We are now Refinitiv, formerly the Financial and Risk business of Thomson Reuters. We’ve set a bold course for the future – both ours and yours – and are introducing our new brand to the world.

As our brand migration will be gradual, you will see traces of our past through documentation, videos, and digital platforms.

Thank you for joining us on our brand journey.
UPGRADING FROM DATASTREAM PROFESSIONAL TO THOMSON REUTERS EIKON
TOP TIPS GUIDE
Why Upgrade to Thomson Reuters Eikon?

1. Eikon provides **faster search and enhanced data visualization** with better integration of content, for increased efficiency and usability.

2. **Country Views** – aggregate all the most relevant market data, news, economic data, research, events and more for a country or region, so you can explore new markets for ideas.

3. **Comprehensive cross-asset views** – Eikon offers easy access to FX, Money Markets, Fixed Income, Equities, Commodities and Funds data via the Search box and also from menu pages which are simple to navigate.

4. **Macro Economic insight** – the Economic Monitor app – lets you easily monitor up to 20 countries and create as many lists of indicators as you need. The Macro Explorer app uses data visualization to give you historical insight across hundreds of indicators to help identify investment opportunities across markets globally.

5. **Estimates** – Access expanded Estimates data and functionality including 192 Industry specific key performance indicators (KPIs) from Thomson Reuters I/B/E/S. Eikon also combines detailed broker estimates with StarMine SmartEstimates so you can more easily gain insight into potential earnings surprises.

6. **Screening** – use more powerful Screening capabilities with numerous additional features such as more fields and filter options, multi-factor ranking, custom expressions and more, for faster idea generation across a global universe, against 6,000 data items.

7. **Charting tools** to enable faster analysis – as well as all the Datastream charting you are familiar with Eikon offers additional capabilities. E.g. a new Chart List mode for indices and portfolios to quickly scroll through constituent data, and perform quick re-basing and relative performance studies.

8. **Portfolio Analytics tools** – Eikon has a suite of Portfolio Analytics tools for analyzing real-time and historical contribution / attribution, profiling and forecast risk, (ask your account manager for a separate brochure).

9. **Build models faster in Excel®** – Eikon provides integration with Microsoft Office® for real-time, historical, fundamental and time-series data in Excel, Word™ and PowerPoint®. Intuitive search and function-building tools makes model building easier so you can increase productivity. The Datastream for Office (DFO) Add-In is also available.

10. **Mobile apps** including web and offline access – mobile capabilities include Web access to Eikon, and apps for iPad™, iPhone®, Android™ and Blackberry® devices. There’s also a “briefcase” feature so you can view research, events, news and more via mobile, even if you are offline.

11. **Collaboration tools** – Share ideas and content internally with colleagues via the built in Messenger tool, including workspaces, charts, and more.
A Smooth Transition from Datastream Professional to Eikon

All charts, styles, templates, expressions, lists, user-created indices and time-series that you have created using the Datastream Professional desktop are retained in Eikon.

Eikon provides all the key features of Datastream Professional as highlighted below. This guide shows you the equivalent screens in Eikon which in many cases have additional features and content that will increase your efficiency and insight into the markets. This list is a subset of the content and functionality offered in Eikon. For more details please contact your Thomson Reuters Account Manager.

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Screener

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SUPPORT – PAGE 32

Support
Search

Use Eikon’s search box to find **apps, data** and **answers to your questions**

- Eikon provides highly intuitive search through “autosuggest” and natural language search e.g. Type Ford vs GM Sales
- Search across asset classes
- Includes greater private company coverage

**Sample searches**

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<td>Company names or common abbreviations</td>
<td></td>
</tr>
<tr>
<td>Descriptive terms</td>
<td>Comex copper, vodafone common stock</td>
</tr>
<tr>
<td>Standard industry codes</td>
<td>Ticker, ISIN, Cusip, Sedol, WERT</td>
</tr>
<tr>
<td>Specific and partial codes</td>
<td>US4592200HJ3, MSFT, USTB</td>
</tr>
<tr>
<td>Ticker, coupon, and maturity</td>
<td>VOD &gt;7.5%, Vodafone 2015</td>
</tr>
<tr>
<td>Country names for country guides</td>
<td>France, UK, Japan</td>
</tr>
<tr>
<td>News searches on specific instruments or topics</td>
<td>IBM news, China news, USPT news</td>
</tr>
</tbody>
</table>

