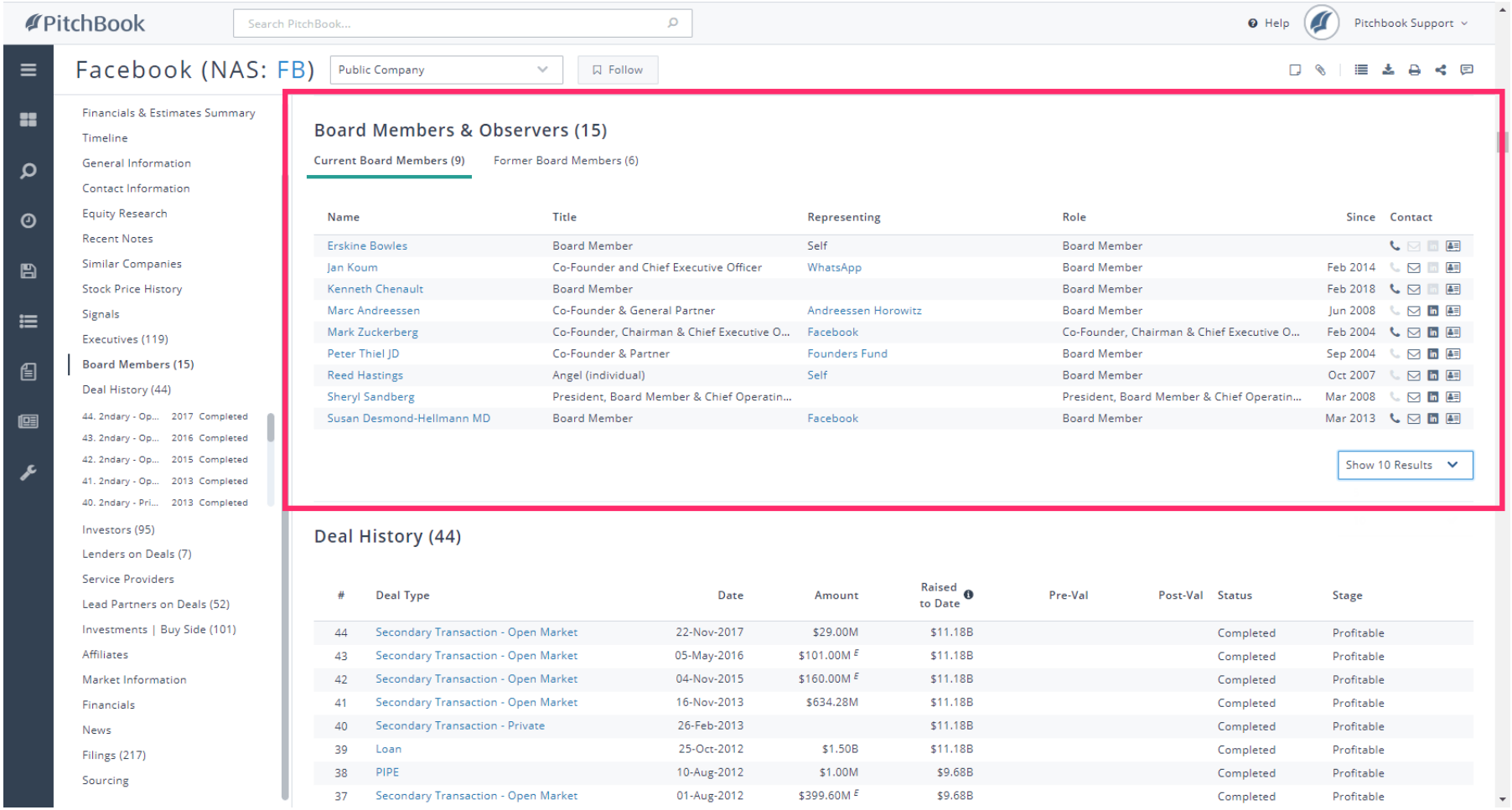
The Executives section lists all the current and former members of a company's executive management team. In addition to their name and title, you can access their contact information through the buttons on the right side.



Viewing a Company Profile

PitchBook Data

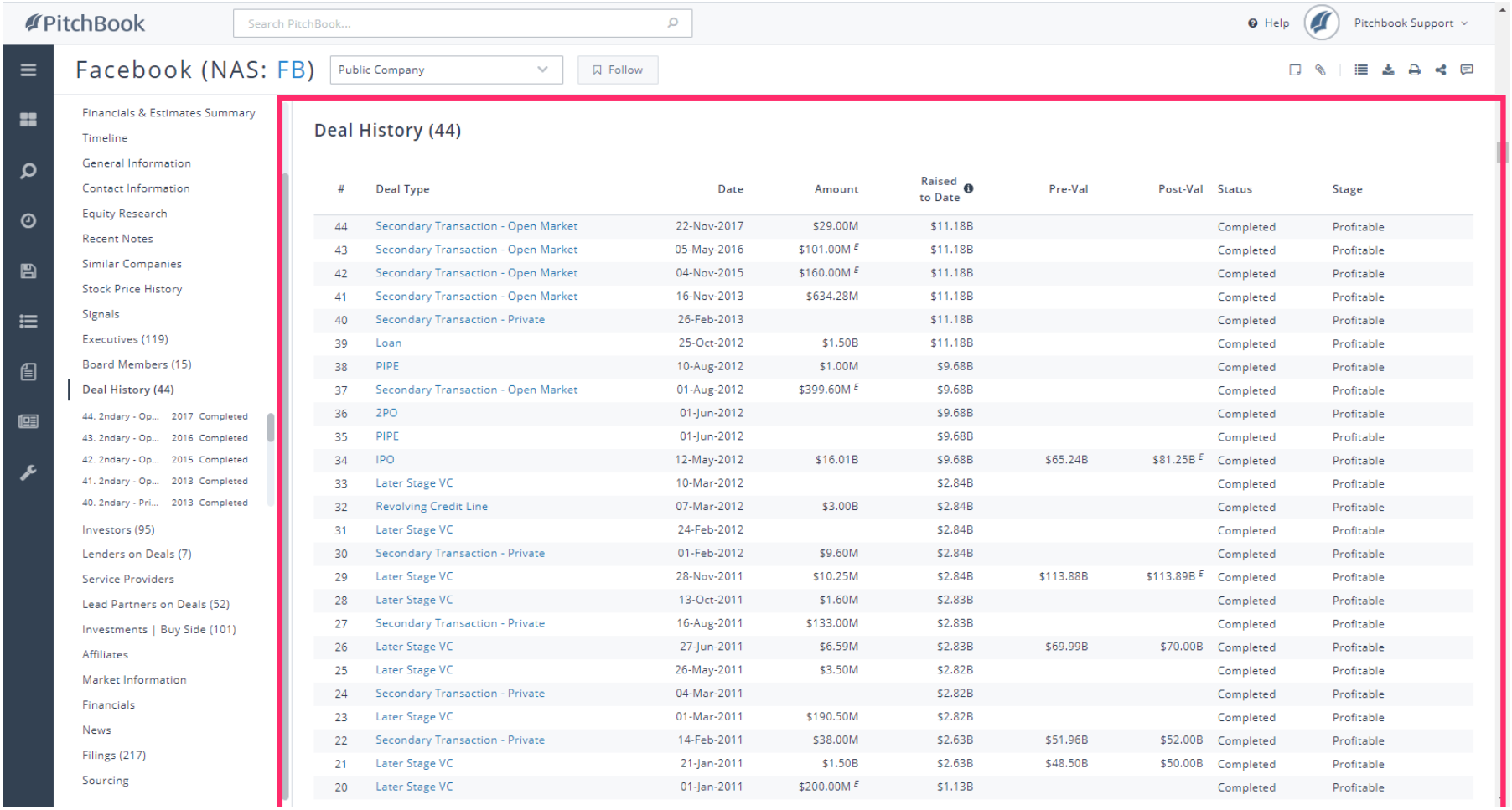
The Board Members & Observers section lists all of the people that sit on the company's board of directors. It gives their name, title, and the name of the company they're representing while on the board.



Viewing a Company Profile

PitchBook Data

The Deal History section will list every financing event the company has gone through since being founded. It will cover the deal type, date, deal size amount, and the post valuation as a result of the deal.



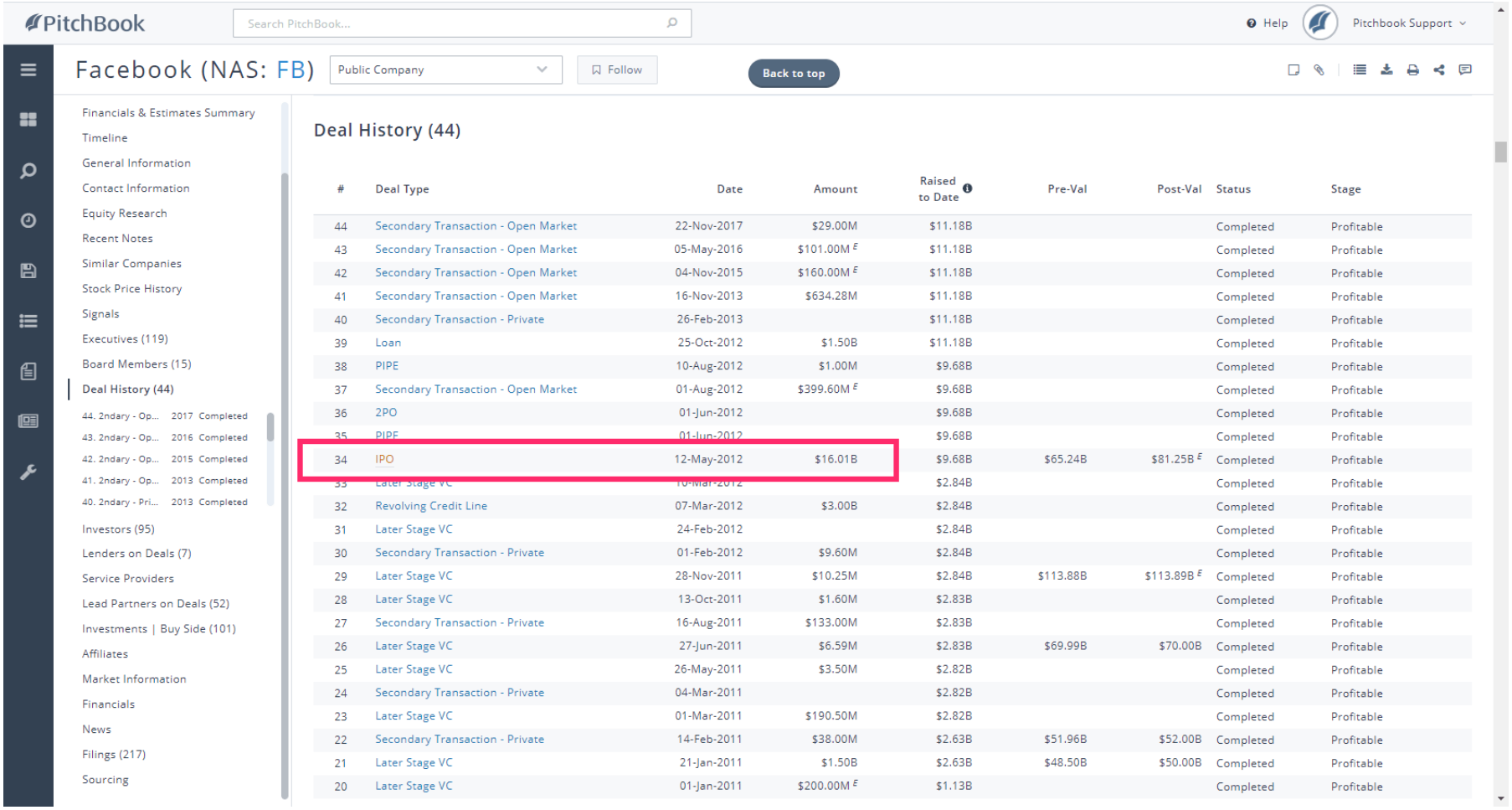
Deal History (44)

#	Deal Type	Date	Amount	Raised to Date	Pre-Val	Post-Val	Status	Stage
44	Secondary Transaction - Open Market	22-Nov-2017	$29.00M	$11.18B			Completed	Profitable
43	Secondary Transaction - Open Market	05-May-2016	$101.00M E	$11.18B			Completed	Profitable
42	Secondary Transaction - Open Market	04-Nov-2015	$160.00M E	$11.18B			Completed	Profitable
41	Secondary Transaction - Open Market	16-Nov-2013	$634.28M	$11.18B			Completed	Profitable
40	Secondary Transaction - Private	26-Feb-2013		$11.18B			Completed	Profitable
39	Loan	25-Oct-2012	$1.50B	$11.18B			Completed	Profitable
38	PIPE	10-Aug-2012	$1.00M	$9.68B			Completed	Profitable
37	Secondary Transaction - Open Market	01-Aug-2012	$399.60M E	$9.68B			Completed	Profitable
36	2PO	01-Jun-2012		$9.68B			Completed	Profitable
35	PIPE	01-Jun-2012		$9.68B			Completed	Profitable
34	IPO	12-May-2012	$16.01B	$9.68B	$65.24B	$81.25B E	Completed	Profitable
33	Later Stage VC	10-Mar-2012		$2.84B			Completed	Profitable
32	Revolving Credit Line	07-Mar-2012	$3.00B	$2.84B			Completed	Profitable
31	Later Stage VC	24-Feb-2012		$2.84B			Completed	Profitable
30	Secondary Transaction - Private	01-Feb-2012	$9.60M	$2.84B			Completed	Profitable
29	Later Stage VC	28-Nov-2011	$10.25M	$2.84B	$113.88B	$113.89B E	Completed	Profitable
28	Later Stage VC	13-Oct-2011	$1.60M	$2.83B			Completed	Profitable
27	Secondary Transaction - Private	16-Aug-2011	$133.00M	$2.83B			Completed	Profitable
26	Later Stage VC	27-Jun-2011	$6.59M	$2.83B	$69.99B	$70.00B	Completed	Profitable
25	Later Stage VC	26-May-2011	$3.50M	$2.82B			Completed	Profitable
24	Secondary Transaction - Private	04-Mar-2011		$2.82B			Completed	Profitable
23	Later Stage VC	01-Mar-2011	$190.50M	$2.82B			Completed	Profitable
22	Secondary Transaction - Private	14-Feb-2011	$38.00M	$2.63B	$51.96B	$52.00B	Completed	Profitable
21	Later Stage VC	21-Jan-2011	$1.50B	$2.63B	$48.50B	$50.00B	Completed	Profitable
20	Later Stage VC	01-Jan-2011	$200.00M E	$1.13B			Completed	Profitable

