REFINITIV® EIKON WITH REFINITIV® DATASTREAM® FOR OFFICE ADD-IN

Top tips guide

REFINITIV®

DATA IS JUST
THE BEGINNING®

Why Refinitiv® Datastream® in Refinitiv® Eikon?

1. Eikon includes access to **Reuters News** from more than 2,600 full-time journalists globally, giving you insight and depth to drive better financial decisions.

2. **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.

3. **Integrated Refinitiv Datastream apps** provide convenient multi-tab or multi-window access to an existing library of charts, styles and templates – plus chart studies for quick and easy access to commonly used valuation, performance, technical and fundamentals charts.

4. **Macro Explorer** – this innovative app helps you explore and identify global economic trends, areas of risk and investment opportunities using macroeconomic and aggregated equity data across a range of visualizations, including a world map and sector heat map.

5. **Economic Events Monitor** provides a real-time global view on all macroeconomic announcements in a simple calendar interface. It includes Reuters economic polls so you can track market expectations concerning foreign exchange rates, macroeconomic indicators and more.

6. **Microsoft Office® add-in** – Eikon includes a suite of Datastream capabilities which are integrated as apps within the Eikon desktop and Microsoft Office. The new add-in offers additional content including real-time pricing, detailed estimates, ownership data and Refinitiv® StarMine® Quantitative Analytics – all retrieved using a simple wizard.

7. **Powerful screening capabilities** are available across a global universe of companies, against 6,000 data items with the ability to add your own custom expressions.

8. **Refinitiv® I/B/E/S® Estimates** include hundreds of industry-specific Key Performance Indicators (KPIs), while StarMine Quantitative Analytics provide added insight into the contributions and historical accuracy of individual analysts.

9. **Publish your research and recommendations internally to Eikon** so they are available across your firm alongside broker research, for better collaboration between your teams.

10. **Enhanced alerting keeps you more informed** – Eikon provides alerts on economics, research (internal or external), corporate events, transcripts, briefs, market data movements and news. Receive alerts by email or pop-up within Eikon or via mobile.

11. **Mobile apps** for iPad®, iPhone®, Android™ and BlackBerry® devices offer Web access to Eikon. There's also a Briefcase feature so you can view research, events, news and more via mobile, even if you are offline.

12. **Collaboration tools** – share ideas and content, including charts, workspaces and more, with colleagues via the built-in Refinitiv® Messenger tool.

13. **Global Markets Forum** – get exclusive coverage and unique views from the Reuters newsdesk and other market professionals.

A smooth transition from Datastream to Eikon

Ease of upgrade

All charts, styles, templates, expressions, lists, user-created indices and time series that you have created in the Datastream desktop are retained in Eikon – there is no need to migrate.

Eikon provides all the key features of Datastream Advance, 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 small subset of the content and functionality offered in Eikon. For more details please contact your Refinitiv Account Manager.

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News	✔

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Sharing internal research	✔
Enhanced alerting	✔
Portfolio analytics	✔
Mobile	✔
Collaboration and forums	✔

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Search

## Use Eikon's search box to find apps, data and answers to your questions

- Eikon provides highly intuitive search through auto-suggest and natural language search. For example, search **Ford vs GM sales** to display a comparison view of the sales for these two stocks
- Search across asset classes
- Includes greater private company coverage
- Datastream's powerful Navigator search tool is of course still available too, via the Datastream apps in the Eikon desktop and Eikon for Microsoft Office

Sample searches

Company names or common abbreviations	Microsoft, Vodafone, IBM
Descriptive terms	COMEX copper, Vodafone common stock
Standard industry codes	Ticker, ISIN, CUSIP, SEDOL, WERT
Specific and partial codes	US4592200HJ3, MSFT, USTB
Ticker, coupon and maturity	VOD >7.5%, Vodafone 2015
Country names for country guides	France, UK, Japan
News searches on specific instruments or topics	IBM news, China news, USPT news

