



## THOMSON REUTERS DATA THROUGH WHARTON RESEARCH DATA SERVICES (WRDS)

### 13F INSTITUTIONAL HOLDINGS

database provides Institutional Common Stock Holdings and Transactions, as reported on Form 13F filed with the SEC. This database is formerly known as CDA/Spectrum 3 4 database, and contains ownership information by institutional managers with \$100 million or more in Assets Under Management (Section 13(f) Securities).

▲ Coverage from 1980

**I / B / E / S** was created over 30 years ago to provide both summary and individual analyst forecasts of company earnings, cash flows, etc.

▲ Coverage from 1970

**I / B / E / S GUIDANCE** allows academic clients to directly compare analyst and management expectations on company performance, safe in the knowledge that they are using the same accounting basis for consistent analysis. Guidance provides the user with comments directly from management about future expectations. A Global Database with over 8,200 companies in 50 countries and history back to 1994, academics utilize the IBES and IBES Guidance together to form hypothesis in different directions – resulting in conclusions that illustrate the strength of the product set.

### INSIDER FILINGS (IFDF)

Designed to capture all U.S. insider activity as reported on Forms 3, 4, 5, and 144 in line-by-line detail. A unique cleansing process is used by Thomson Reuters that adds value by making systematic interpretations on the accuracy of as-reported data and inserts “cleansed” fields for comparison.

### MUTUAL FUNDS

database provides security holding information for all registered mutual funds that report their holdings with the SEC, plus 3,000 global funds. Reported securities include all NYSE/AMEX/NASDAQ, Toronto, and Montreal common stocks. This database is formerly known as CDA/Spectrum/S12.

▲ Coverage from 1979

### THOMSON REUTERS LIPPER HEDGE FUND (FORMERLY TASS)

is an indispensable resource for institutional asset managers, high net worth investors and consultants who monitor the global hedge fund industry. Coverage from 1990 include - Quantitative performance data on over 7,500 actively reporting Hedge funds/Funds of Hedge Funds and Performance data on over 11,000 graveyard funds that have liquidated or stopped reporting.

### REUTERS DEALSCAN

is the world’s pre-eminent source for extensive and reliable information on the global syndicated bank loan market. It provides users with access to Thomson Reuters LPC’s robust database of detailed terms and conditions on over 240,000 loan transactions.

### WORLDSCOPE FUNDAMENTALS

allows access to comprehensive, accurate and timely fundamentals data for a measurable advantage when analyzing companies—global coverage levels never before seen.

While advances in harmonization have been made by major exchanges, financial accounting practices remain diverse and company presentations remain highly inconsistent. Thomson Reuters Worldscope Fundamentals addresses this complexity by utilizing uniform definitions and standardized statement organization.

▲ Coverage from 1980

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## **ABOUT WRDS**

Wharton Research Data Services (WRDS) is the leading data research platform and business intelligence tool for over 30,000 corporate, academic, government and nonprofit clients at over 350 institutions in 33 countries. WRDS provides the user with one location to access over 200 terabytes of data across multiple disciplines including Accounting, Banking, Economics, Finance, Insurance, Marketing, and Statistics. Flexible data delivery options include a powerful web query method that reduces research time, the WRDS Cloud for executing research and strategy development, and the WRDS client server using PCSAS, Matlab, Python and R. Our Analytics team, doctoral-level support and rigorous data review and validation give clients the confidence to tailor research within complex databases and create a wide range of reliable data models. WRDS is the global gold standard in data management and research, all backed by the credibility and leadership of the Wharton School.

## **ABOUT THE WHARTON SCHOOL**

Founded in 1881 as the first collegiate business school, the Wharton School of the University of Pennsylvania is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. With a broad global community and one of the most published business school faculties, Wharton creates economic and social value around the world. The School has 5,000 undergraduate, MBA, executive MBA, and doctoral students; more than 9,000 participants in executive education programs annually and a powerful alumni network of 92,000 graduates.

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