Viewing a Company Profile

PitchBook Data

You can click on any deal to see more details. Click Deal #34 - IPO



#	Deal Type	Date	Amount	Raised to Date	Pre-Val	Post-Val	Status	Stage
44	Secondary Transaction - Open Market	22-Nov-2017	$29.00M	$11.18B			Completed	Profitable
43	Secondary Transaction - Open Market	05-May-2016	$101.00M E	$11.18B			Completed	Profitable
42	Secondary Transaction - Open Market	04-Nov-2015	$160.00M E	$11.18B			Completed	Profitable
41	Secondary Transaction - Open Market	16-Nov-2013	$634.28M	$11.18B			Completed	Profitable
40	Secondary Transaction - Private	26-Feb-2013		$11.18B			Completed	Profitable
39	Loan	25-Oct-2012	$1.50B	$11.18B			Completed	Profitable
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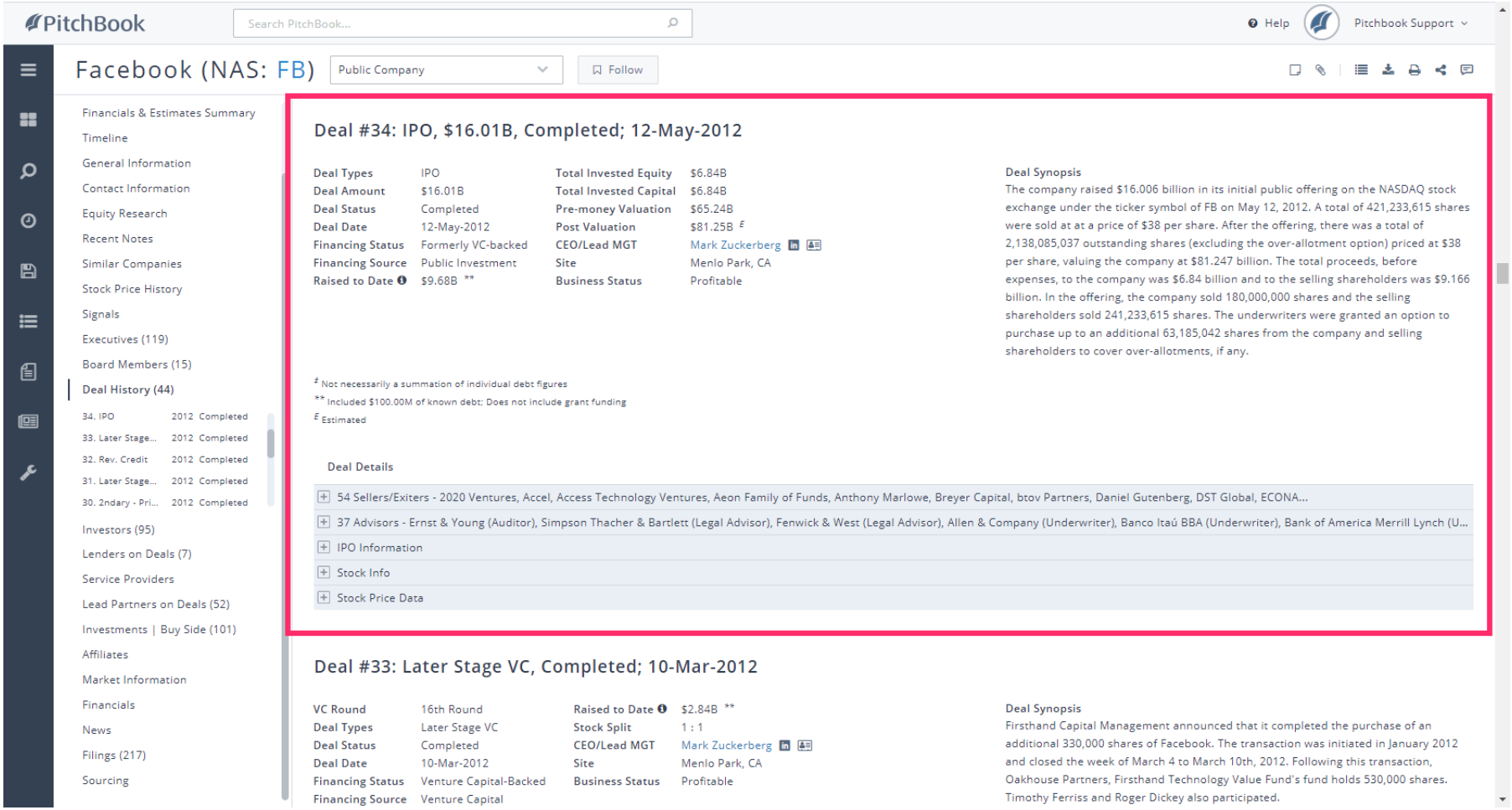
37	Secondary Transaction - Open Market	01-Aug-2012	$399.60M E	$9.68B			Completed	Profitable
36	2PO	01-Jun-2012		$9.68B			Completed	Profitable
35	PIPE	01-Jun-2012		$9.68B			Completed	Profitable
34	IPO	12-May-2012	$16.01B	$9.68B	$65.24B	$81.25B E	Completed	Profitable
33	Later Stage VC	10-Mar-2012		$2.84B			Completed	Profitable
32	Revolving Credit Line	07-Mar-2012	$3.00B	$2.84B			Completed	Profitable
31	Later Stage VC	24-Feb-2012		$2.84B			Completed	Profitable
30	Secondary Transaction - Private	01-Feb-2012	$9.60M	$2.84B			Completed	Profitable
29	Later Stage VC	28-Nov-2011	$10.25M	$2.84B	$113.88B	$113.89B E	Completed	Profitable
28	Later Stage VC	13-Oct-2011	$1.60M	$2.83B			Completed	Profitable
27	Secondary Transaction - Private	16-Aug-2011	$133.00M	$2.83B			Completed	Profitable
26	Later Stage VC	27-Jun-2011	$6.59M	$2.83B	$69.99B	$70.00B	Completed	Profitable
25	Later Stage VC	26-May-2011	$3.50M	$2.82B			Completed	Profitable
24	Secondary Transaction - Private	04-Mar-2011		$2.82B			Completed	Profitable
23	Later Stage VC	01-Mar-2011	$190.50M	$2.82B			Completed	Profitable
22	Secondary Transaction - Private	14-Feb-2011	$38.00M	$2.63B	$51.96B	$52.00B	Completed	Profitable
21	Later Stage VC	21-Jan-2011	$1.50B	$2.63B	$48.50B	$50.00B	Completed	Profitable
20	Later Stage VC	01-Jan-2011	$200.00M E	$1.13B			Completed	Profitable

Viewing a Company Profile

PitchBook Data

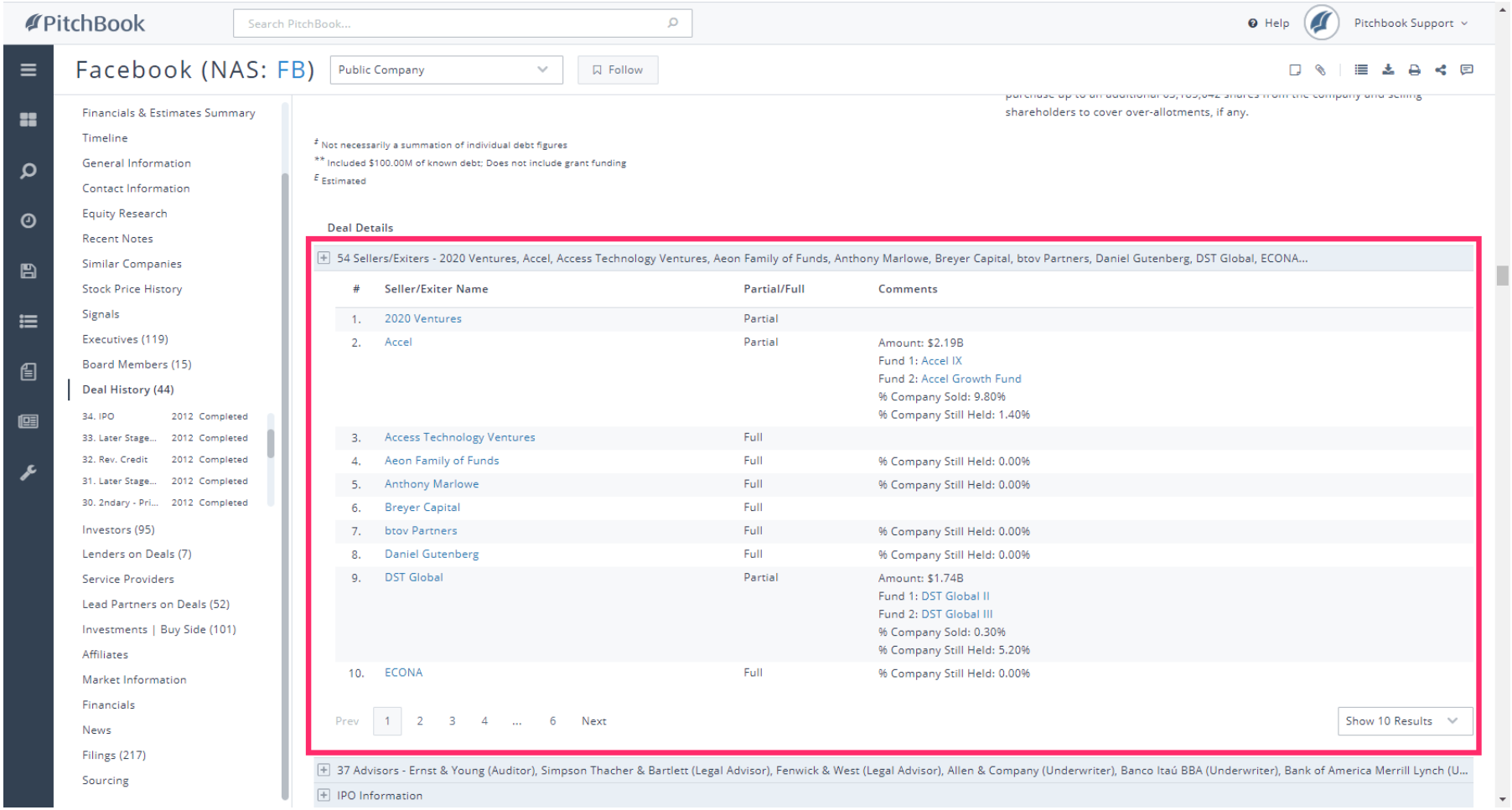
This leads us to a section within the profile that displays even more data regarding that single transaction. Next, let's take a look at how we can expand the Deal Details for a more in-depth look.



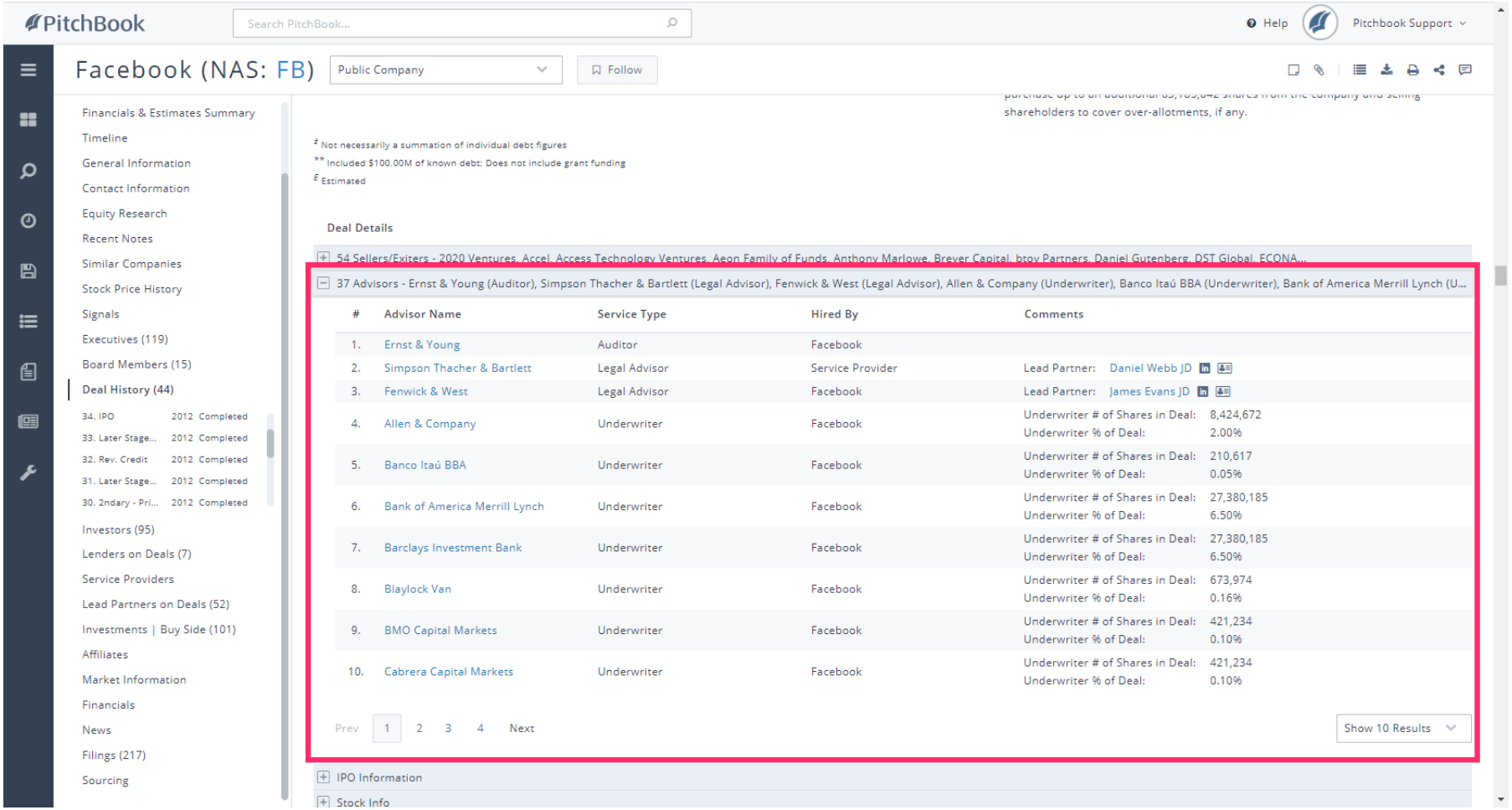
Viewing a Company Profile

PitchBook Data

This Sellers/Exiters section lists all of the investors that sold their shares in the company at the time of the transaction. We can see the firm's name along with their ownership percentage.



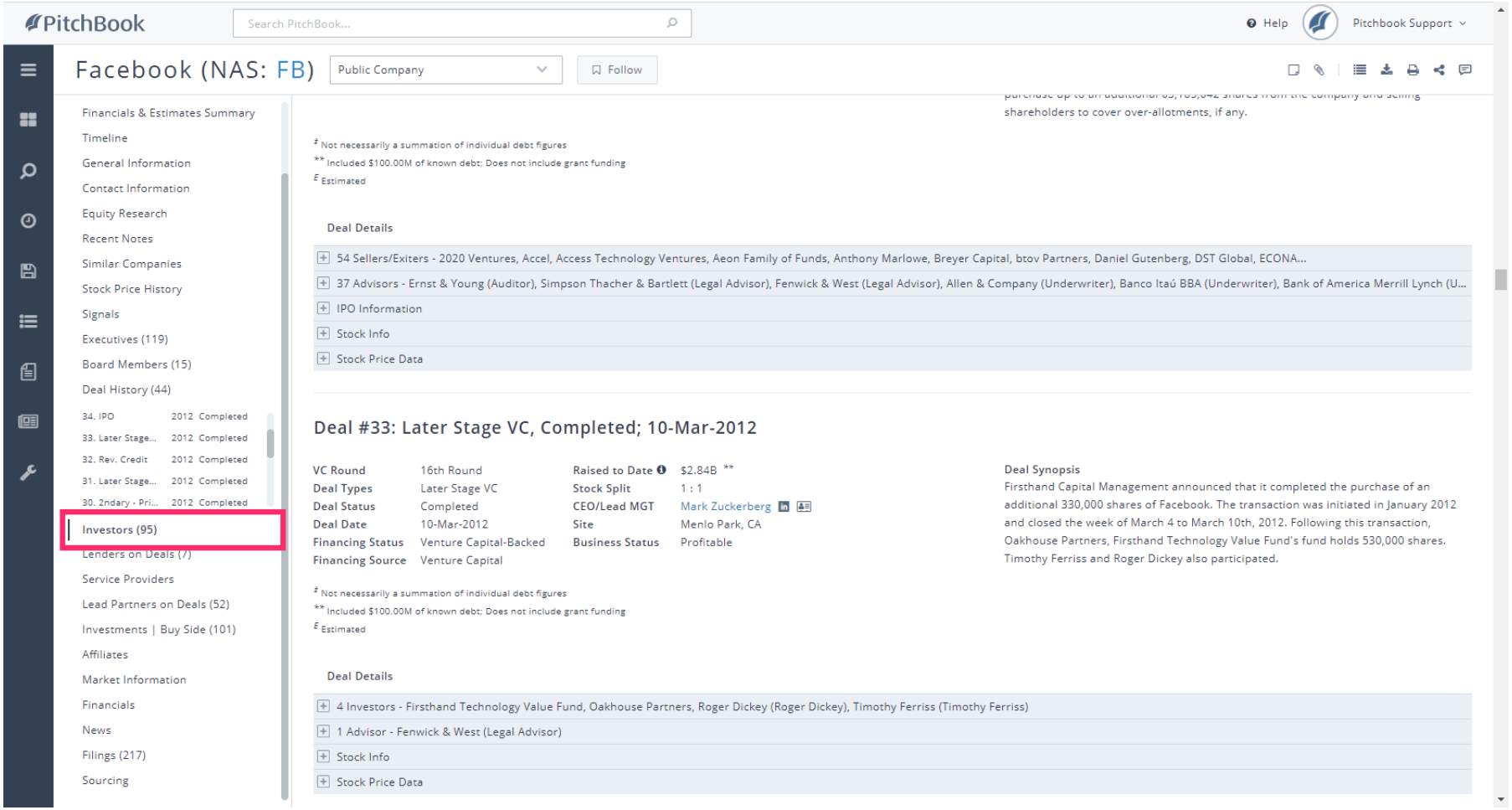
The Advisors section lists all of the Service Providers that were hired by the company to help facilitate the deal. We can see the SP's name, the service they provided, and any additional comments.