1. Start typing **Vodafone** in the search box.

2. Auto-suggest displays results.
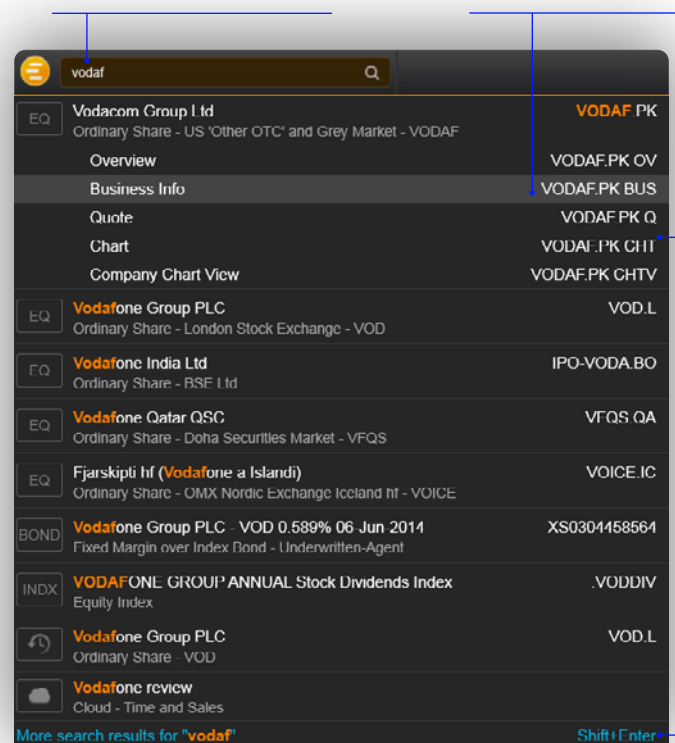
3. Click a result to load content. For example, you can open the Chart app with data for Vodafone already loaded.

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

To access, launch Microsoft Excel® and log in using the Refinitiv tab

Create a new workspace

Click here (top right toolbar) to create new workspaces or open sample templates.
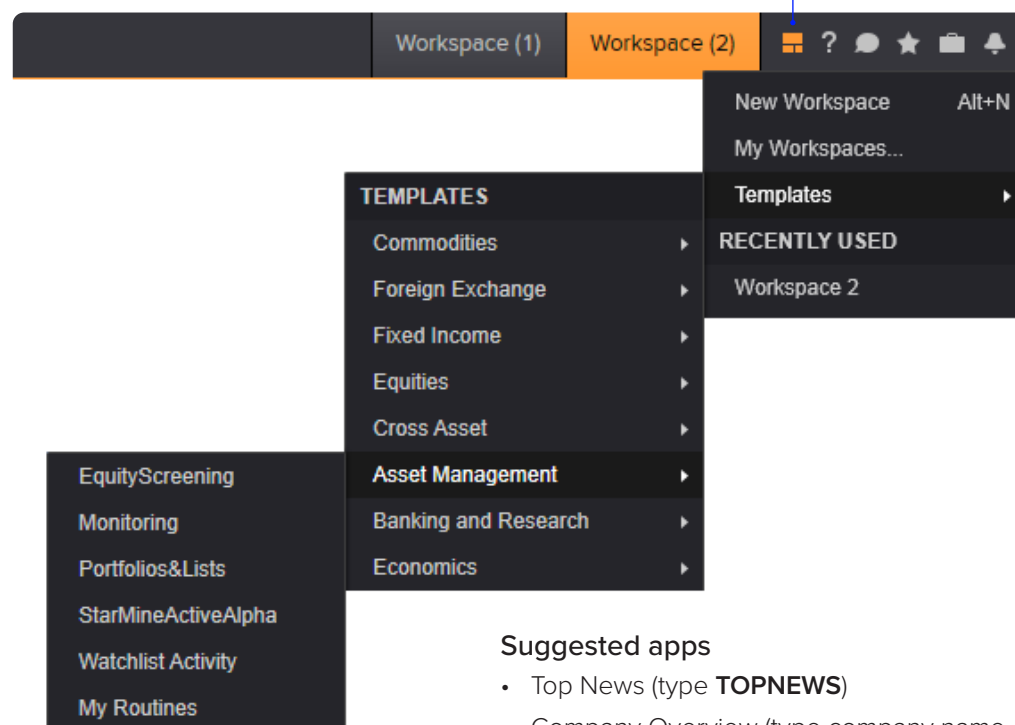
Suggested apps
- Top News (type **TOPNEWS**)
- Company Overview (type company name or code and **OV**, e.g., **Apple OV**)
- Industry Overviews (type **INDUS**)
- Country Overviews (type country name)
- Search (type **search**)
- Screener (type **screener**)

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.

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. Right-click on the workspace and select **Share** to send to a colleague using Messenger. More details on this collaboration tool can be found in the additional benefits section on page 24.

Working in Microsoft Office

To access, launch Excel and log in using the Refinitiv tab

- Eikon includes a suite of Datastream capabilities which are integrated as apps within the Eikon desktop and Microsoft Office

- The new add-in offers additional content including real-time pricing, detailed estimates, ownership data and StarMine Quantitative Analytics – all retrieved using a simple wizard

- You can also quickly integrate your portfolios and lists into your Excel models

- Simply drag and drop or export content from Eikon to Excel, where it will update dynamically

