Chapter 5
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 both the COMPUSTAT (North America) and COMPUSTAT (Global) databases. We've made it easy for you to modify these charts by 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
- modify pre-defined charts
- create your own charts

Note: The procedures in this chapter use the Money Management default style. To change your style to Money Management, select **Options** from the **Tools** menu, select the **Style** tab, select the **Money Management** style and click **Set Active Style**.

Using Pre-defined Charts

Research Insight gives you the flexibility to evaluate your target companies using a variety of pre-defined charts. Here is how to run a 5 Year Total Return to Shareholders chart for Merck & Co.

Begin from the Research Insight desktop.

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

2. Open the **Market** folder, and select **5 Year Total Return to Shareholders**.
3. Click **Finish**.
   You will see the Run Assistant window.

4. Enter the ticker symbol **mrk** (Merck & Co.) in the **Companies** field and click **OK**.

A 5 Year Total Return to Shareholders chart appears 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. To open another chart, click the (**Open Chart**) icon on the desktop. To change your initial set or modify your base set and criteria, click the (**Run**) button.

Running a Pre-defined Chart for Multiple Companies

Now let's say you want to look at a 5 Year Total Return to Shareholders chart on companies in the S&P 500 with the same SIC Code as Merck & Co. Follow the steps in the previous example, except in the Run Assistant window

1. Enter **mrk** in the **Companies** field.
2. Highlight **SIC** in the Find Similar Companies list.
3. Click **Change Set** to display the Initial Set dialog box.

4. Enter **$SP_500** in the **Set** field and click **OK**.

Hint: If you don't know the name of a specific set, click the **Look Up** button, select a set, click **Paste**, then click **Close**. The set name will be inserted in the **Set** field.

5. Click **OK** again. A 5 Year Total Return to Shareholders chart appears for the first company.

Hint: To view this chart for the other companies, click the ticker symbol 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.

Modifying a Pre-defined Chart

When a pre-defined chart is displayed on your screen, you can use the Chart toolbar at the top of the screen to modify how the chart is displayed. You can use the previous example for running a pre-defined chart on multiple companies.

1. Click the (**Change Gallery Type**) button from the Chart toolbar and select **Columns** to display the chart in a column format.
2. Click the (**Switch between 3D and 2D Views**) button to view the chart in 3D.
3. Click the (**Horizontal Grid**) button to remove the grid.
   Your chart should now look like this:

Creating Your Own Charts

With Research Insight you can quickly create your own custom charts using the Chart Assistant. 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. The following example shows you how to create a bar chart comparing credit worthiness information for Ames Dept Stores, Target Corp., K Mart Corp. and Wal-Mart Stores.

Begin from the Research Insight desktop.

1. Click the (**Chart Assistant**) button.
2. Click the **Bar** radio button in the Chart Style area.
3. Click the **Multiple Companies** radio button in the Companies per Chart area.
4. Click the **Current Period** radio button in the Periods area, and click **Next**.

5. Click the **Credit Worthiness** radio button from the Item Groups area.

Hint: If the radio buttons you need are not displayed, click **Customize** and select the items you need from the Item Group category. Click **OK**, and choose whether or not to save your changes.

6. Click the **Add All** button in the middle of the window to move all the Credit Worthiness items over to the Selected Items area, and click **Finish**.
7. In the Run Assistant window, enter the companies' ticker symbols (**ames,tgt,km,wmt**) separating each with a comma.
8. Click **OK**. Your custom chart will appear on the screen.

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. To view the report and chart at the same time, click the **Report & Chart** radio button. To change your initial set or modify your base set and screening criteria, click the (**Run**) button to open the Run Assistant window. To select different items to appear in the chart, click the (**Rerun Assistant**) button or select Rerun Report/Chart Assistant from the report menu.