Datastream Advance provides Lingnan users access to the world’s largest and most respected historical financial numerical database. Users can access financial statements, accounting ratios, price information of listed companies in the world; exchange rates, interest rates and thousands of economic time series from many countries in the world.

Data can also be exported using the familiar Microsoft Excel interface by the Datastream-AFO add-in.

Both Datastream Advance and the MS Excel Datastream-AFO are available at the dedicated workstation at the Library.

Notes:

You are advised to reserve the Datastream Workstation at: http://www.library.ln.edu.hk/services/room-booking-system
Quick Start

Generally, we can obtain a report / table / chart by five simple steps in Datastream Advance 5.0

1. Select the type of series you want from the Data Category window (Equity; Equity Index; Interest Rates, etc.)

2. Use the Datastream Find Series button to find the Series

3. Select the type of request like reports, charts, overviews etc. from the Analysis Window

4. Refining Your Request - Change time period and / or Frequencies

5. Run your request

6. Refining Your Request - Change Datatype
### Step 1 - Select a Data Category

Select the type of series you want from the Data Category window (Equity; Equity Index; Interest Rates, etc.)

<table>
<thead>
<tr>
<th>Data Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Equity</strong></td>
<td>Listed companies equities (one company can be listed in more than one market)</td>
</tr>
<tr>
<td><strong>Equity Index</strong></td>
<td>Local indexes (e.g. Hang Seng Index), MSCI indexes, Datastream Indexes etc.</td>
</tr>
<tr>
<td><strong>Constituents</strong></td>
<td>Constituents of indexes, industrial sectors, etc.</td>
</tr>
<tr>
<td><strong>Local Lists</strong></td>
<td>Access user-created equity list and search results</td>
</tr>
<tr>
<td><strong>Economics</strong></td>
<td>Time series data of macroeconomic indicators from local sources or international organizations like UN, IMF, OECD, etc.</td>
</tr>
<tr>
<td><strong>Exchange Rates</strong></td>
<td>Time series archive of foreign exchange rates in various countries</td>
</tr>
<tr>
<td><strong>Interest Rates</strong></td>
<td>Time series archive of interest rates in various countries</td>
</tr>
</tbody>
</table>
Step 2 - Find & Select the Series with Datastream Navigator

Use the Find Series button to find and select the Series

Click the Advanced Search

Type the first few characters of the name, mnemonic, or code in the respective field, then click Search Now

Select the Series you want from the list
## Step 3 - Select Type of Request

<table>
<thead>
<tr>
<th>Type of Request</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Single Series - Overview</strong></td>
<td>You can request Datastream company, commodity, warrant, trust, and bond performance overviews, and a range of fixed format IBES forecast overviews.</td>
</tr>
<tr>
<td><strong>Multiple Series / Flexible Chart</strong></td>
<td>You can display information on multiple series, enabling you to create comparisons across different data category types, and use flexible charts for multiple chart requests. For example, you can compare an equity with an index such as the CAC40 and with an economic series such as the RPI.</td>
</tr>
<tr>
<td><strong>Single Series - Chart</strong></td>
<td>You can request any of the standard Datastream graphics, including Line, Moving Average, High-Low-Close, Candlesticks, and Bollinger Bands.</td>
</tr>
<tr>
<td><strong>Single Series - Report</strong></td>
<td>You can select from a range of pre-formatted report types including Profit &amp; Loss, Dividend &amp; Earnings, Key Accounts Ratio, and Company Profiles.</td>
</tr>
<tr>
<td><strong>Single Series - Data</strong></td>
<td>You can select from a range of pre-formatted report types including Profit &amp; Loss, Dividend &amp; Earnings, Key Accounts Ratio, and Company Profiles.</td>
</tr>
<tr>
<td><strong>Codes and Information</strong></td>
<td>You can use the Remote Search as an alternative way to find codes for active and dead equities, unit, investment trusts, bonds, warrants and convertibles. There is also an option to set Advance to run requests and update projects in English, French and German.</td>
</tr>
<tr>
<td><strong>Favorites</strong></td>
<td>You can save frequently used projects as <strong>Favorites</strong> so that next time you can run the request quickly.</td>
</tr>
<tr>
<td><strong>Scenario Testing</strong></td>
<td>Use the intuitive interactive charting interface to graphically explore trends and relationships between any of the series on Datastream.</td>
</tr>
<tr>
<td><strong>Equity Screening</strong></td>
<td>Search the Datastream global equity universe for companies that match your chosen criteria.</td>
</tr>
</tbody>
</table>
Step 4 - Refining Your Request - Change Time Period and/or Data Frequencies

Each data category has a default date range. You can choose your own from four display period options:

- Fixed start and end dates - a fixed period. For example, the whole of last year.
- Relative start and end dates - a fixed period relative to today’s date.
- Datastream base date - a period starting with the date of the earliest data available on the database for a series.

