

Thomson One Banker: Deals

INTRODUCTION

Thomson One Banker is a powerful financial analysis database providing a wide range of data for on internationally quoted companies. The deals module provides data on more than 400,000 global mergers and Acquisitions (M&A deals), more than 80,000 global equity transactions, including IPOs, more than 260,000 global fixed income deals, and deals on syndicated loans and project finance. Use Thomson One Banker deals module to:

- Analyse company/market mergers & acquisitions activity
- Analyse company/market equity deals activity
- Analyse company/market bond and loan deals activity

In addition to deals, Thomson One Banker has modules that provide data on company analysis, ownership, and private equity.

ACCESSING THE DATABASE

- Thomson One Banker can be accessed via the Electronic Resources section of the MBS Library Website:

<http://www.mbs.ac.uk/library>

- Select "**Databases**", "**Company Information**" or "**Databases**", "**Mergers and Acquisitions**"
- A **special** username and password is required to log into the database. Follow the special username and password link and log into the library's database username and password page. (Note: requires University login)

Note Thomson One Banker is designed to work with the Internet Explorer browser (Version 6 or higher) and may not work with other browsers such as Firefox.

SEARCHING THE DEALS DATABASE

The Deals Analysis model gives a common interface for doing searches for different categories of deals: M&A, Equity, Bonds, Loans. These deals are kept separate because the information collected, and therefore what you can search on and retrieve, varies between the categories. However, the basic process of making a deals search is the same. There are 5 key steps:

1. Choose your deal category
2. Select your search criteria to identify deals of interest
3. Select your report format
4. Execute your search
5. Browse and download results

Thomson One Banker is designed for corporate users doing small to medium searches, not for researchers who want to search and download large amounts of data. There are restrictions on the downloading of deal search results into Excel, so you may have to repeat a search, e.g. for a number of different time periods, to get all the data that you require.

SEARCH FOR MERGERS & ACQUISITIONS DATA

Using M&A Deals Search

Use this option to analyse the M&A market or search for all deals by company/industry



- Select "**Deals Analysis**" Tab (from Left-hand side) and **M&A** folder.
- Search Library will display latest deals data by a number of pre-defined searches. Use either Basic Search or Advanced M&A Search for a customised search.

Tip: M&A Overview is designed for people working in mergers and acquisition who are interested in keeping up to date with the volume of deals by sector and region.

Basic Deals Search: Search by a number of pre-defined search menus for deals from 2007


- Select Announced/Completed Date and complete date range
- Enter required search details in the company criteria/deal criteria boxes
- **Note:** you must use the “look up” option to enter search terms. For example, select the magnifying glass next to Company Name, enter company name in search box eg: Tesco, choose Tesco Plc from the matching names, select “Add” and then select “OK” to apply this new criteria to the search.
- Select the “View Results” tab
- A list of deals will be displayed.

Advanced Deals Search: Search over a wide range of company/deal criteria

- The database “All Mergers & Acquisitions” is selected as the first search criteria
- Expand the entries in the “Item List” to define search terms, or use the “Item Search” tab to search for an item by its definition. Enter search terms as prompted and “Apply to search”, continue until all search options required have been completed.
- You will normally enter at least one company criteria (name, sector, geographic region) and one date criteria.
- Select “Execute Search” and the “Count” column will now give the number of deals as the search criteria refine the search.
- Depending on your number of results you may decide to refine your search criteria.
- Note there will be no data in the “Results” tab unless you have selected a “Report”, “Ranking” or “Analysis” in the “Open/Create” section. You can start with the Standard: Deal Basics Report. Your report is added as a final search criteria
- Select “Execute Search” and you are automatically taken to the “Results” tab to view matching deals.
- Select the report icon  to view fuller deal data or select the excel icon  to download as a spreadsheet.

Find Deals using Company Information Search

Use this option to quickly view latest deal data

- Conduct a company search in the company analysis module.
- Select the “Deals” tab in the main screen. The latest deals will be displayed. These are divided into sections: *M&A deals*, *Equity deals*, *Bond deals*, and *Loan deals*.
- Select the report icon  for further deal details.

SEARCH FOR EQUITY DEALS DATA

Using Equity Deals Search



Use this option to analyse the Equity deals market or search for all deals by company/industry

- Select “Deals Analysis” Tab (from Left-hand side) and *Equity* folder.
- Search Library will display latest deals data by a number of pre-defined searches. Use either Quick Search or Advanced Equity Search for a customised search.

Tip: You can also start a deals search from the “Screening & Targeting” Tab (from Left-hand side) and *Deals* folder. Advanced Search allows you to select which deals database.