1. Start typing Vodafone in the Search box.
2. Autosuggest displays results.
3. Click a result to load content. For example, you can open the Chart App with data for Vodafone already loaded.
4. If you don’t find what you are looking for, press Shift+Enter or click here to run an advanced search.
Workflow – Linking Views in a Workspace

First create a **New Workspace** then add **Apps** to it

**CREATE A NEW WORKSPACE**

Click here (top right tool bar) to create new workspaces or open sample templates

**ADD APPS TO YOUR WORKSPACE**

When you open an app by selecting it in the app menu, the App Library, or through the Search box, it automatically becomes part of your active workspace.

This example includes a Quote List, Option Watch, and News Monitor.

The active symbol (in this case, Renault <RENA.PA>) is the most recent financial instrument you have focused on. When you add an app, it automatically displays data for the active symbol.

**Suggested Apps**

- Top News (type “TOPNEWS”)
- Company Overview (type company name or code and “OV” e.g. “Apple OV”)
- Industry Overviews (type “INDUS”)
- Country Overviews (type country name)
- Search (type “SEARCH”)
- Screener (type “SCREENER”)

Click an app title bar to move the app.

Click and slowly drag an app until its frame touches another app: the two apps “snap” together, and you can move them around as a single entity.

Resize an app as you would any other window: just click the frame and drag to the new size.

Add News Monitor to your workspace to get:

- the latest market-moving news
- historical news archives
- feature-rich, intuitive user interface
Workflow – Linking Views in a Workspace

Then link the apps together

You can link apps together so that they share the content of your chosen instruments. Color-coded apps “tune in” to the same data.

1. This example includes a quote list, news and a company overview page.
2. In the top left of each app, click to choose a color. In this case, all three apps are linked with red.
3. Now that the apps are linked, type a new instrument code into any app. All other apps will automatically display content for the new instrument.

Tip:
When you snap apps together, if one is already tuned to a color, the other one links to the same color.

SHARE WITH COLLEAGUES
After creating your workspace, you can save it for later use or share it with colleagues. Just right-click the workspace tab in the application toolbar, and choose Save.
Routine Tasks – Monitoring a Portfolio or List

- The Routines app lets you monitor instruments within a Portfolio or List, and automate repetitive tasks.
- Cycle through your list of securities using the “slideshow” bar.
- To save time choose from a library of preset routines under “Sample Routines” including “Security Analysis”, and “StarMine Analytics” routines.
- Or build your own routine customized to your needs by selecting “new template”.

Type Routine or RTNE
Company Overviews

- Access single security data in one specific landing page tailored to your job profile
- View a Business Description, quick EPS vs. Industry Charts, price chart relative to an index, latest Filings, upcoming events and more
- Access Thomson Reuters vast company content sets and broader asset class data
- Also benefit from StarMine alpha models for bullish and bearish indicators

**Tip:**
Access significant news that impacted a company with Reuters Investor Briefs (under the News drop down menu).

Type the company code or name followed by **OV e.g. GOOGLE OV**
Estimates – Consensus

Type the company code or name followed by EST e.g. GOOGLE EST

- With more than 40 years of experience, Thomson Reuters I/B/E/S Estimates is the industry standard for analyst detail, consensus and aggregate data, offering more history, contributing brokers and company coverage than any other provider
- The Income Statement View shows Mean estimates across multiple measures and fiscal years
- Click between annual and interim views
- View the data alongside dynamic charts and quickly export the content into Excel with a single click for additional due diligence
Estimates – Detailed

To access type the company code or name followed by **ESTD** then select **Estimates** from the drop down for additional views

- Breakout each measure by broker to see the underlying detail, for single period or full year
- Eikon offers more measures, a vastly superior chart view, plus StarMine “SmartEstimates” (see below) and red and green indicators showing deviation from the mean

**INDUSTRY-SPECIFIC METRICS**
- Perform in-depth peer group analyses with industry-specific performance indicators
- Access 192 key metrics across Airlines, Banking and Finance, Energy and Mining, Insurance, Pharmaceuticals and Healthcare, Real Estate, Hotels and Homebuilders, Retail and Restaurants, Technology and Telecommunications