Viewing a Company Profile

PitchBook Data

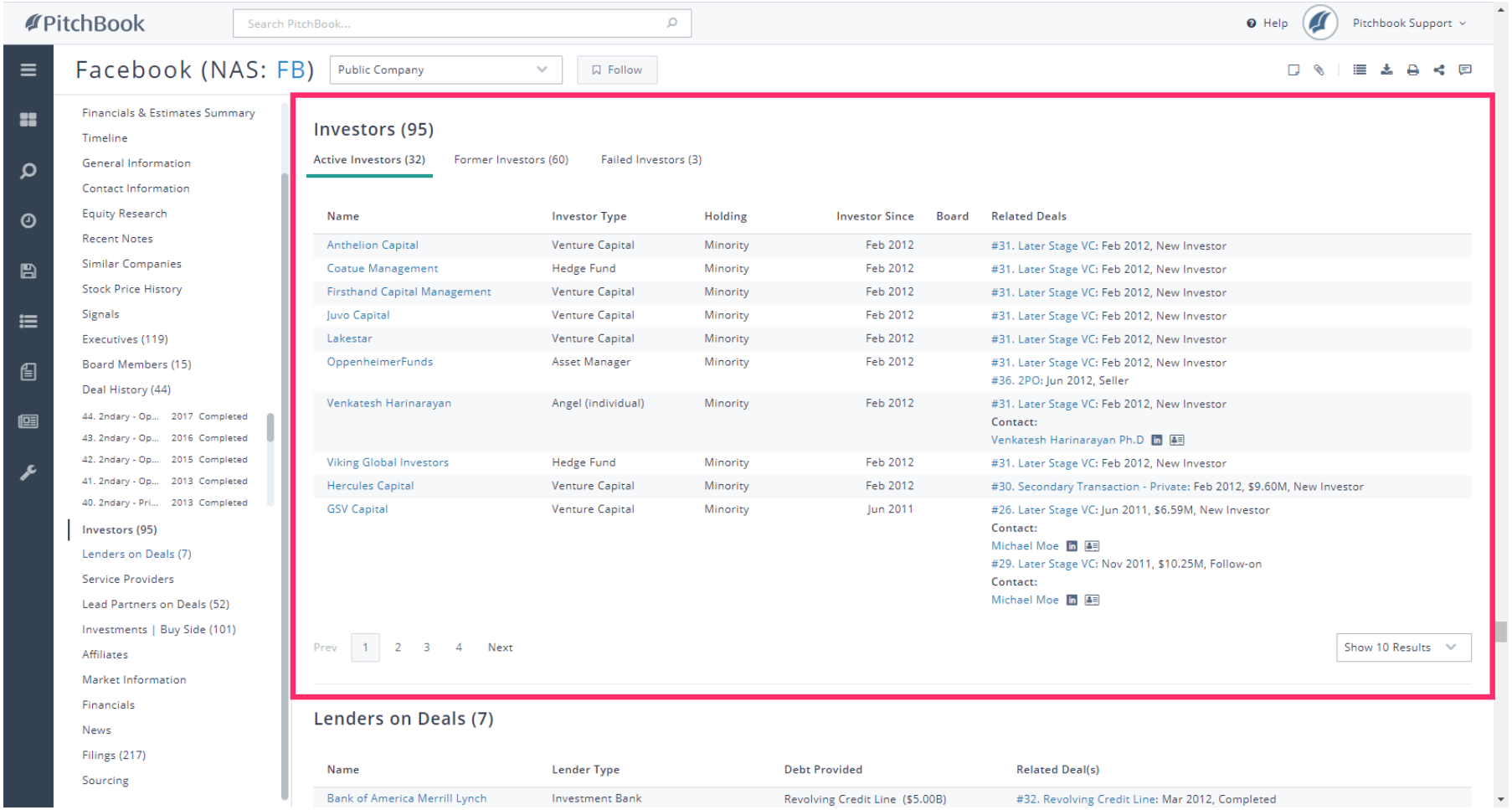
Now you know how to view a company's entire deal history, as well as diving deeper on a single transaction. Let's pick back up and continue navigating through the other sections found on a company profile. Click Investors



Viewing a Company Profile

PitchBook Data

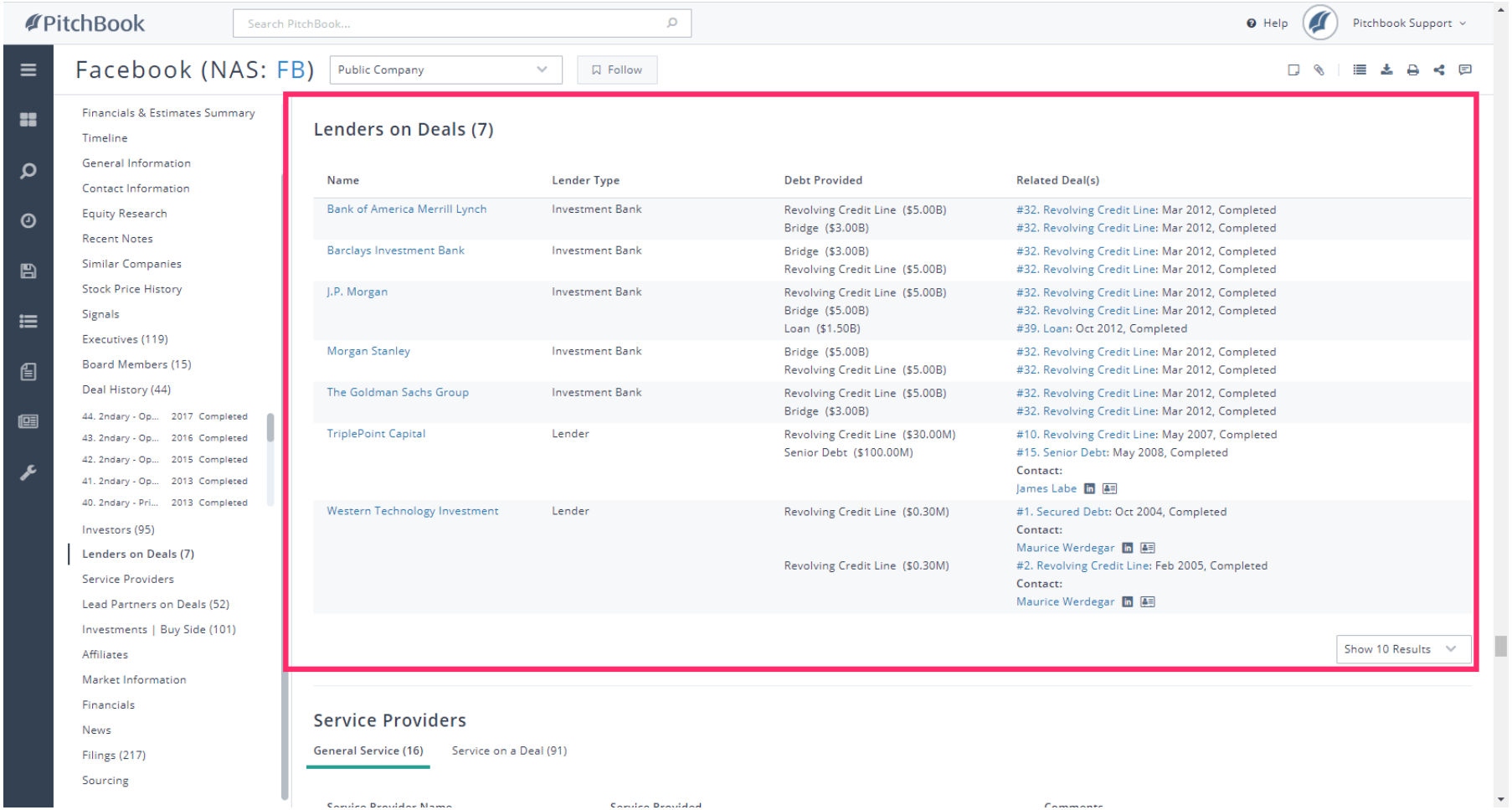
The Investors section lists all of the individuals or firms that have ever been involved in a transaction with the company. It displays their name, investor type, and when they became an investor. You can click on their name to visit their profile.



Viewing a Company Profile

PitchBook Data

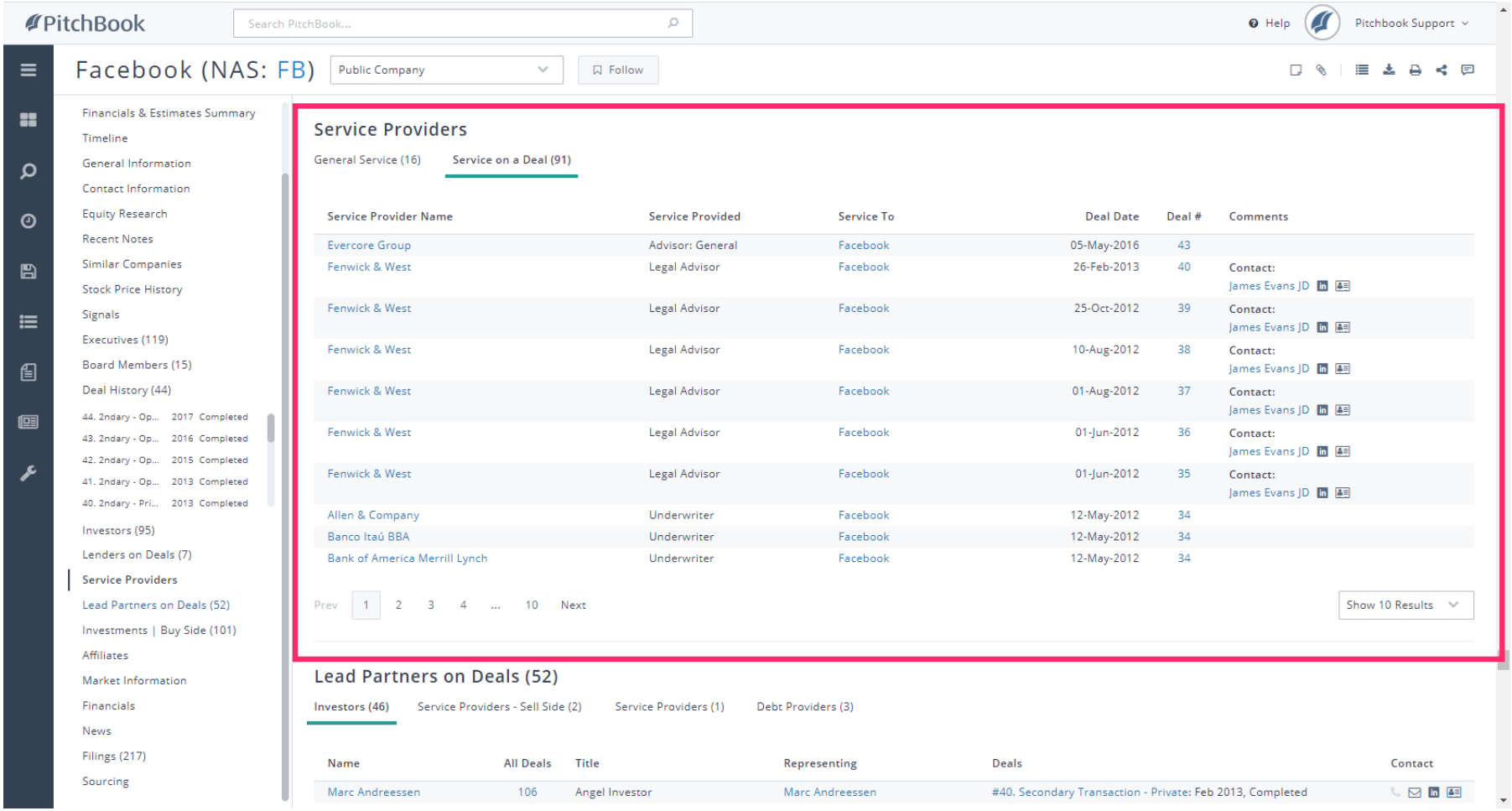
The Lenders on Deals section lists all the lenders and banks that provided debt to the company. It displays the Lender's name, the type of debt, and the deal in which it was received.



Viewing a Company Profile

PitchBook Data

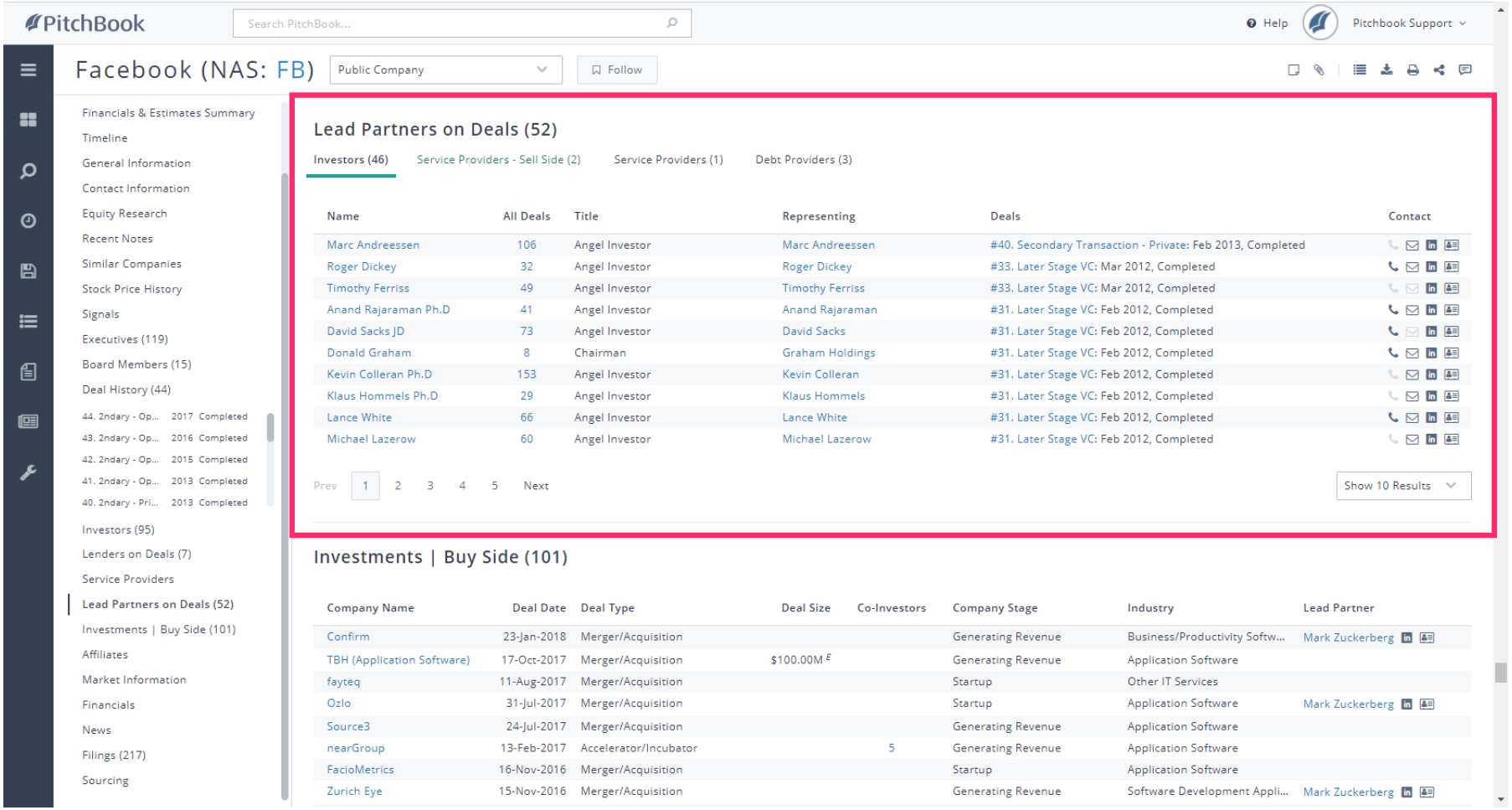
The Service Providers section lists all of the firms that were brought in to help facilitate a transaction. It displays the firm's name, the type of service provided, and the deal they were involved in.