Advanced Equity Deals Search: Search over a wide range of company/deal criteria

- The equity deal databases are selected as the first search criteria
- Expand the entries in the “Item List” to define search terms, or use the “Item Search” tab to search for an item by its definition. Enter search terms as prompted and “Apply to search”, continue until all search options required have been completed.
- You will normally enter at least one company criteria (name, sector, geographic region) and one date criteria.
- Select “Execute Search” and the “Count” column will now give the number of deals as the search criteria refine the search.
- Depending on your number of results you may decide to refine your search criteria.

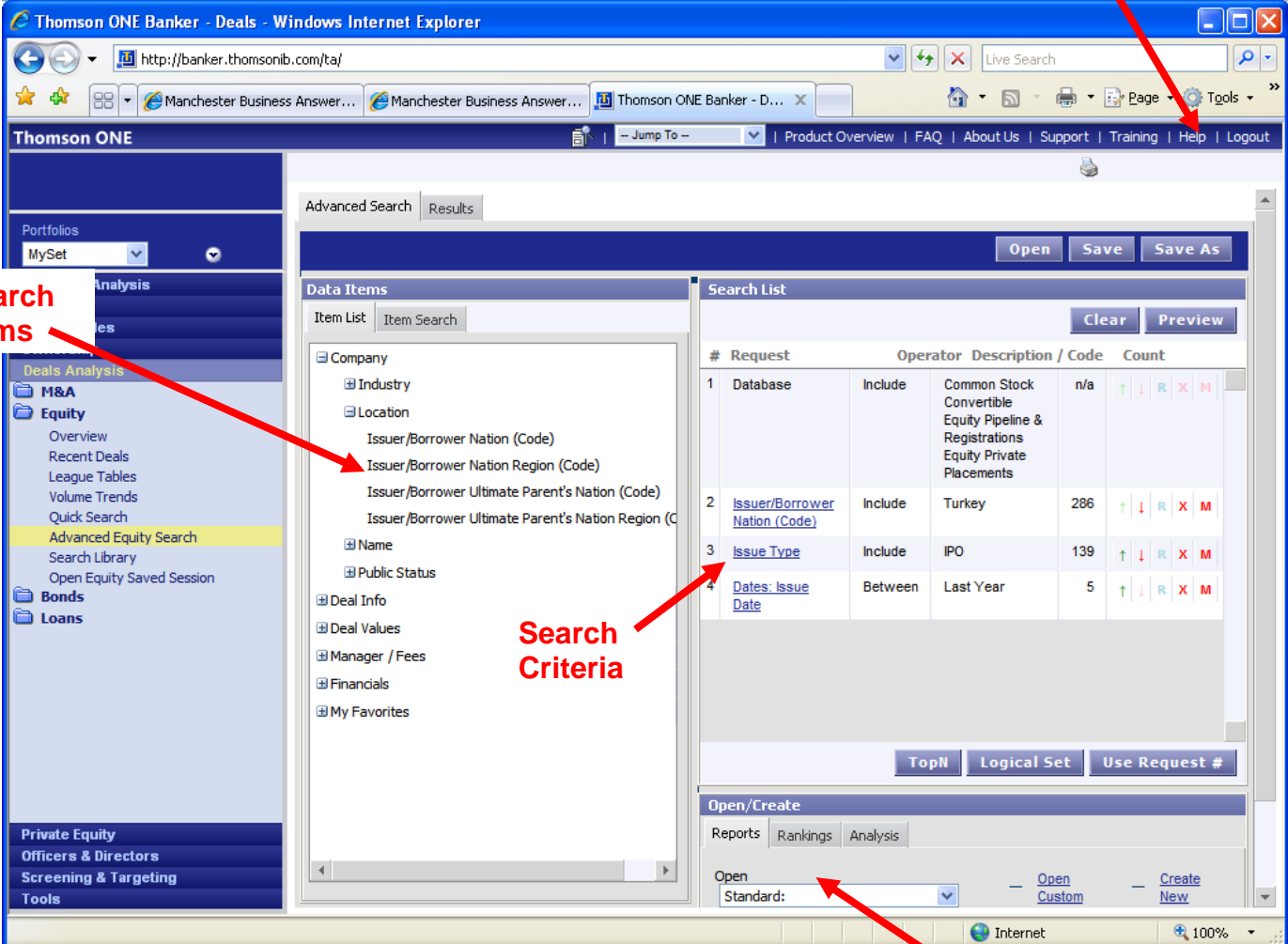
- Note there will be no data in the “Results” tab unless you have selected a “Report”, “Ranking” or “Analysis” in the “Open/Create” section. You can start with the Standard: Equities Comprehensive Report. Your report is added as a final search criteria
- Select “Execute Search” and you are automatically taken to the “Results” tab to view matching deals.
- Select the report icon  to view fuller deal data or select the excel icon  to download as a spreadsheet.