The Predicted Surprise % is the percentage difference between the SmartEstimate and the I/B/E/S consensus estimate. When SmartEstimates diverge significantly from consensus, it serves as a leading indicator of the direction of future revisions and/or surprises. In aggregate, this indicator gets earnings surprises directionally correct 70% of the time.
Guidance (Incorporated into Estimates)

- Company guidance summaries provide you with qualitative and quantitative company expectations to help you gain insight into company's management expectations on such items as revenues, costs and operating expenses
- Guidance summary reports allow you to review and download both qualitative and quantitative company expectations from not only press releases, but also transcripts from conference calls

Type **Company name** or **code** & **GUID (select Guidance Summary)**
Recommendations

To access type the company code or name and **REC e.g. GM REC**

- Access company recommendation history and detail powered by Thomson Reuters I/B/E/S Estimates and StarMine Analyst Analytics
- Includes analyst ratings and Price Targets by analyst
Company Fundamentals

Type the company code or name followed by **INC** (income statement), **BAL** (balance sheet) or **CF** (cash flow).

- Standardized and “As – Reported” reports are available as well as annualized and interim periods.
- Click through to Filings for additional transparency.
- You can also Screen for companies using Fundamental data – see the Screener app on page 29.

**INCOME STATEMENT**  Quarterly Standardized in Millions of U.S. Dollars

![INCOME STATEMENT Diagram]

- StarMine Earnings Quality score for each period.
- Hover your mouse on an individual item to select and view a chart of the specific item historically.
- To see Definitions, Calculation methods and Excel functions for building your models, hover over the data type and click on ?
- Transparency with links to source documents a click away.
Filings

Type the company code or name followed by **FIL** or **ADVFIL** for an advanced search

- Access to filings for all companies, foreign and domestic listed on the SEC
- 20+ years history
- SEC Delta reports for quick insight into changes
  - To access select the two way arrows
  - Highlight what has changed between 2 sequential SEC filings for a company
  - Available for 10Ks and 10Qs for 3,500 companies & 5-Year history
Company Research

Type the company code or name followed by RES e.g. GOOGLE RES

- Provides an aggregated view across brokers for all types of research reports spanning 87 countries
- Sources include the world’s top investment banks, award-winning regional firms, local boutiques and independent research firms
- Our StarMine team ranks analysts based on earnings accuracy and timeliness so you can focus on analysts who have been historically more accurate
- Eikon provides more flexibility to add the page to your workspace, to a routine workflow or a pop out page
- You can also publish and access your own internal research

ADVANCED SEARCH
To access type RESEARCH and select “Research Advanced Search”
- Build and save your advanced searches using a range of criteria including public or private company, industry, analyst, report type and country or region
- Use keyword search across documents or headlines to quickly pinpoint specific reports
- Search for reports specifically related to companies in your portfolios
Corporate Events Calendar

Type: Advanced Events Search or ADVEV

- Advanced events search saves you time from performing cross-events search in disparate calendars/reports
- It provides you with a consolidated event view combining multiple event content sources into a single searchable app
- New functionality in Eikon:
  - Enhanced number of event types
  - Customizable columns allow you to edit fields in the search results, and sort and order to your preferences
Event Transcripts View

To access type the company code or name followed by EV then click the transcript icon from the content column

- Provides a full Transcript of the Presentation or Call for offline consumption in various file formats
- Use the “Briefcase” to make a version available in the Eikon mobile app for offline viewing
Aggregates

To access type in **AGGR** or “**Aggregates**” and select the Aggregates

- The Aggregates App lets you view aggregated content grouped by business classification, geography, index and portfolio
- Generate reports using StarMine Aggregation Methodology
- You can group the data simultaneously along two dimensions in a Matrix report layout
- The report templates are customizable
- Make important comparisons using key factors to evaluate equity securities
- Drill into an aggregate to quickly locate outliers and determine which companies are driving the value
- Eikon offers access to all of the aggregate content in one flexible report
StarMine Model Views

To access type the **company code or name** followed by the model code (see below)