Viewing a Company Profile

PitchBook Data

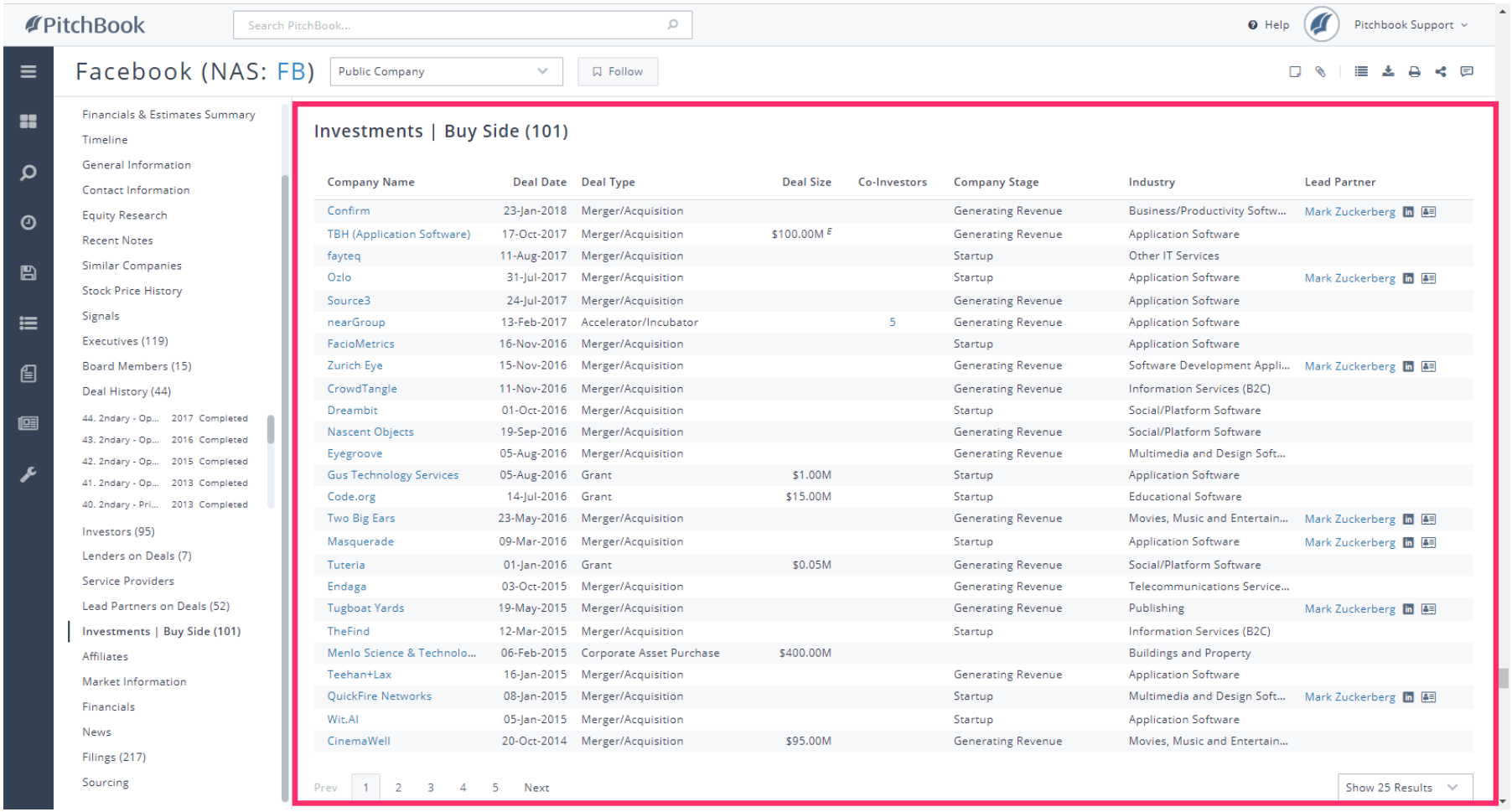
The Lead Partners on Deals section lists all of the professionals from any of Facebook's investors that have played a key role in managing and completing a deal. It displays their name, contact information, and the deals they've been apart of.



Viewing a Company Profile

PitchBook Data

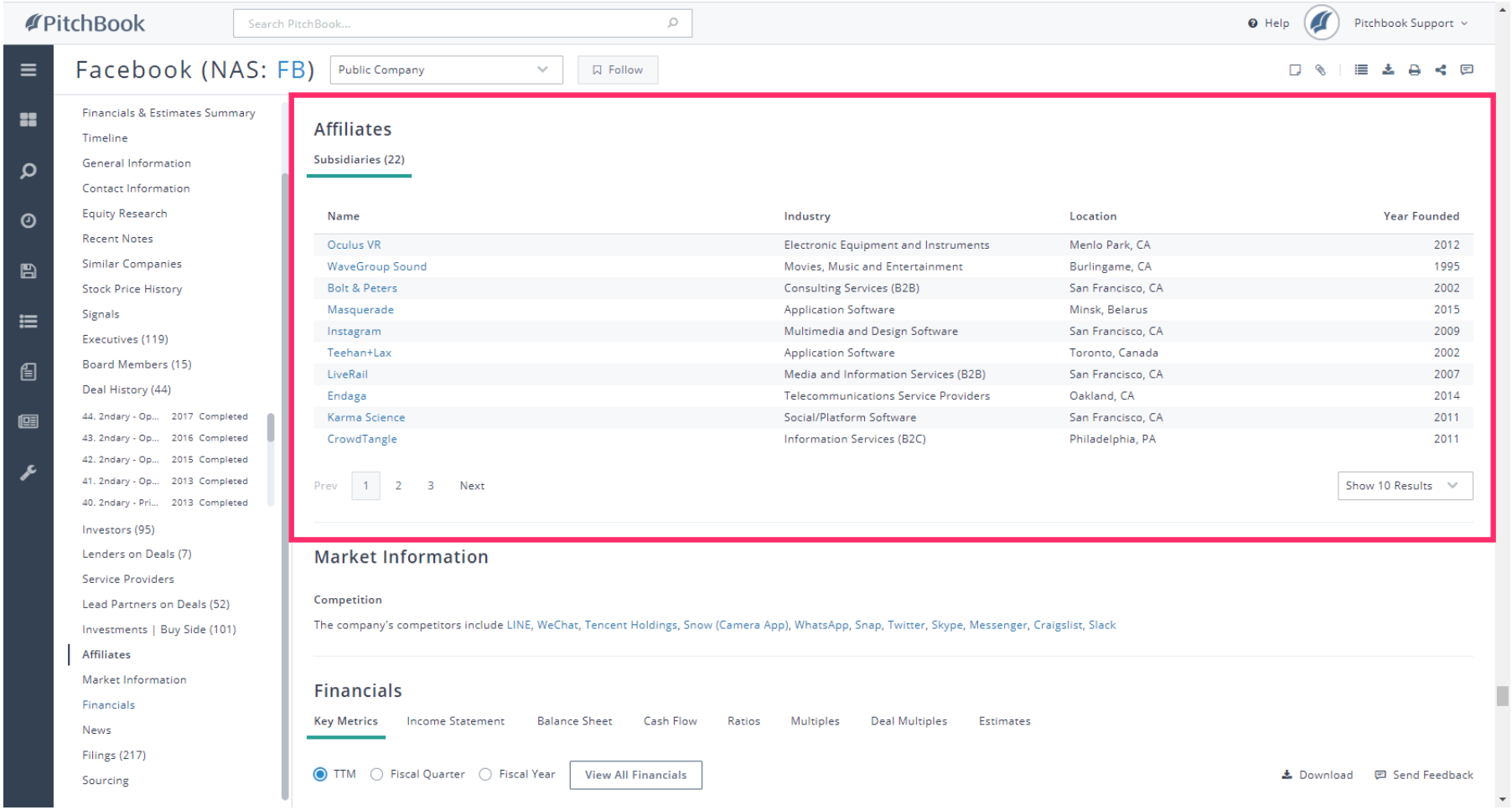
The Investments section displays all of the deals where the company was the Investor. In this particular example, we can see that Facebook had acquired multiple software companies through M&A deals.



Viewing a Company Profile

PitchBook Data

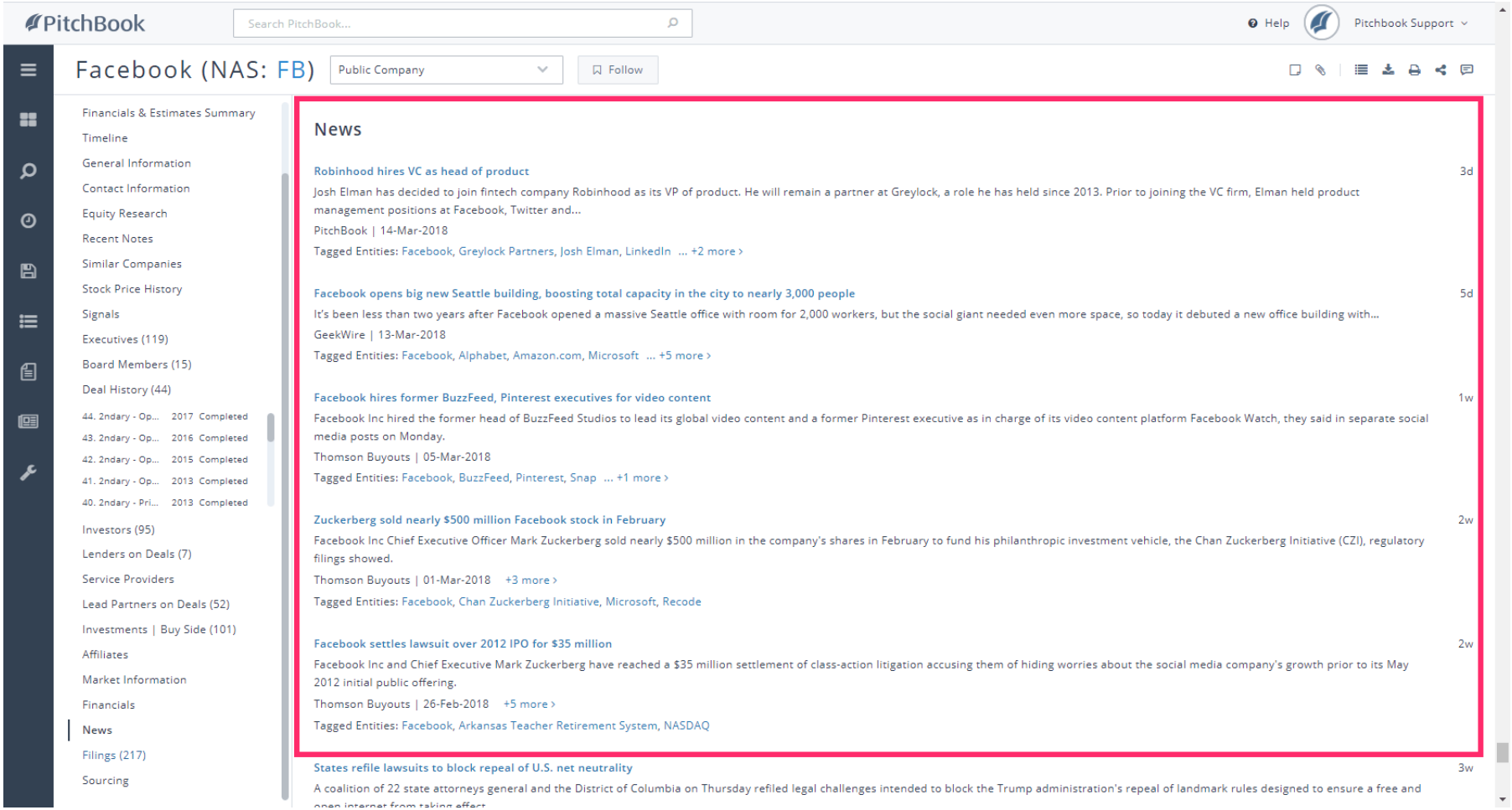
The Affiliates section lists any Parent Companies or Subsidiaries associated with the Investor. In this case, Facebook is the parent company of 22 subsidiaries. You can click any of the subsidiary names to visit their own profile.



Viewing a Company Profile

PitchBook Data

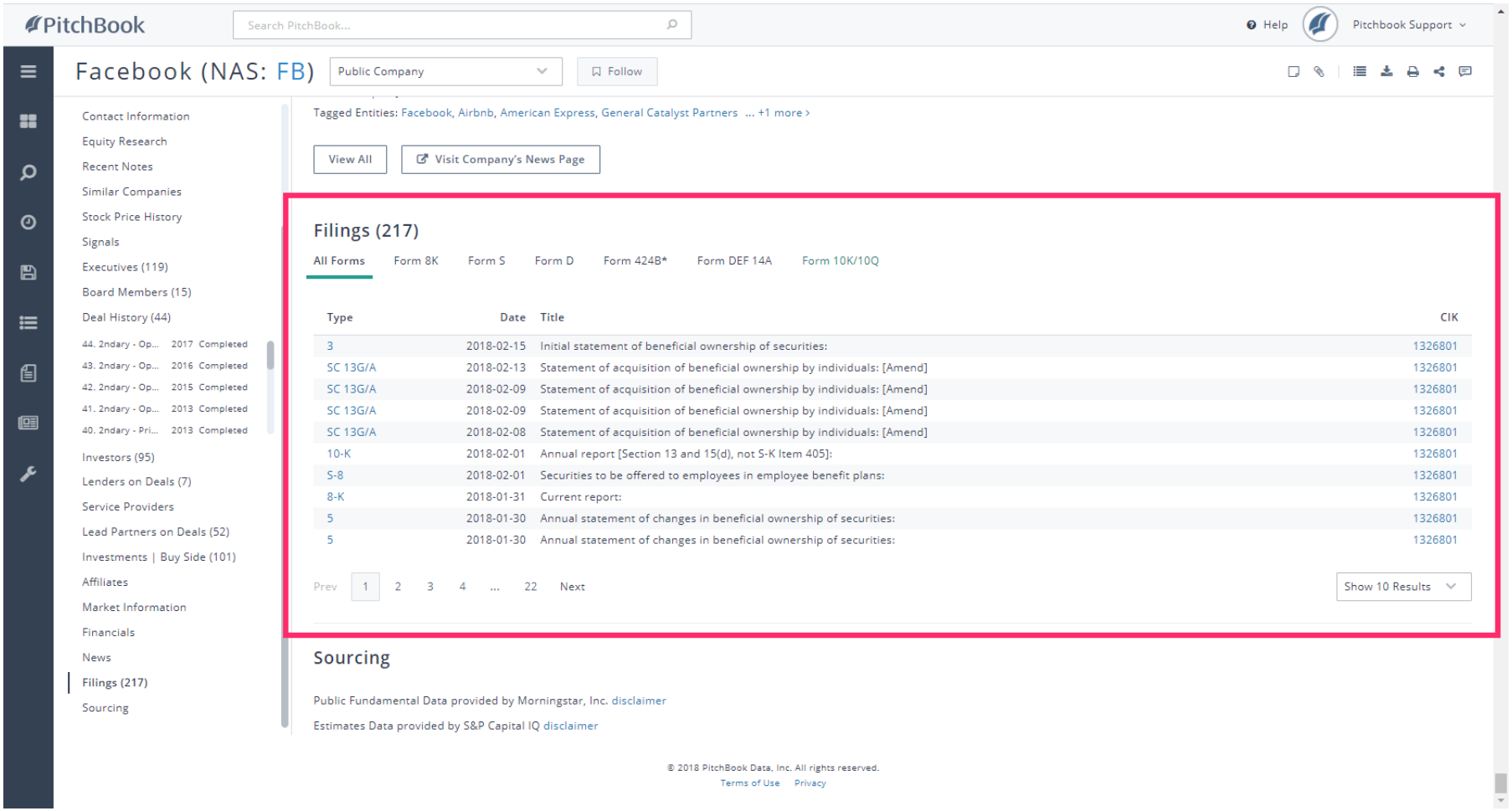
The News section will list the most recent articles that mention the company. Clicking on an article will open a new tab and take you to the website that the article was sourced from.



Viewing a Company Profile

PitchBook Data

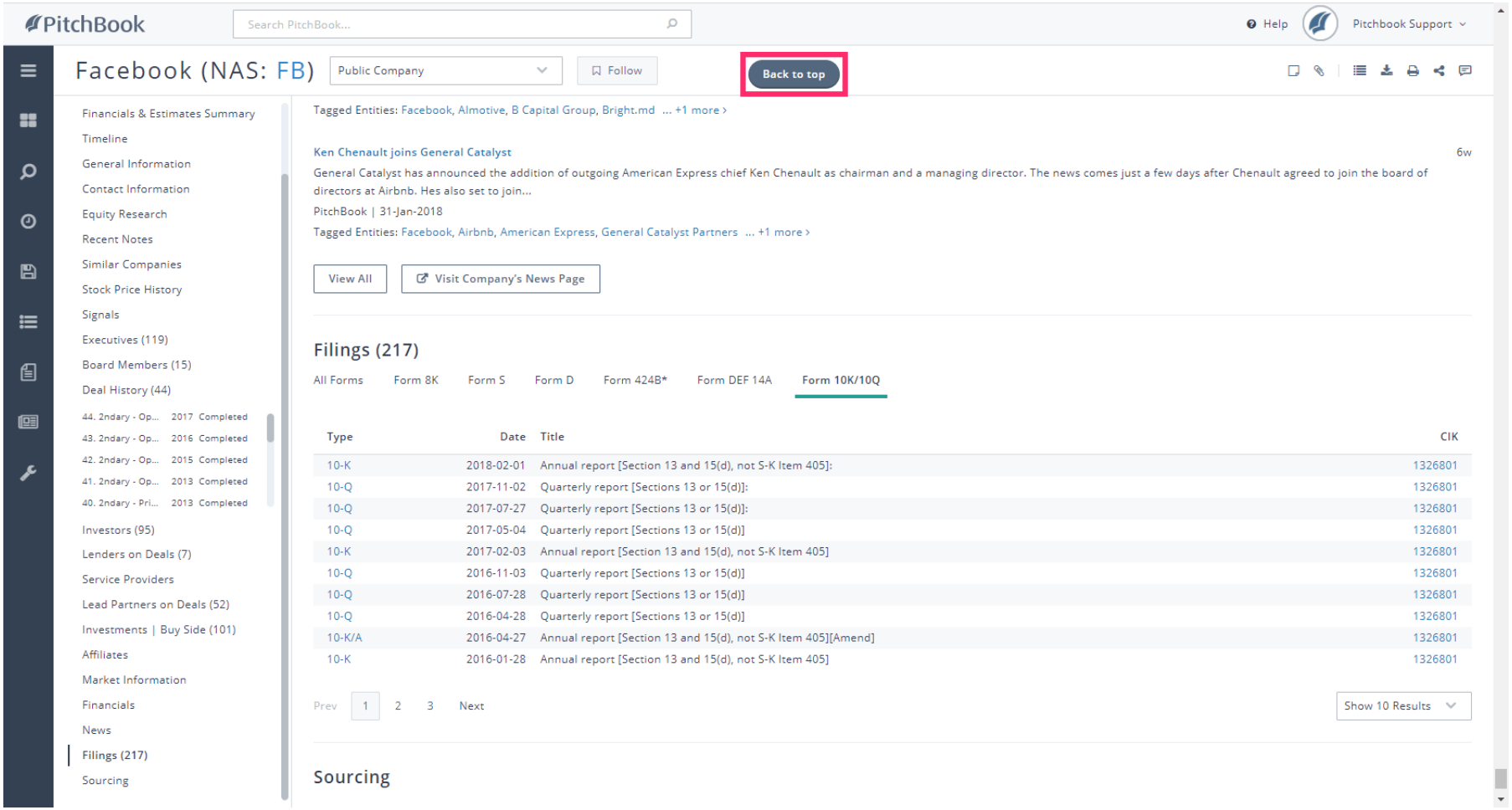
The Filings section contains various company filings including their Form Ds, S1s, 10-Qs, and 10-Ks. You can click on any of the filing types to open up a new tab and view the actual report from within your browser.