- Other advantages over the Analysis for Office add-in include:
  - Formula-based requests which can be integrated with Excel formulas, rather than ActiveX controls
  - An enhanced expression-building interface including extended character limits
  - Series suggest/type ahead functionality within the request window, for faster search
  - Support for RIC
  - Improved support for cell referencing and auto refresh
  - Integration with the Eikon desktop via right-click to relevant views, e.g., news
  - Keyboard shortcuts for routine tasks
  - Screening and portfolio management tools built in
  - HTTP communications which allow you to connect on the go using Wi-Fi
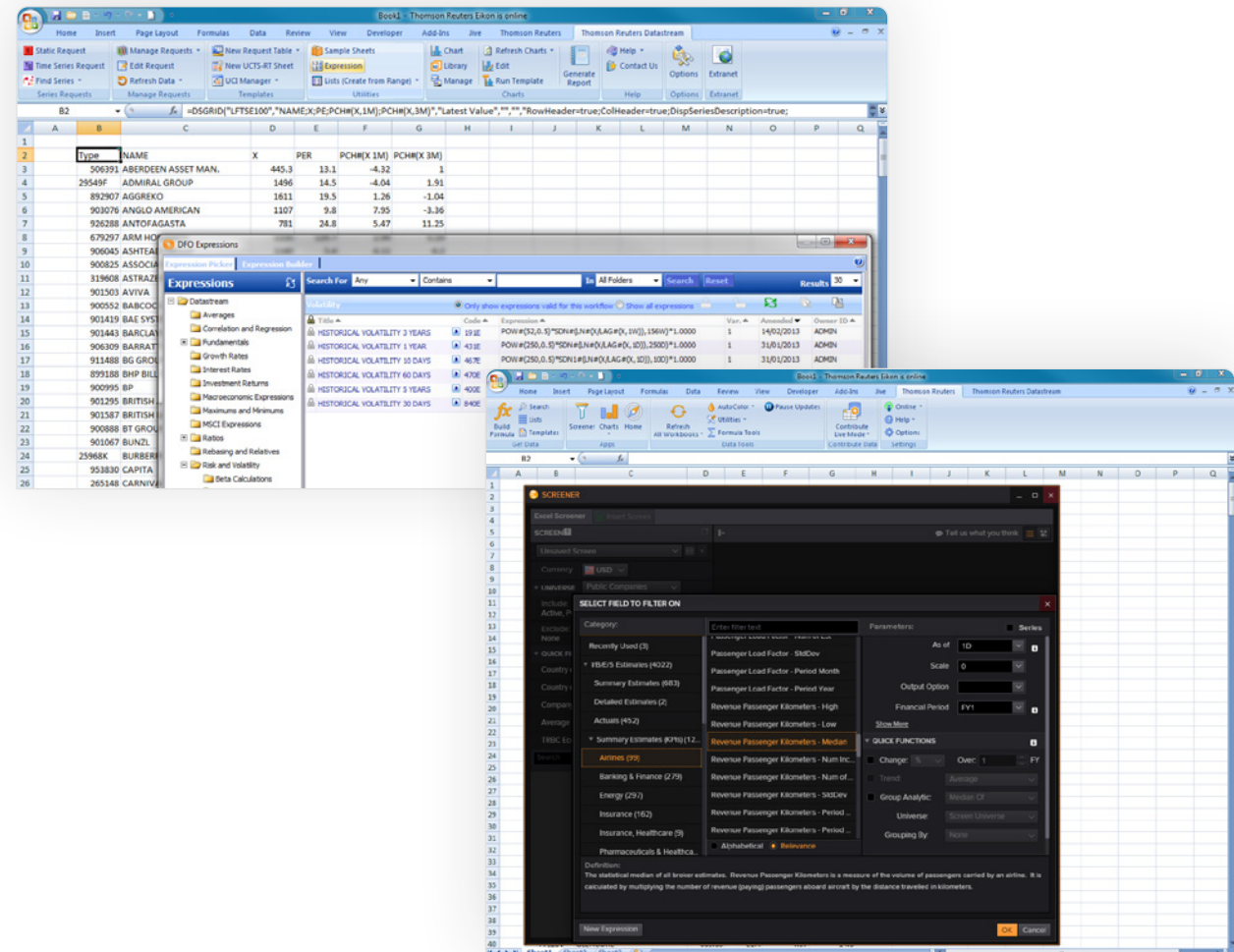
Chart organization/library (ex-projects)

Save charts in your Datastream Charting library – search **DATASTREAM LIBRARY** or type **DSLIB**

- Datastream charts can be saved in your library in a user-defined order and/or exported and saved in Microsoft Office applications
- Organize your Datastream charts into user-friendly, user-defined folders, subfolders and collections in the user library. These libraries are stored and hosted on Refinitiv servers, helping you avoid the risk of losing them
- You can also export charts in bulk to Microsoft Office files locally and save workspaces in Eikon containing Datastream charts and other content
- You can choose to share your charts with your colleagues by saving them into a shared folder, or keep them hidden in your private folder