- You can access the following StarMine Quant models in Eikon with detailed explanations and supplemental analytics. Some models have additional features in Eikon including peer analysis, scatterplot charts and more:
  - Valuation – Intrinsic, Relative, Value-Momentum (IV, RV, VALMO)
  - Price Momentum (PMO)
  - Earnings Quality (EQ)
  - Analyst Revisions Model (ARM)
  - Insider/Stakeholder (INSIDER)
  - Smart Holdings (SH)
  - Short Interest (SI)
  - Credit Risk – 4 models – Combined (CRM), Smart Ratios (CRSM), Structural (CRS) and Text Mining (CRT)

**Tip:**
Click on the ? button to find out more about the model and click on the Play button to see a video demo.
Working in Microsoft Office

To access launch Excel and login using the Thomson Reuters tab

- Eikon includes a single install of DFO (Datastream for Office), Datastream Charting tools and a new Eikon Add-In for Microsoft Office which combined provides all the functionality and content you had with Datastream Professional
- With the new Add-In you benefit from being able to quickly integrate your portfolios and lists into your Excel models
- You can simply drag and drop or export content from Eikon to Excel where it will update dynamically
- In Excel you can
  - access pre-canned templates at the country, company, and portfolio level
  - build security level and portfolio level models
  - integrate both Thomson Reuters content and your proprietary data to create dynamic models
  - Launch the Eikon Screener directly in Excel. For multifactor rankings start with the Screener in Eikon and export your results to Excel
  - Access the same Datastream content and functionality (including Charting) from the Thomson Reuters Datastream tab on your Microsoft Office toolbar
Watchlist Pulse

To access type **PULSE**

- Select your portfolio or list
- Monitor and review significant activities impacting companies in your portfolios and coverage lists with quick access to news, events, research and more
- See positive or negative movements for critical data sets such as price changes, technical indicators, news, StarMine Analytic scores and other factors all in one dashboard to help you quickly focus on what's most important
- You are also alerted to new analyst research including recommendation changes, revisions to estimates and management changes
- The Constituents tab allows you to create custom reports with your selected data items for the constituents of your chosen portfolio or list. Press F1 to get help on this feature
MARKET MONITORING

Economics

To access type in **ECON MONITOR** or **EM**

- Track all global macroeconomic indicator updates in a simple calendar interface
- Easily set up calendar updates in MS Outlook and create alerts for all economic events
- Quickly compare and contrast results with consensus estimates to identify market-moving positive/negative surprises
- Reuters economic polls allow you to track market expectations covering foreign exchange rates, macroeconomic indicators, interest rates, asset allocation and commodities & energy instruments, providing a context for developing your own economic and market scenarios
- 1,300 real-time economic indicators covered across 49 countries plus Euro Area and European Union aggregates

Click on the Indicator name to view a historical chart
Actuals are shown next to Reuters Poll Results
Shockwave indicators appear when the actual is outside the range of expectations
Thomson Reuters StarMine SmartEstimates can help you better predict the direction of macro surprises relative to the consensus forecast
Surprise readings can be used to anticipate market-moving announcements
News and Significant Developments

Type the company code or name followed by News or type TOPNEWS for overviews by category

- Reuters News from more than 2,600 full-time journalists globally giving you insight and depth that drive better financial decisions
- In Eikon you can view streaming News and filter by public and private companies, industries and countries
- Select Reuters Investor Briefs to see significant developments. We tag each development to a level of significance so you can view the most relevant news
- Global Press – search an archive of reputed global publications
Charting – Quickly Cycle through an Index

To access type **Chart** or **CHT**

- Enter an Index code or name e.g. .DJI or .FTSE
- Use the up and down arrows to cycle through the stocks in an index
- Or hold [Ctrl] and [Page Up] or [Page Down] to rotate through the index list
Charting Tools

To access: In the search box enter the company name or code and launch the **Company Overview** page. Click on the chart symbol to open in a new window or select the chart tab. Or type the code followed by **CHTV** e.g. MSFT.O CHTV

- Chart a company versus industry, sector, primary benchmark or peers
- History goes back 40+ years for some stocks
- Easily compare performance relative to peers, indices, sectors and industries
- Overlay internal and external research and significant announcements to determine price impact
- You can also overlay Fundamentals, Estimates, Estimate Revisions and corporate actions
- Event markers enable you to view the impact of event announcements such as dividends, earnings and capital changes
- Reuters Investor Briefs display concise news or announcements that may be of specific significance to the company