Viewing a Company Profile

PitchBook Data

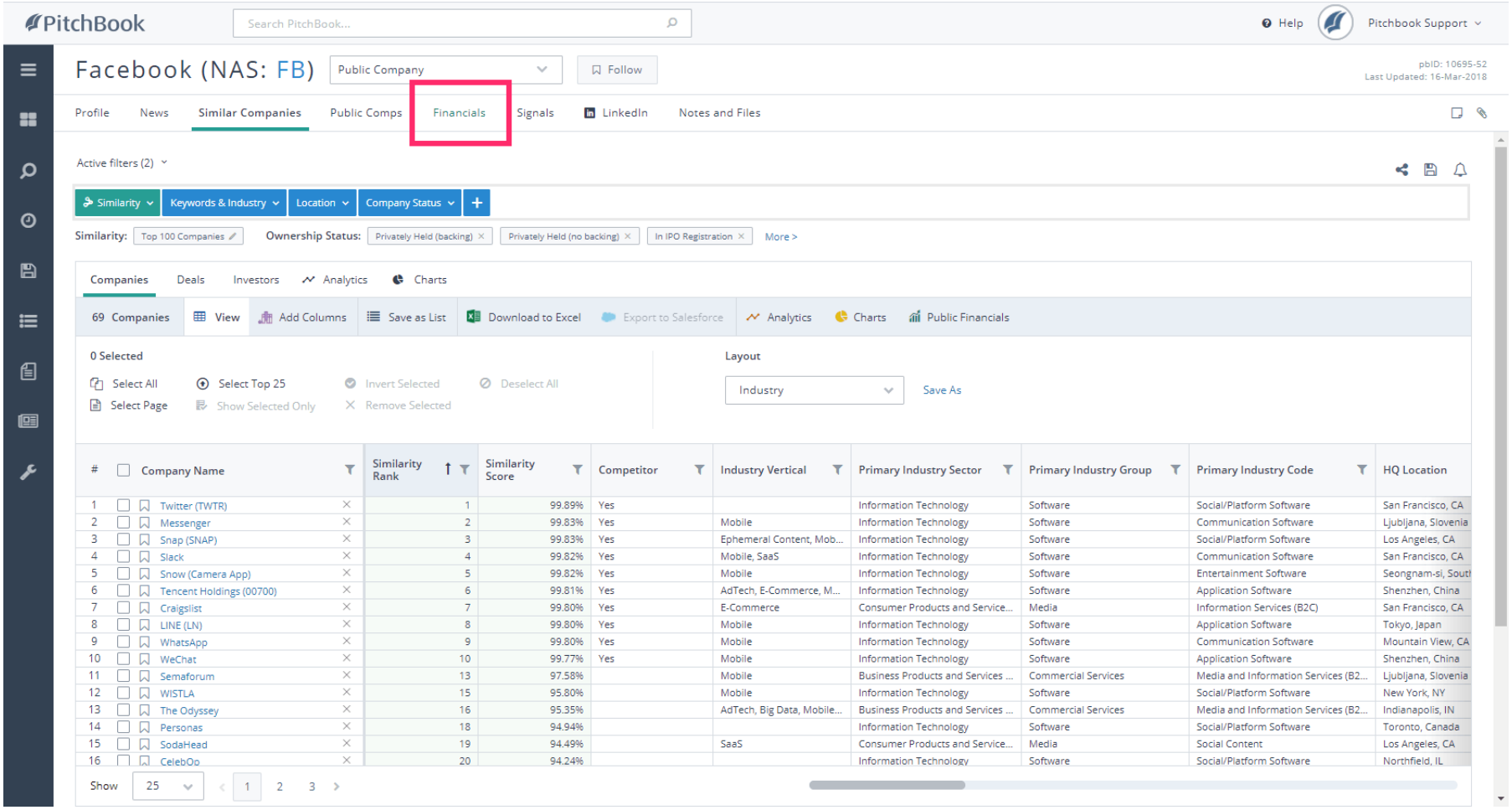
Now that we've finished browsing the Profile tab, let's take a look at some of the others. Click Back to top



Viewing a Company Profile

PitchBook Data

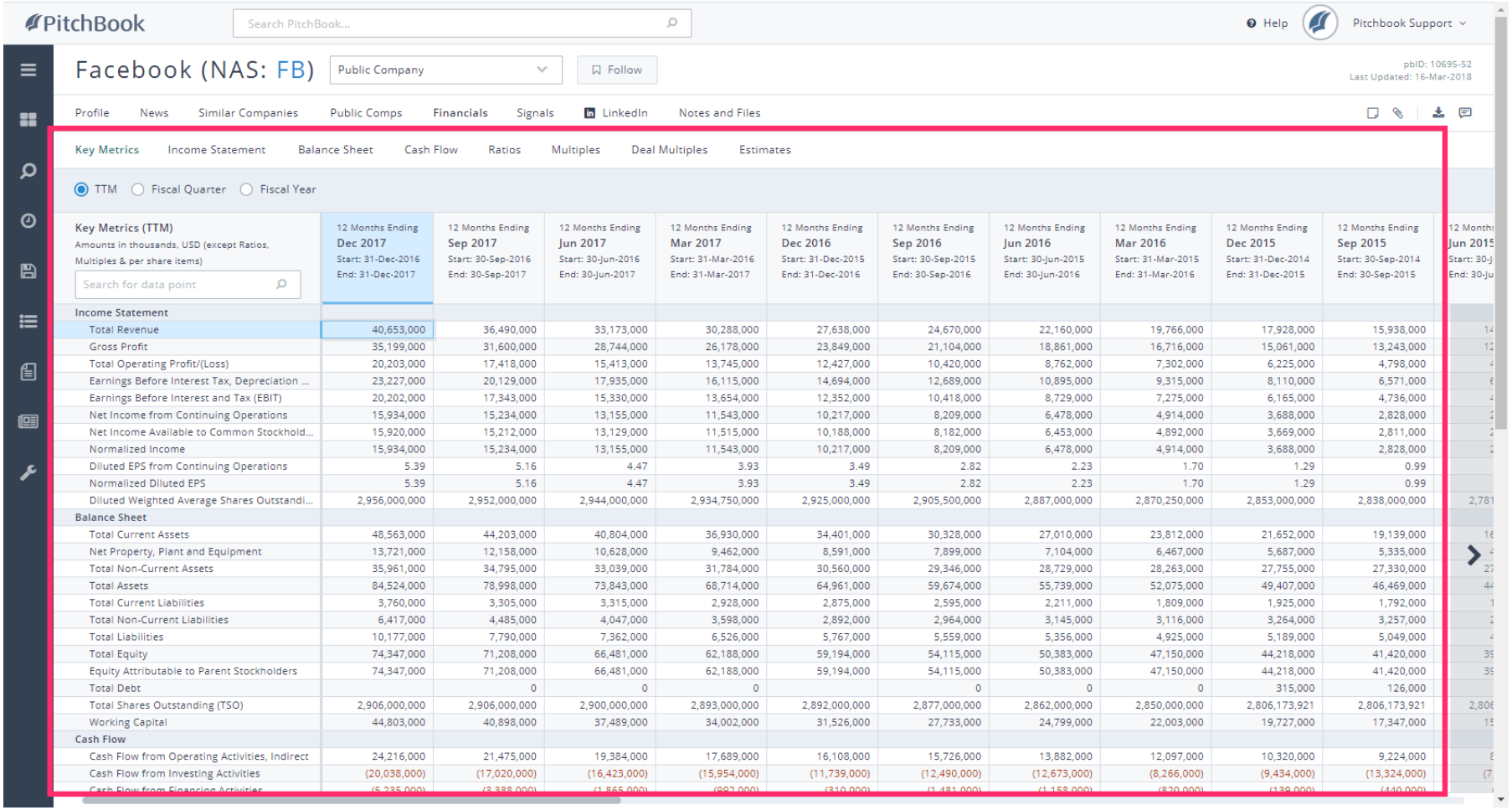
Click Financials



Viewing a Company Profile

PitchBook Data

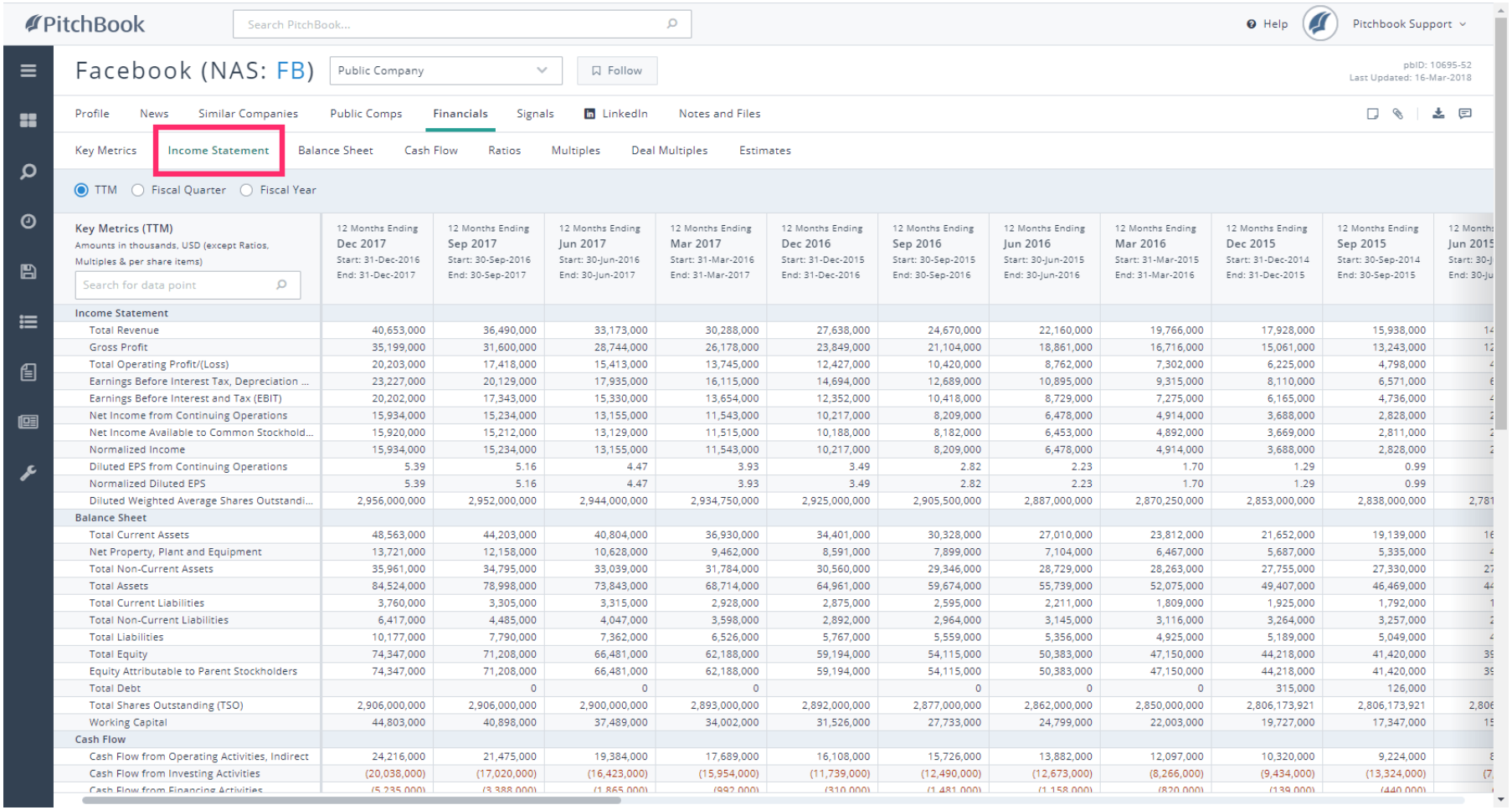
The Financials page allows you to view a company's financial history. You'll be able to look at key metrics from the company's Income Statement and Balance Sheet like their Revenue, EBITDA, Total Assets, Total Debt, etc.



Viewing a Company Profile

PitchBook Data

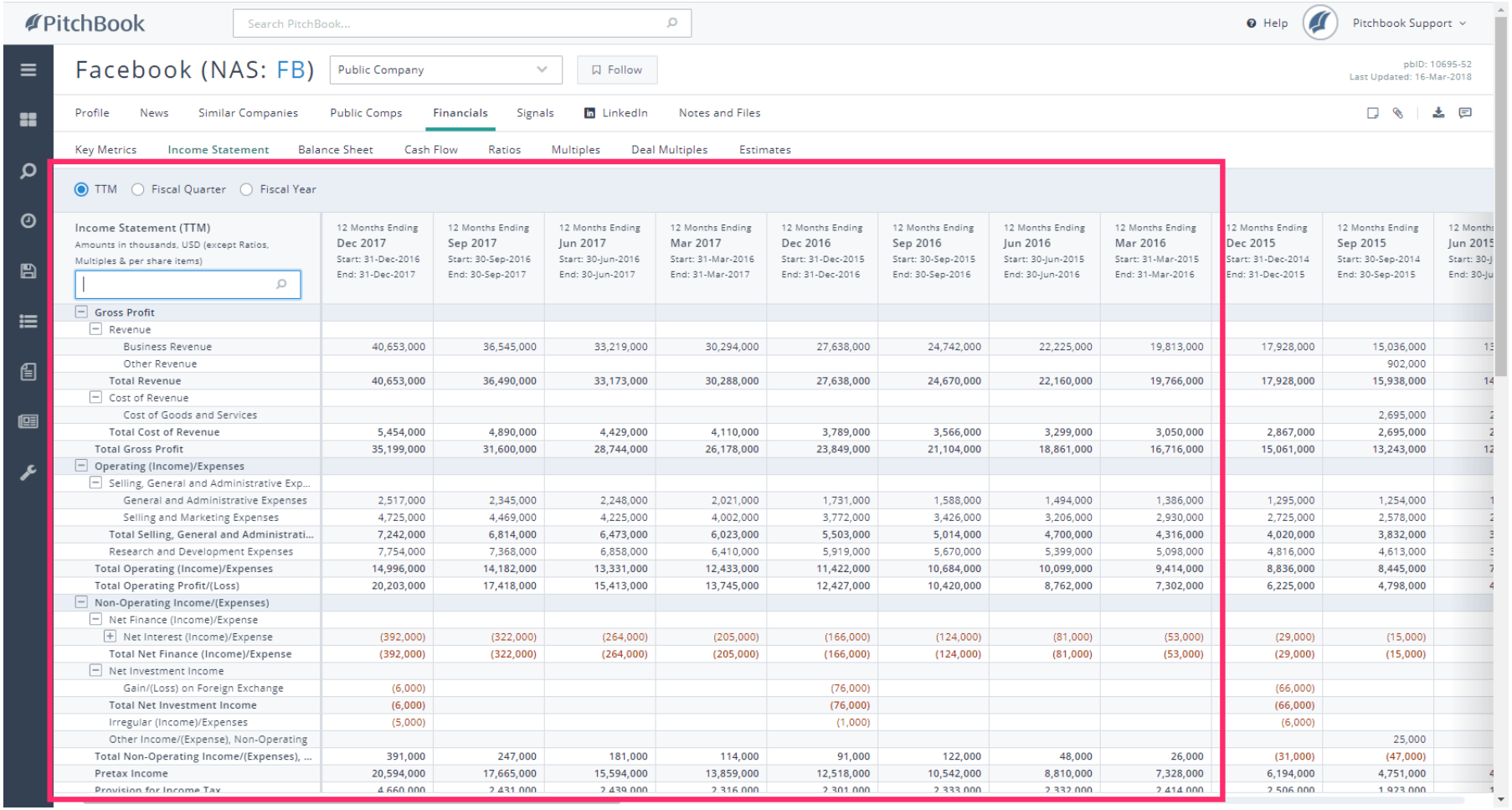
You can use the available tabs to get a more in-depth look at a particular set of financial data. Click Income Statement