Tip: To search for IPO deals, include (Deal Info) *Issue Type is IPO* in your search criteria.

SCREENSHOT

The following screenshot shows an equity deal search.

Online Help



The screenshot displays the Thomson ONE Banker interface in a Windows Internet Explorer browser. The browser address bar shows <http://banker.thomsonib.com/ta/>. The page title is "Thomson ONE". The interface is divided into several sections:

- Left-hand navigation menu:** Contains sections for "Portfolios", "Analysis", "Deals Analysis" (with sub-items like M&A, Equity, Bonds, Loans), "Private Equity", "Officers & Directors", "Screening & Targeting", and "Tools". A red arrow labeled "Search Items" points to the "Advanced Equity Search" option.
- Advanced Search Results:** The main content area is split into two panes. The left pane, titled "Data Items", lists search criteria categories such as Company, Location, Name, Deal Info, Deal Values, Manager / Fees, Financials, and My Favorites. A red arrow labeled "Search Criteria" points to the "Company" section.
- Search List:** A table showing search results with columns for "# Request", "Operator", "Description / Code", and "Count". The table contains four rows:

# Request	Operator	Description / Code	Count
1	Database	Include Common Stock Convertible Equity Pipeline & Registrations Equity Private Placements	n/a
2	Issuer/Borrower Nation (Code)	Include Turkey	286
3	Issue Type	Include IPO	139
4	Dates: Issue Date	Between Last Year	5
- Open/Create Section:** Located at the bottom right, it has tabs for "Reports", "Rankings", and "Analysis". Below these tabs, there is a dropdown menu set to "Standard:" and buttons for "Open Custom" and "Create New". A red arrow labeled "Search Report (for results)" points to the "Open Custom" button.

Note: This is a test search – no report has yet been added.

SEARCH FOR OTHER DEALS DATA

Using Bond or Loan Deals Search

The basic form of these searches is the same as the Mergers and Acquisitions and Equity searches described above.

- Select “Deals Analysis” Tab (from Left-hand side) and required folder.
- Search Library will display latest deals data by a number of pre-defined searches. Use either Quick Search or Advanced Search for a customised search.

SAVING A DEALS SEARCH

Thomson One Banker also offers the opportunity to save a deal search, and to load a previously saved search. You can also define, save and re-use a deal search report format.

The facilities for saving and re-using deal search information can be a big help if you have to download a lot of data through a series of related searches, or if you wish to save the details and re-execute a search at a later date.

ADDITIONAL HELP

Online Help: Thomson One Banker has a detailed online help facility.

- Select the “*Help*” icon from the top right hand menu to display help contents

Try Manchester Business Answers 24/7 (www.mbs.ac.uk/247) for further advice on Thomson One Banker, including accessing Thomson Reuters customer support.

Manchester University also subscribe to the SDC Platinum database (another product from Thomson Reuters). This provides an older application interface to some parts of Thomson’s deals data. It does not have the convenience of the Thomson One Banker web interface, but it can be a useful alternative if you want to obtain large amounts of data.

Many of the deals are identified by a SDC Deal id, and companies by a 6-digit CUSIP. You may need to use an additional id (sedol, ds code) to link with other databases. See www.mbs.ac.uk/bizlib247 for details.

Other Thomson One Banker Resources

Company Analysis

Company Analysis is the core Thomson One Banker module providing company financials, filings and share prices and forecast estimates for over 80,000 quoted companies, from over 200 international exchanges worldwide.

The Company Analysis Excel Add-In tool pulls data directly into Excel from Thomson One Banker. The add-in provides dynamic search functions and customised analytical models can be created using over 2,000 data fields.

- Select “*Tools*” from left hand menu
- Select “*Office Tools*” and follow the download instructions provided in this section

Private Equity

The private equity module provides access to global data on venture capital firms, private equity investment deals and companies backed by venture capital.

Ownership

The ownership module provides details on the top investors and insider holdings in internationally quoted companies. For investment managers and mutual funds it also provides details of their investment portfolios.

Further Information: For further information on using this database or for assistance with your research, please contact a member of staff at the Eddie Davies Library or Precinct Library.

- Eddie Davies Library Enquiry Service Tel: 0161 275 6507 email: libdesk@mbs.ac.uk
- Precinct Library Enquiry Service Tel: 0161 306 3200 email: jrul.precinct@manchester.ac.uk

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