To access:
- In the search box enter the company name or code and launch the **Company Overview** page. Click on the chart symbol to open in a new window or select the chart tab.
- Or type the code followed by **CHTV** e.g. MSFT.O CHTV

**To overlay additional price series, Fundamentals, Estimates, Economics and more**

**Click on the ‘+’ to select “event markers” on your chart including Research, Analyst Ratings Changes, Dividends and Reuters Investor Briefs which indicate concise news or announcements**

**Hover your mouse over the ‘B’ symbols (for Reuters Briefs) to display related event information**
Charting – Chart Studies

To access type in **CHART STUDIES** and link apps (see page 6) for linking

- Fast access to Chart Studies including Performance (e.g. Total Return), Price, Valuation ratios and Technical charts
- Link news, prices and charts together so you can quickly cycle through a list of securities (see page 6 for linking apps)
- Datastream Charting
  - Type **DSCHART** to access
  - Analyze over 360 million time series across multiple asset classes including deep economic data
  - Access a ready-to-use economic chart library built by respected Economists
Cross Asset Guides

Click 📈 > Markets > select the guide of interest or use free text search or the codes in orange below

- Eikon offers easier access to cross asset content with guides for
  - Equities
  - Fixed Income (FING)
  - FX (FXG)
  - Money Markets (MMG)
  - Commodities
  - Funds Overview and more
- From the broad market overview you can navigate down to key details on a specific instrument
- Get easy access to calculators and models via the “Market Data and Tools” tab
Enhanced Alerting

To access select the bell icon in the top right hand corner of the toolbar

- Eikon provides alerting on market data movements, research (internal or external), news, filings, economics, corporate events, transcripts and briefs
- Receive alerts by email or pop up within Eikon and on your mobile
- You can receive email alerts in real-time or on a scheduled basis
Screening for Ideas

To access type **SCREENER** and follow the **“get started”** tips

- Screen across a global universe of 60,000 companies against 6,000 data items including industry specific performance indicators and custom expressions. You can also screen across 3.9 million Private Companies
- Select data items from Reuters Fundamentals, Thomson Reuters I/B/E/S Estimates, and unique content sources like Thomson Reuters StarMine Analytics
- Perform basic data analysis such as sorting, grouping, aggregation etc. using a data table and visualize the data using a scatter plot
- You can also Save Screens and set them as your Favorites
- Export your screening results to Excel and save as a list
- Multi-factor ranking capability with drill downs helps you understand which factors contribute most to overall rank

View and select data ranges in visual histograms to easily adjust
**Mobile**

To access download the Eikon app or access Eikon via a web browser

- Get real-time, breaking headlines from all over the world
- Real-time pricing from anywhere on the instruments you cover and markets of interest through personalized lists and comprehensive asset class overview screens
- Use the “Briefcase” feature to read news articles, research reports, transcripts and more, even when offline
- Access Eikon via a web browser at [eikon.thomsonreuters.com/login](http://eikon.thomsonreuters.com/login) for access to the key data and apps you need if you are out of the office
- Google Chrome extension – Use the powerful “Analyze this” capability to scan through a webpage and extract related content from Eikon for Companies, Industries, Countries and People profiles

Download the Universal Eikon App for iPhone and iPad from the Apple App Store. For BlackBerry, go to BlackBerry World. For Android, go to the Google Play App Store. The Google Chrome extension is available for install from the Google Chrome Web Store: simply type EIKON and click on the +FREE button to install.
Collaboration

Thomson Reuters Eikon Messenger provides you with secure, compliant access to the world’s largest directory of financial professionals.

- Instant message across networks, regardless of technology
- You can also send IMs directly to email
- Share real-time data quickly and easily with your contacts
- Message people on the move from your mobile device
- Gain even more insight on news and events by joining our exclusive invitation-only industry forums – each of which are led by expert Reuters journalists
- Share ideas and content internally with colleagues via the built in Messenger tool, including workspaces, charts, routines and more
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Click on the toolbar to open Messenger
Just click Customer Support in the Ungrouped category of contacts and type your message.

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