Viewing a Company Profile

PitchBook Data

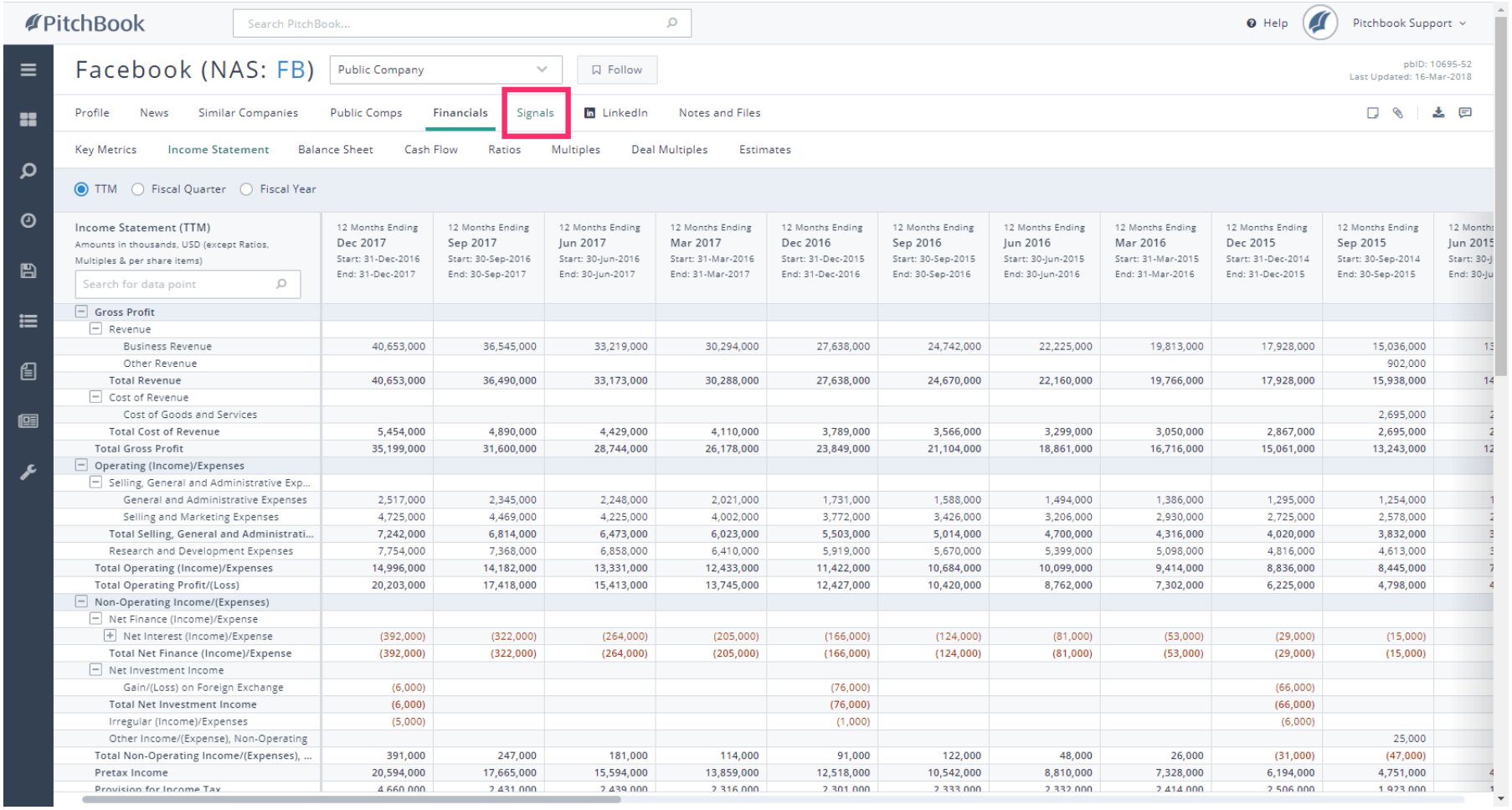
In this view, we can see how each financial data point was derived. You can also use the Search Bar found on the left-hand side to search for any particular metric across all of the tabs.



Viewing a Company Profile

PitchBook Data

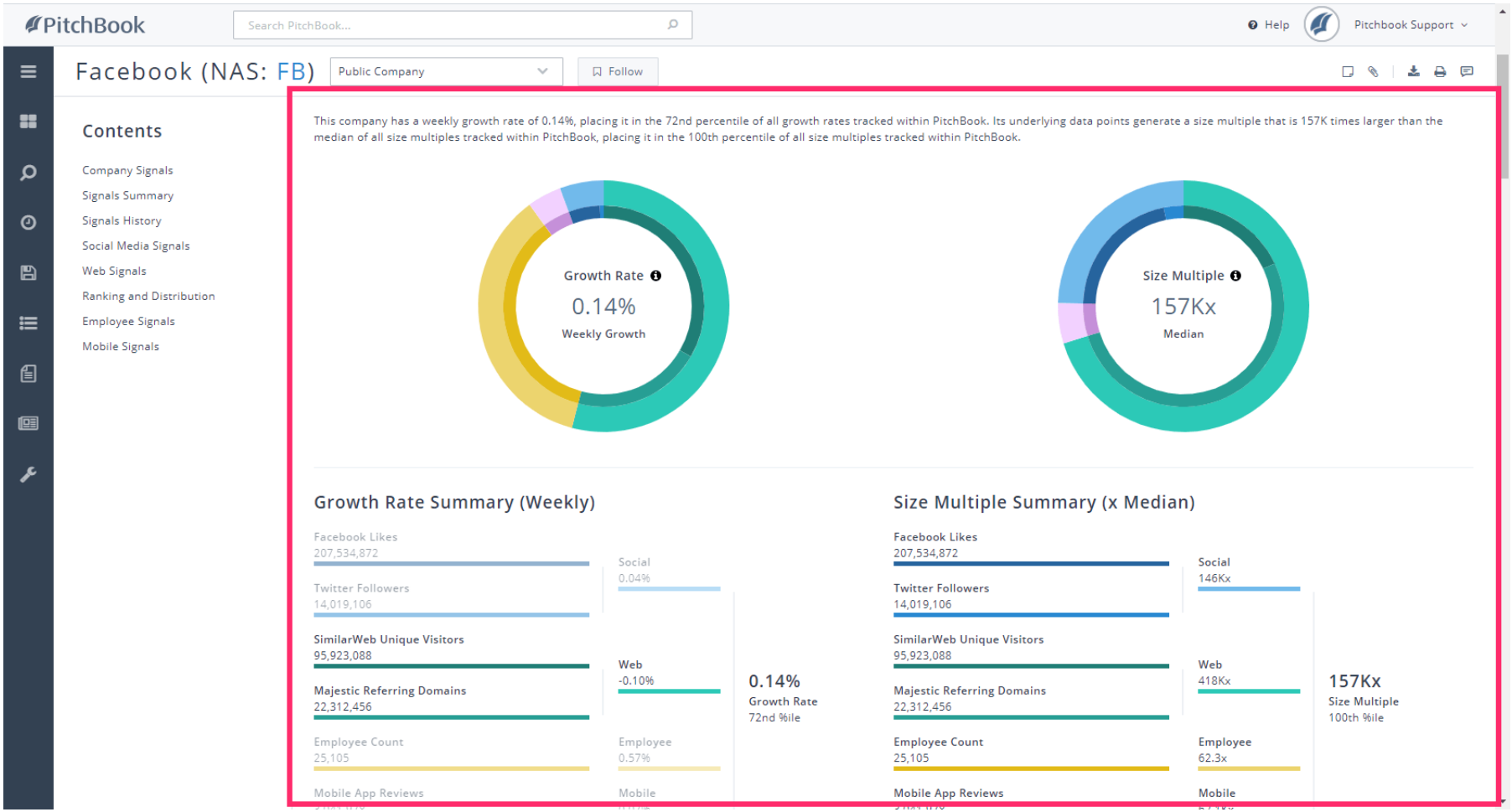
Click Signals



Viewing a Company Profile

PitchBook Data

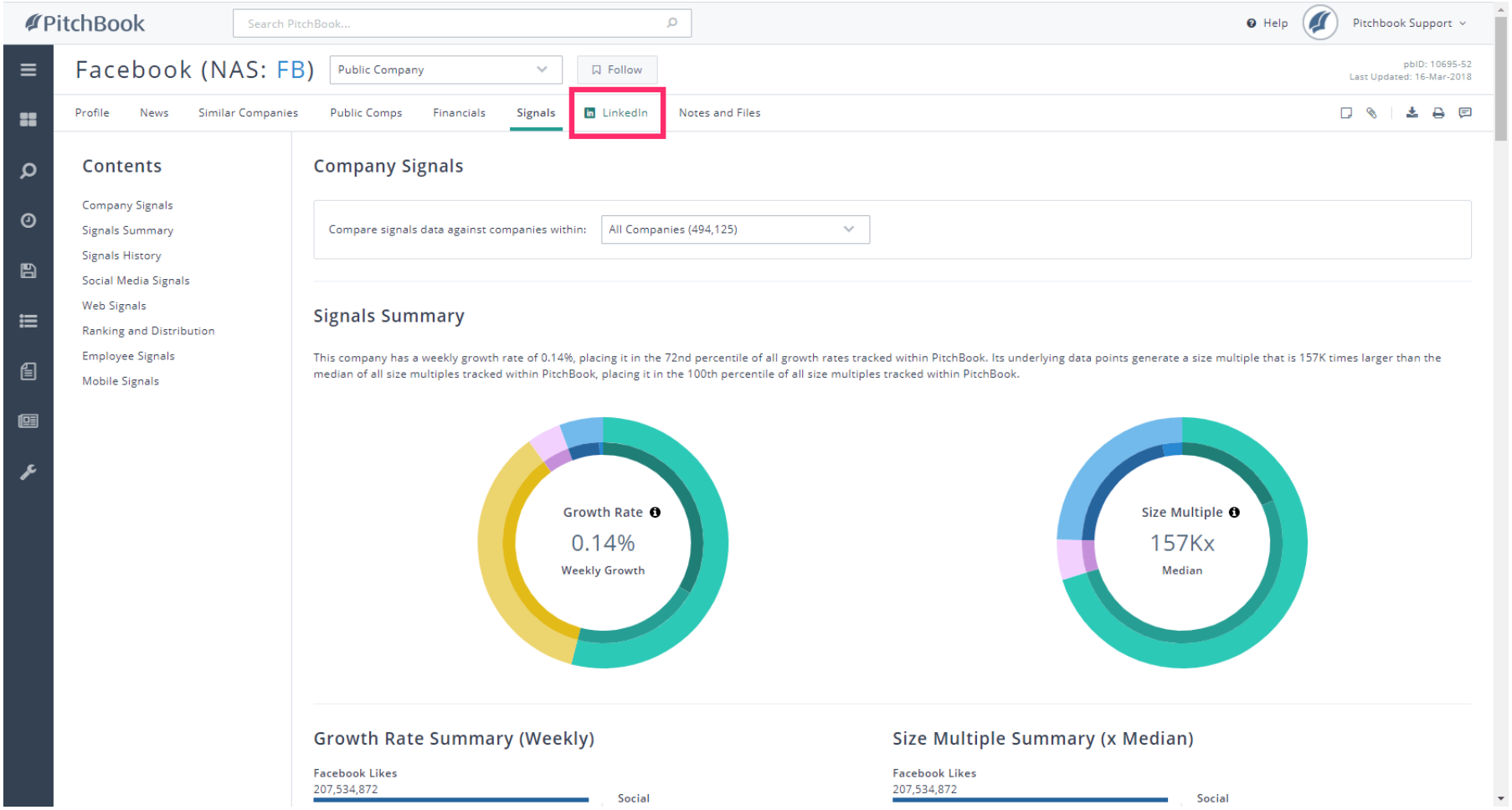
Signals are a set of non-financial metrics that measure a company's web traffic, social media presence, and employee growth. This page allows you to see a breakdown of how their Growth Rate and Size Multiple signals were calculated.