**NOTE**
If you collapse the time period, Datastream will only provide *end of period* data. For example, Datastream provides closing price of equity on daily basis. If you however choose to set the download frequency to monthly, Datastream will display the closing price for the last trading day of each month instead of the average price for the whole month.

Step 5 - Run and View Result

-3M means previous 3 months; -10Y means previous 10 years

To customize date range, click **Time Period**

To choose the Start Date and End Date from the Configure Dates dialog box

Use **Settings** to change the Data Frequencies. For most Time Series, you can choose the output frequency to be daily, weekly, monthly, quarterly or annual data.
Step 6 - Refining Your Request - Change Datatype

The datatype defines the type of data. For example, the default datatype for equities is Price (Adjusted).

When applicable, the Datatype navigation button would be enabled, click to display the datatype available for your data category. For example, for an Equity line chart request you can change from the default Price (Adjusted) datatype to Market Value (Capital).
Example 1

Getting Company Information (Company Performance, Key Accounts Ratio Report & Charts)

Get Company Information:

Step 1 - Select a Data Category
Step 2 - Find & Select the Series

Enter the keyword of the company like CHEUNG KONG at the series field and then click Search Now.

More than one equity may appear. Choose the appropriate one based on the name of the stock, stock market etc.

Step 3 - Select Type of Request

Choose the Overview of Company Performance.
Step 4 - Change Settings

Use default setting

Step 5 - Run and View Result
Get Key Accounts Ratio Report & Charts:

**Step 1 - Select a Data Category**

**Step 2 - Find & Select the Series**

**Step 3 - Select Type of Request**

Click *Criteria Search*, select *Advanced Search*, then enter keyword of the company like Cheung Kong Holdings at series field and select appropriate one using the Datastream Navigator.
Step 4 - Change Settings

Use default setting

Step 5 - Run and View Result
If you are going to get the Price and Price Relative Chart of the same company, simply re-select the Type of Request from the Analysis Window and run the result.

Choose Price and Price Relative Chart (or other charts to view the Cheung Kong Holdings equity performance)
Example 2

Download Financial Data for all HK Clothing Companies with Market Value Over 1 Billion HK Dollars

Step 1 - Click Equity Screening Tab and click New Search

Step 2 - Select Hong Kong under Country Code and add to search criteria list by clicking the “+” button. Then click Next.
Step 3 - Set the Market Value over 1 Billion Criteria: choose Market Value, change Limitations and Units to Over and Billions respectively. Then click the “+” button to add this to the criteria list.

Step 4 - Select Industry & Sector Mnemonics tab and choose the desired industry. Then click the “+” button to add this to the criteria list.
Step 5 - Select Sort Order & Currency tab, then select “Descending” for sorting the Market Value in Descending Order. Then click Search Now.
Step 6 - The list of companies which meet the search criteria is displayed by market value in descending order. Save the list for further action.
Step 7 - Click the Request tab to go back
Step 8 - The saved list is now available in the Local Lists. Switch the Data Category to Local Lists and you will find the list under the name previously saved in Step 6.

Select Company Accounts Data from List of Series – Summary to obtain Summary Report.
Step 9 - Request & View Result

Summary Report of the local list
Example 3
Download the Unemployment Rate of HK

Step 1 - Select a Data Category

Choose Criteria Search from Economics
Step 2 - Find & Select the Series

1. Enter **Hong Kong** as Market

2. Click Search Now

3. More than one unemployment series may appear. Choose the most appropriate one.
Step 3 - Select Type of Request

Step 4 - Run and View Result
Example 4

Download Statistics using Excel Datastream-AFO: Looking for Imports & Exports of Goods / Imports & Exports of Services for Singapore

Step 1 - Open a Microsoft Excel file at the Datastream Workstation and Choose Add-Ins, then select Time Series option of the Datastream-AFO

Step 2 - At the Time Series Request dialog box, click the Find Series button to select the desired Series
Limit the search to the *Balance of Payments* Classification; enter *goods* or *services* as Name; enter *Singapore* as Market

Enter *goods* as Name. Then click “+” to get more input field and enter *services* as Name.

Click “or” because we are looking for time series which contain either the word *goods* or *services* under the *Balance of Payments* Classification.

Time Series that match the criteria are displayed.

Click one at a time. Or you can use the checkbox to select multiple items, then click *Use Selected*.
Step 3 - Select the Series

DS Mnemonics of the Selected Series will show up here

If the Embed option is selected, a Refresh button (as shown below) will be placed in the spreadsheet, which means your data requests can be saved and refreshed within Excel.

Step 4 - Set the dates and data frequency

Step 5 - Submit and Retrieve Data

Refresh button – enables you to refresh the embedded request automatically upon opening the spreadsheet.
Step 6 - If you want to edit your search criteria, go back to the Request Manager
Highlight the Request entry

Click **Edit** to display the Request Details dialog for editing

Make your changes and click **Submit**. The original request is overwritten with the new one.