



# UNIVERSITY of NORTH CAROLINA WILMINGTON

## HOW TO HOW TO RUN A DATA QUERY WITH COMPUSTAT

### 1. Navigate to Compustat

Go to Capital IQ under Subscriptions on the home page. Select North America and then Fundamentals Annual.

### 2. Enter the Date Range

Choose either Fiscal Year or Data Date from the drop down. Enter the date range in the format (yyyy-mm) using the textbox, hovering over the text box allows you to see the minimum and maximum dates. Alternatively you can click the textbox and use the calendar option to enter the dates.

**i** For this example choose Data Date and enter 2011-01 to 2015-01

### 3. Enter the Companies

Select which format your companies will appear in (TIC, GVKEY, CUSIP, SIC, NAICS, or CIK). Enter the companies into the text box, upload a txt file, or use a previously saved codelist. You can use the code lookup to find companies or enter and save a codelist by selecting the option on the right. You could also select the entire database to search from, but this may be time consuming and is not recommended.

**i** For this example select the TIC option and enter IBM AMZN WMT in the textbox



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### 4. Select the Variables

Choose the variables you want from the Query List. You can search variables using the textbox. To learn more about a variable select the question mark. A dialog box will appear giving you more information about what kind of data you can pull using that variable.

**i** For this example select Company Name, City, AT-Assets, LT-Liabilities, and SEQ-Stockholders Equity

### 5. Add Conditional Statement (Optional)

Use the drop down list to create a statement or select the option to remove the statement builder.

**i** For this example select the option to remove conditional statement builder

### 6. Select Query Output

Select the desired format of the output file. For large data requests, select a compression type to expedite downloads. If you enter your email address, you will receive an email that contains a URL to the output file when the data request is finished processing, but this is not required. You also have the option to save your query.

**i** For this example select the option Excel spreadsheet (\*.xlsx)

### 7. Submit Query

This will open a new tab, you should see the message "Your request is being processed... This page will refresh every 5 seconds until the output appears." Once your query is finished you should see the message "Your output is complete. Click on the link below to open the output file."

**i** Your results should look like the picture below.

Global Company Key	Data Date	Fiscal Year	Statement	Form	Period	Data Format	Ticker Symb	Company Name	Currency	Assets - Total	Liabilities - Total	Equity - Parent	Dividend	City	
2	6066	20111231	2011	INDL	C	D	STD	IBM	INTL BUSINESS MACHINES CORP	USD	116433	96197	20138	A	Armonk
3	6066	20121231	2012	INDL	C	D	STD	IBM	INTL BUSINESS MACHINES CORP	USD	119213	100229	18860	A	Armonk
4	6066	20131231	2013	INDL	C	D	STD	IBM	INTL BUSINESS MACHINES CORP	USD	126223	103294	22792	A	Armonk
5	6066	20141231	2014	INDL	C	D	STD	IBM	INTL BUSINESS MACHINES CORP	USD	117532	105518	11868	A	Armonk
6	11259	20110131	2010	INDL	C	D	STD	WMT	WAL-MART STORES INC	USD	180663	109008	68542	A	Bentonville
7	11259	20120131	2011	INDL	C	D	STD	WMT	WAL-MART STORES INC	USD	193406	117241	71315	A	Bentonville
8	11259	20130131	2012	INDL	C	D	STD	WMT	WAL-MART STORES INC	USD	203105	120848	76343	A	Bentonville
9	11259	20140131	2013	INDL	C	D	STD	WMT	WAL-MART STORES INC	USD	204751	121921	76255	A	Bentonville
10	11259	20150131	2014	INDL	C	D	STD	WMT	WAL-MART STORES INC	USD	203706	117769	81394	A	Bentonville
11	64768	20111231	2011	INDL	C	D	STD	AMZN	AMAZON.COM INC	USD	25278	17521	7757	A	Seattle
12	64768	20121231	2012	INDL	C	D	STD	AMZN	AMAZON.COM INC	USD	32555	24363	8192	A	Seattle
13	64768	20131231	2013	INDL	C	D	STD	AMZN	AMAZON.COM INC	USD	40159	30413	9746	A	Seattle
14	64768	20141231	2014	INDL	C	D	STD	AMZN	AMAZON.COM INC	USD	54505	43764	10741	A	Seattle