Viewing a Company Profile

PitchBook Data

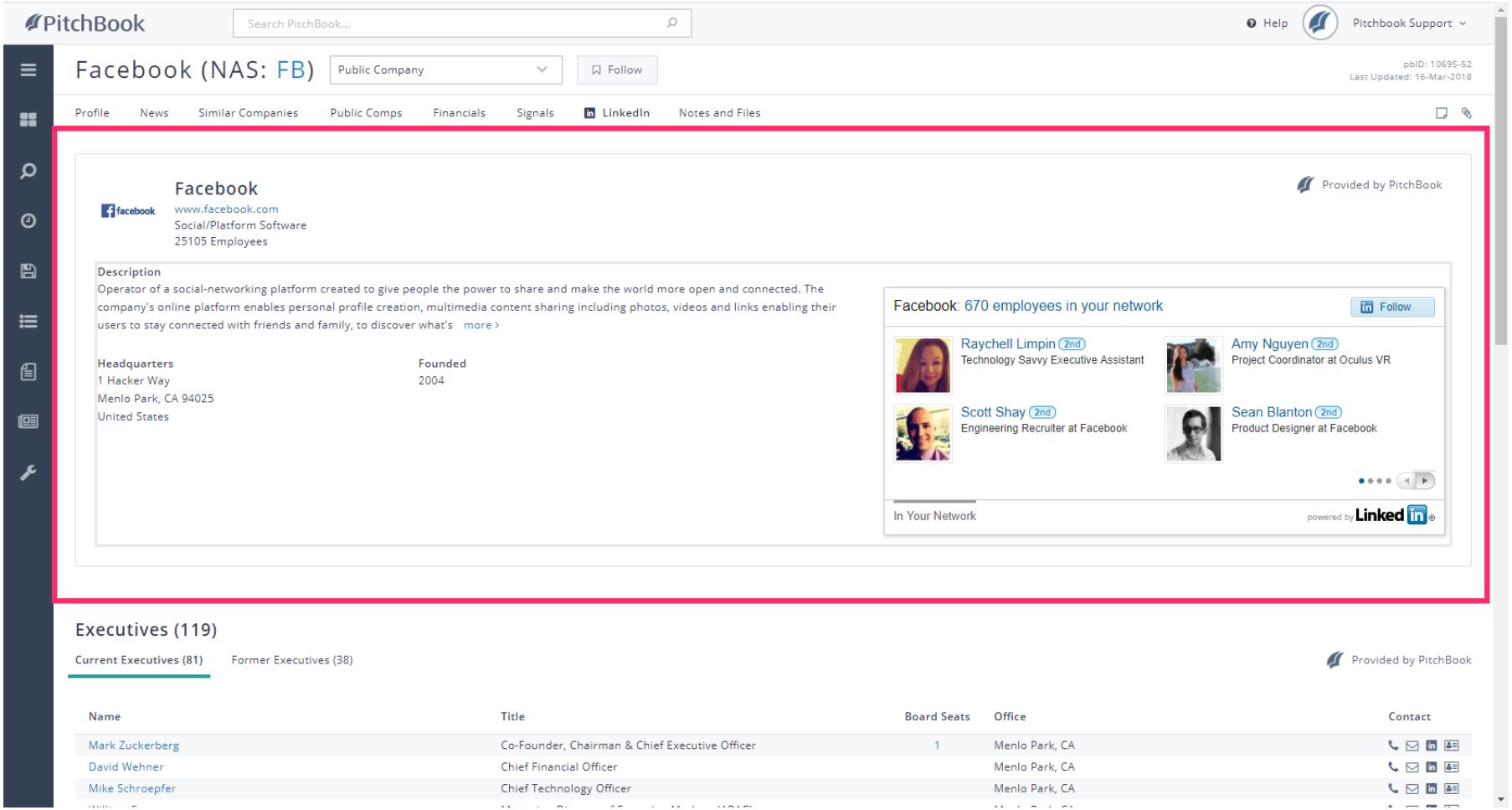
Click LinkedIn



Viewing a Company Profile

PitchBook Data

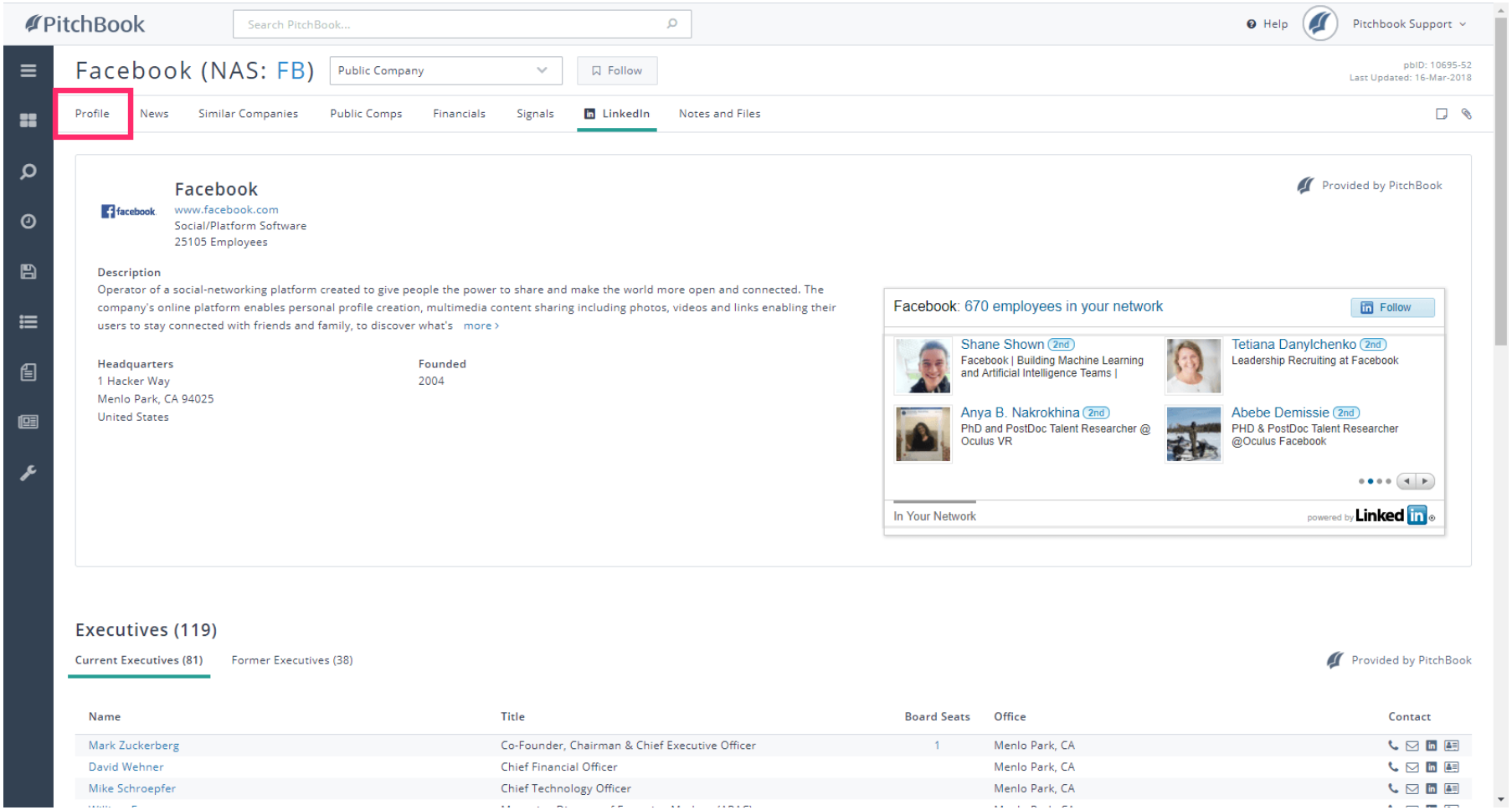
The LinkedIn tab contains a window into the company's LinkedIn web page. You can also continue down the page to see the list of professionals from the company, and click through to see their individual Person Profile.



Viewing a Company Profile

PitchBook Data

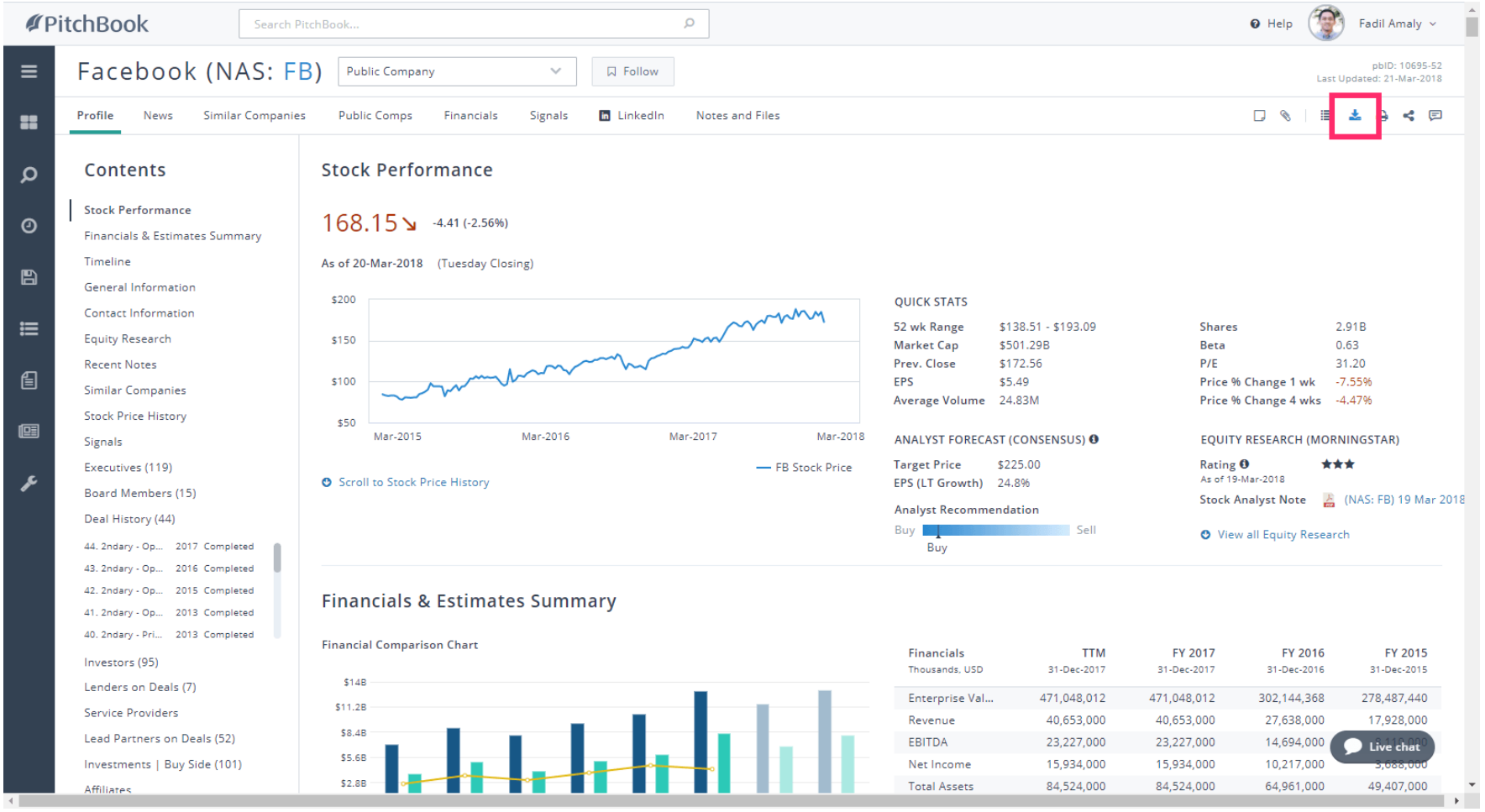
Now that we've explored some of the main tabs, lets see how to can download some of the company's data from the platform into an Excel or PDF format. Click Profile



Viewing a Company Profile

PitchBook Data

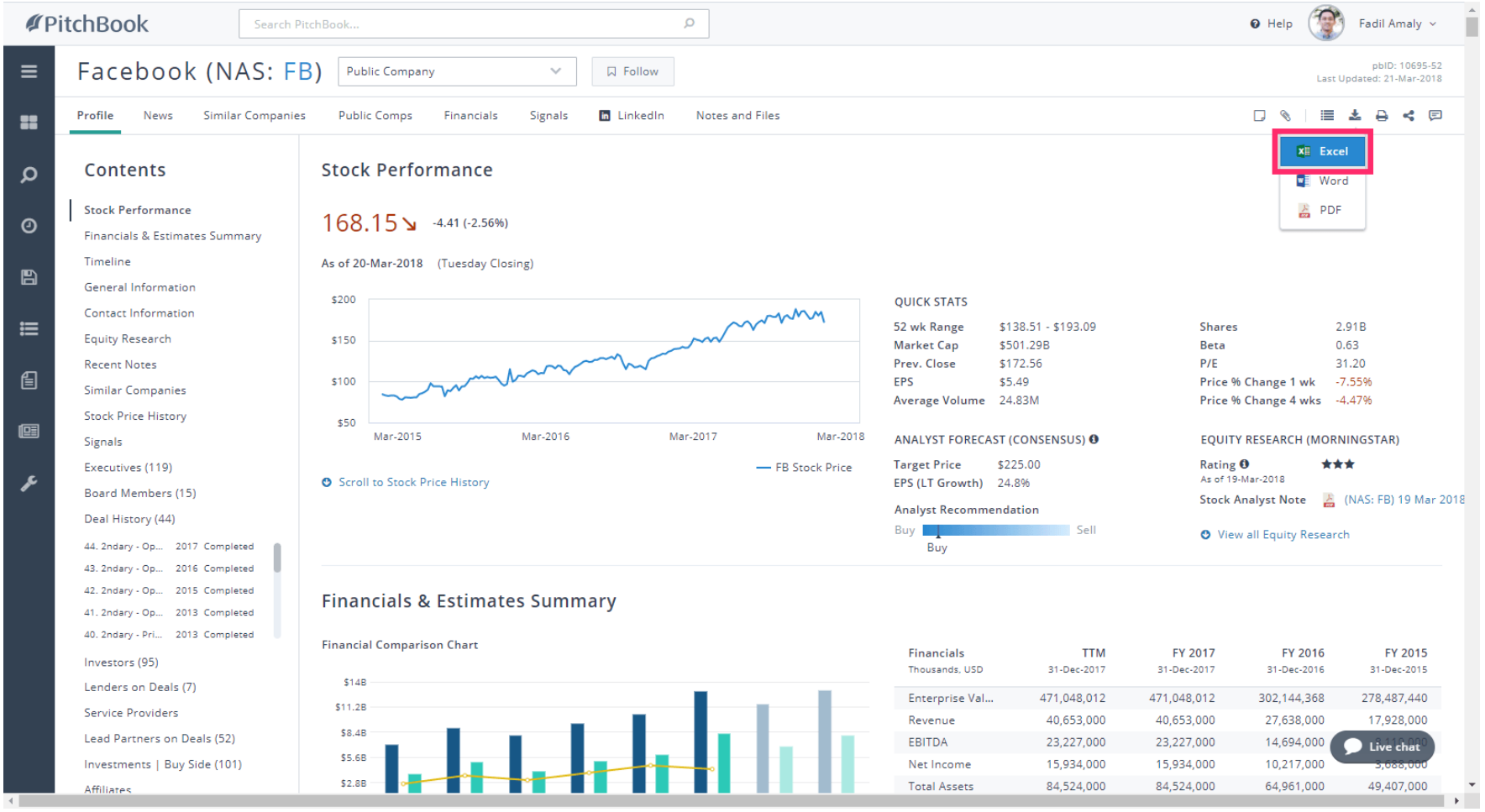
Click the Download button



Viewing a Company Profile

PitchBook Data

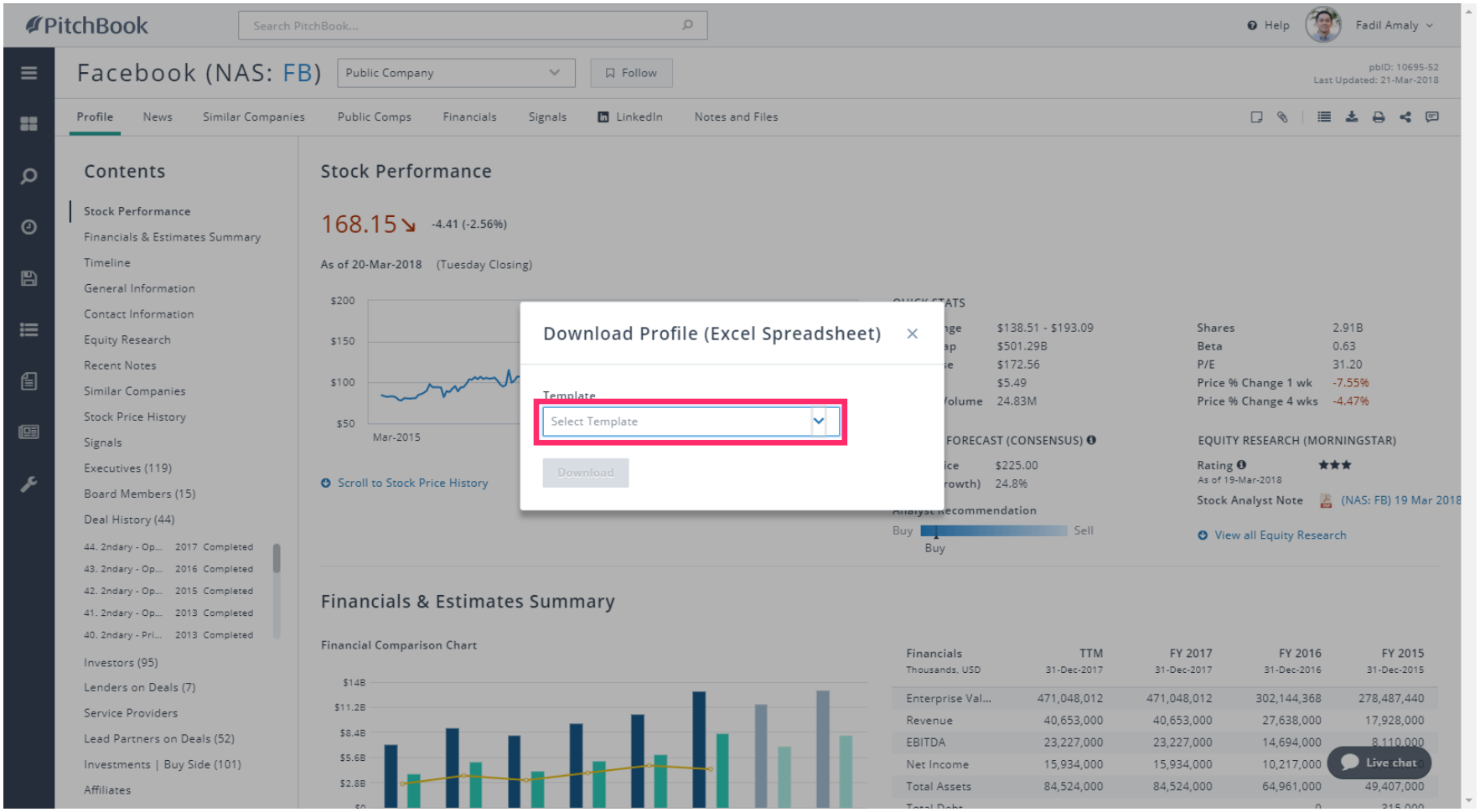
Click Excel



Viewing a Company Profile

PitchBook Data

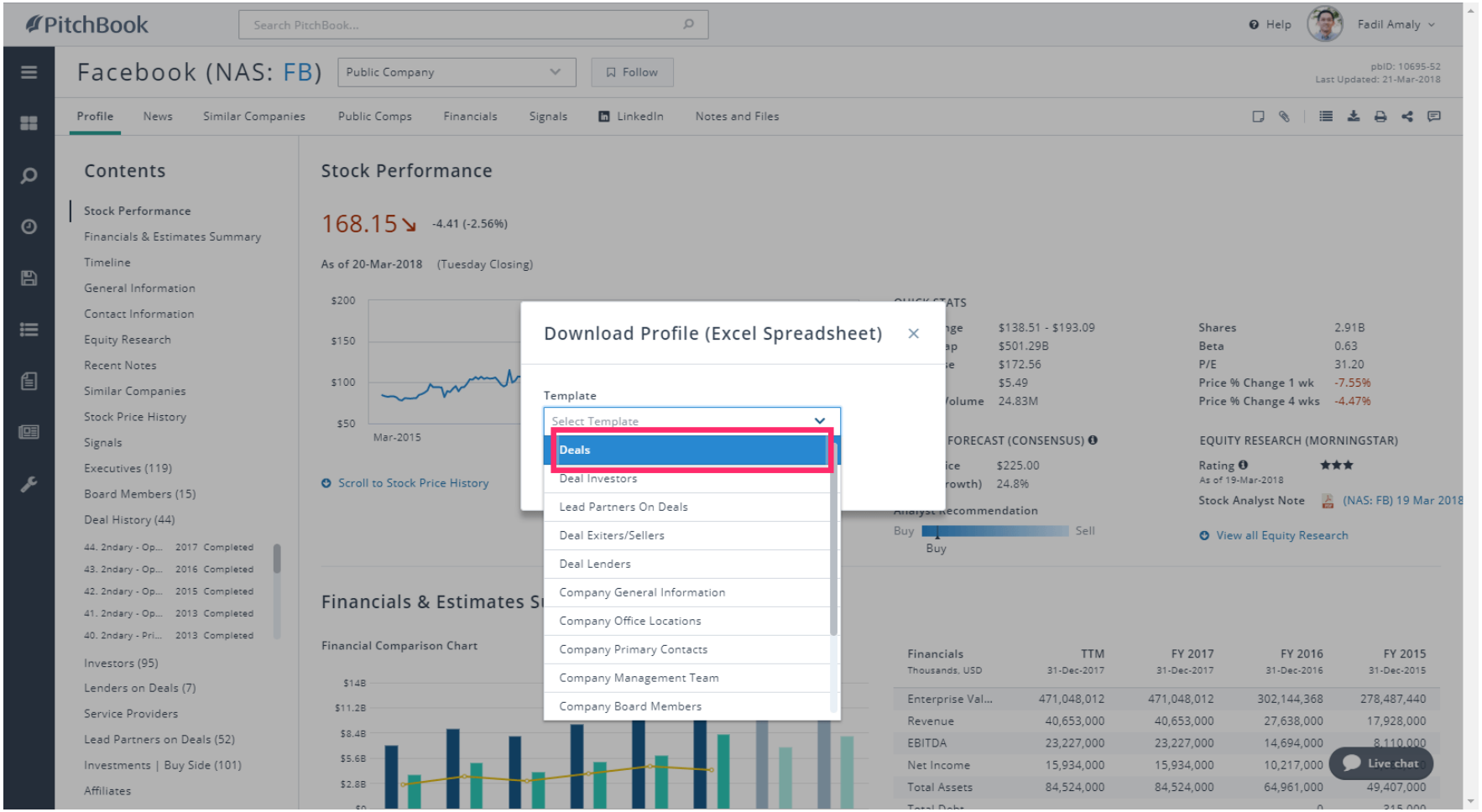
Click Select Template



Viewing a Company Profile

PitchBook Data

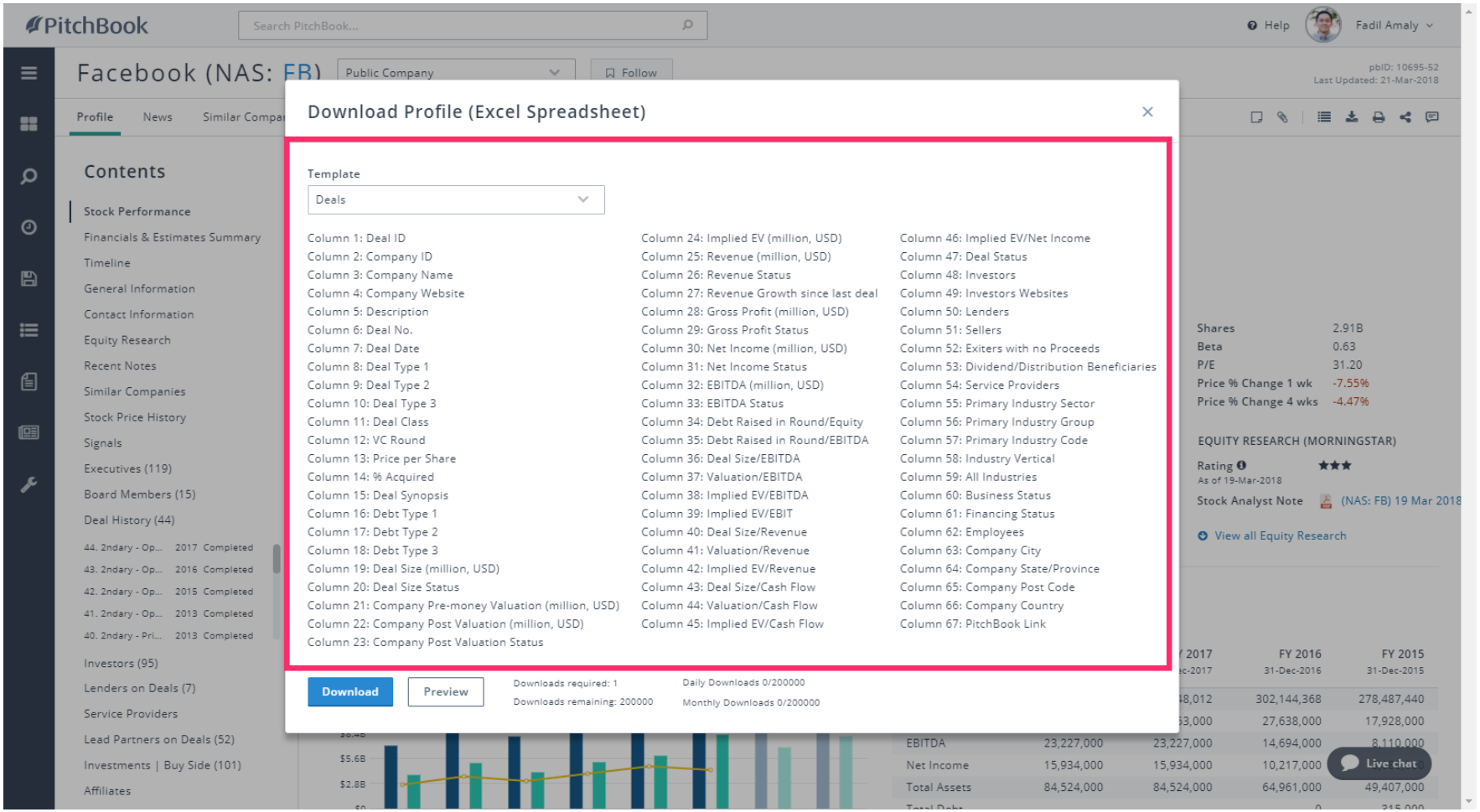
Each of the available templates will contain a different set of data points related to the company. Click Deals



Viewing a Company Profile

PitchBook Data

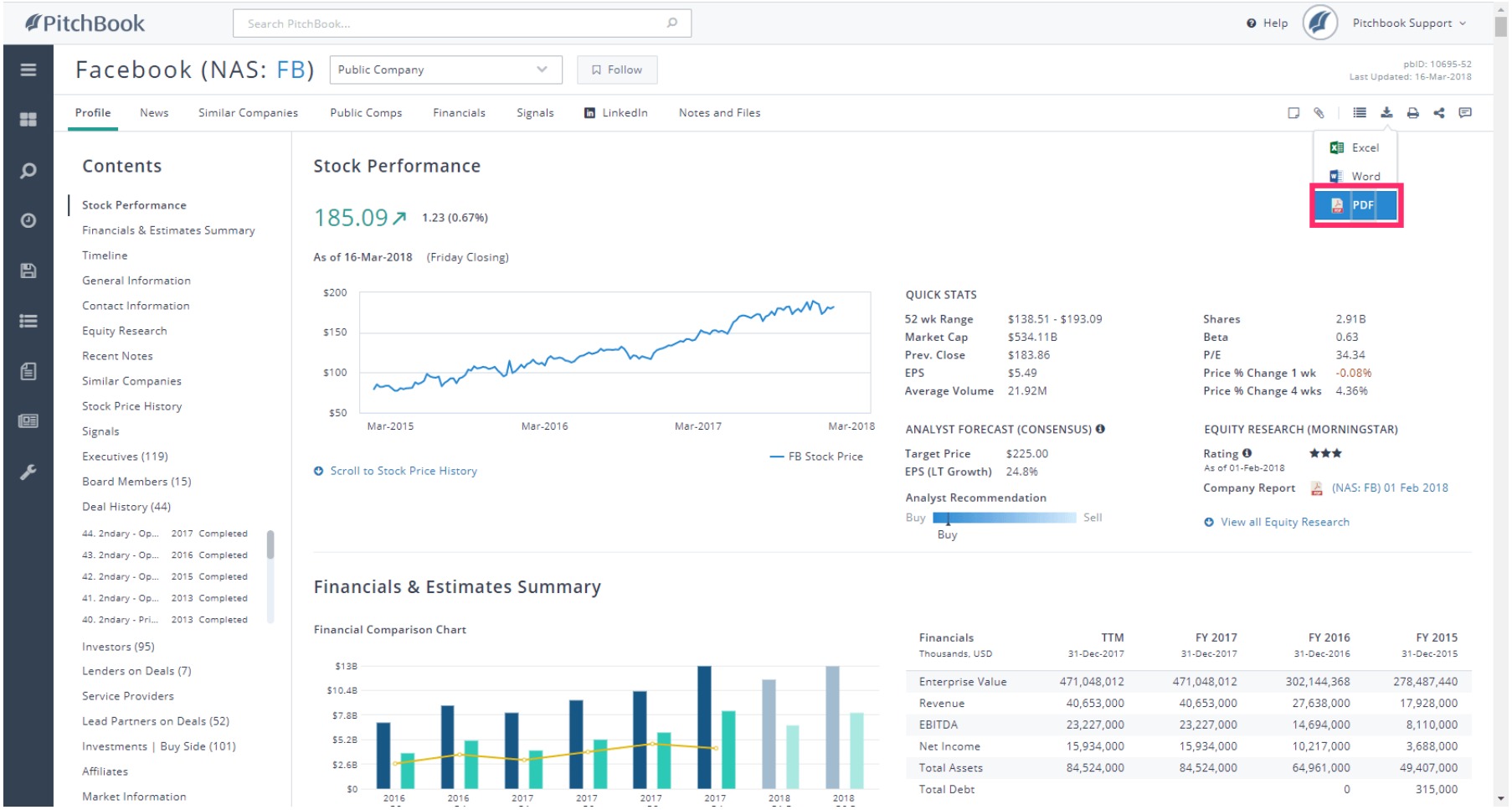
This window lists all of the data points that would be downloaded through this template. This template would export the company's entire deal history including details on every deal such as the deal type, size, valuation, multiples, and more.



Viewing a Company Profile

PitchBook Data

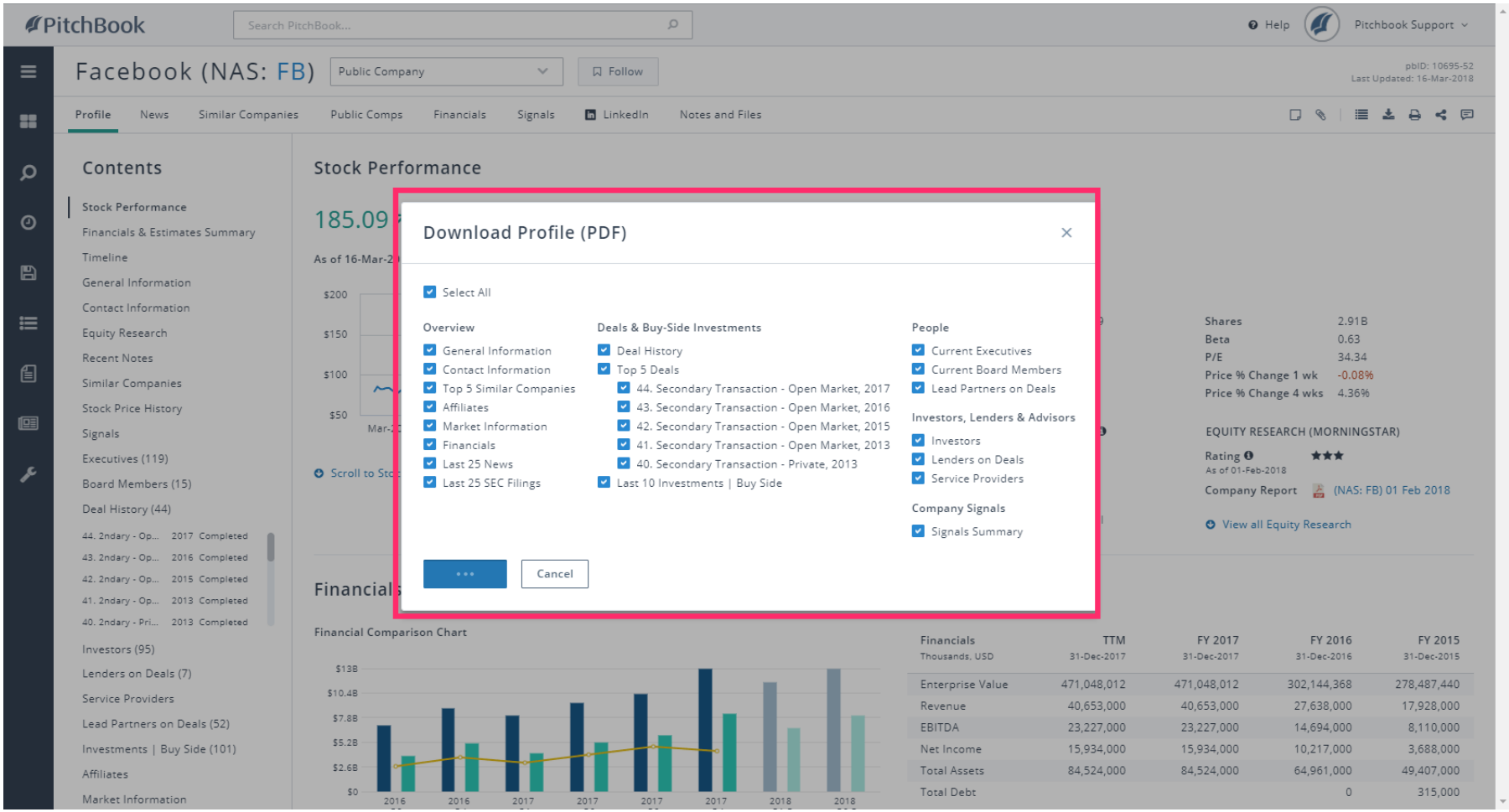
Another option is to download the data as a PDF file. Click PDF



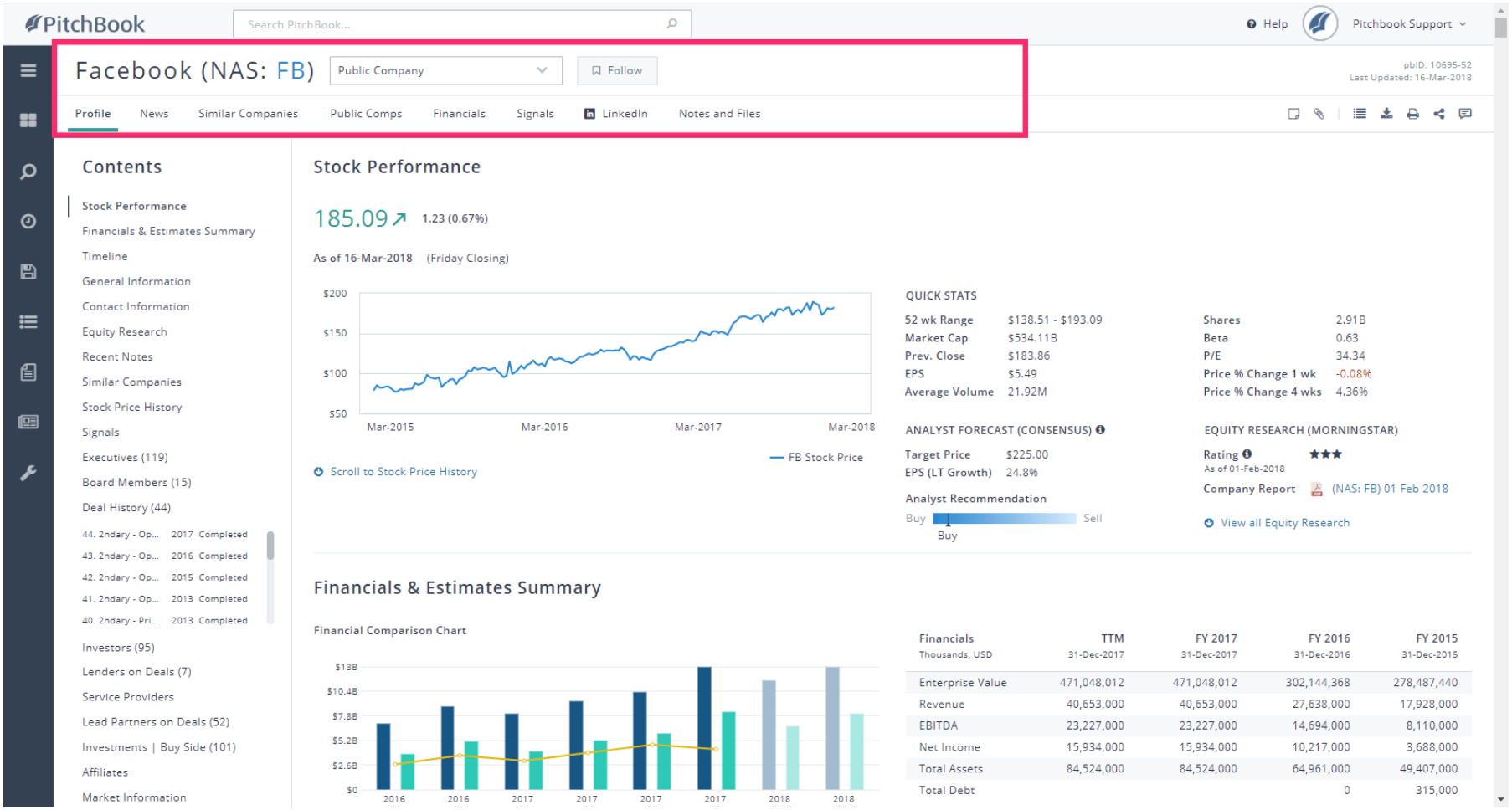
Viewing a Company Profile

PitchBook Data

From the Download Profile menu, you have more control by being able to manually select which data sets you want to export. The PDF download option is great for getting a customized summary on the company by downloading key pieces of information.



Viewing a Company Profile

PitchBook Data

Now you know all of the main features and data sets that can be found within a Company Profile.