Overviews

For Company Overview pages, search on company name or code and select **OVERVIEW**.
Datastream Navigator also provides summary metadata and quick charts in its Spotlight panel

- Eikon's Company Overview pages provide a wide range of company-related information in one highly customizable landing page that you can tailor to your needs

- Overview pages include a business description, news, significant developments, events, fundamentals, estimates and recommendations, plus StarMine-related bullish and bearish model information

- Datastream Navigator provides dynamic links to related securities, peers, indices and constituent lists, plus additional notes such as business descriptions for equities or source notes from third-party economic data providers
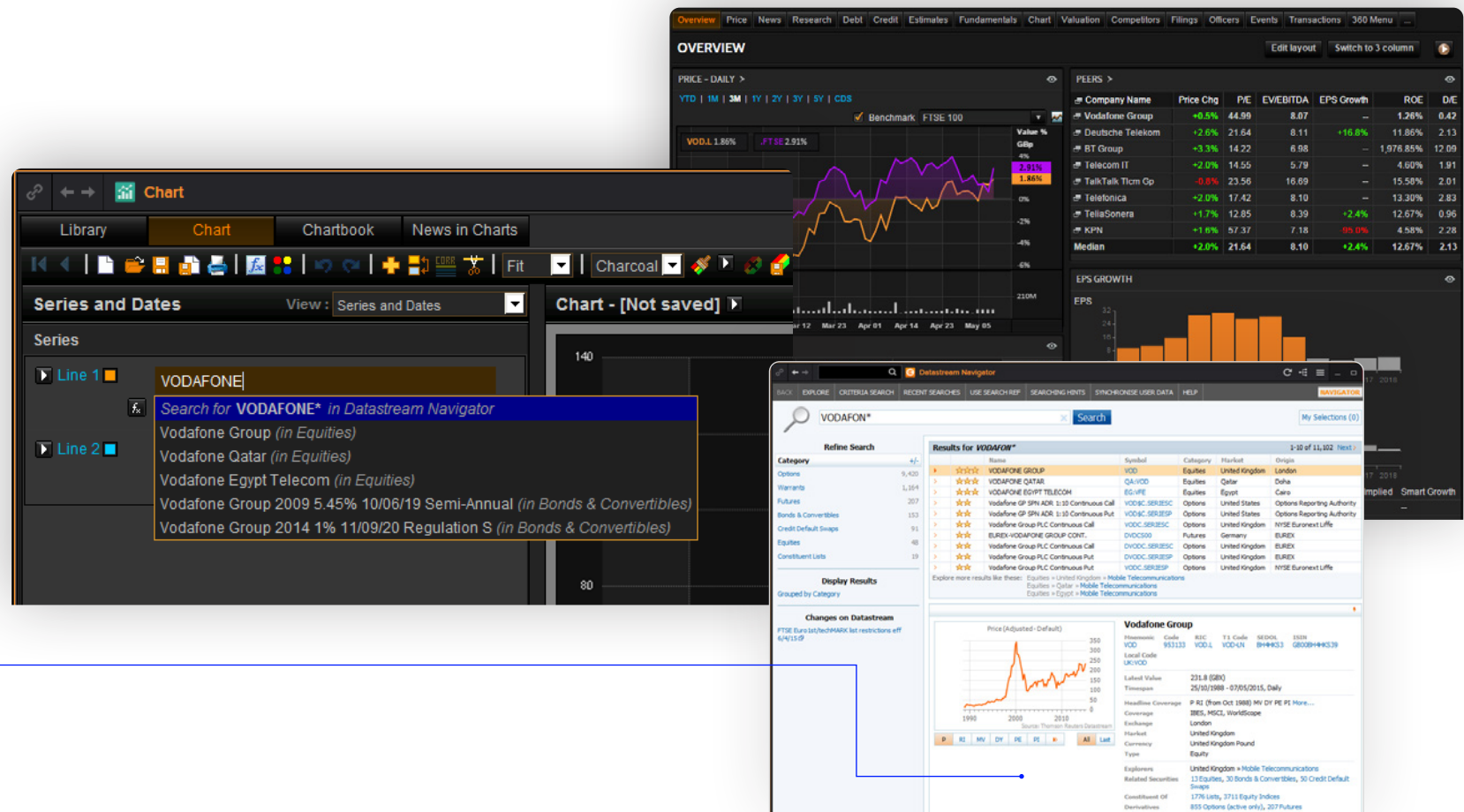
Datastream Chart Studio

- The Datastream Chart Studio in Eikon provides an improved and modernized look and feel for chart creation
- Includes full editing, customization and publishing capabilities, plus sophisticated analytical tools such as slicing of multiple time periods, optimal correlation of lines and multiple regression
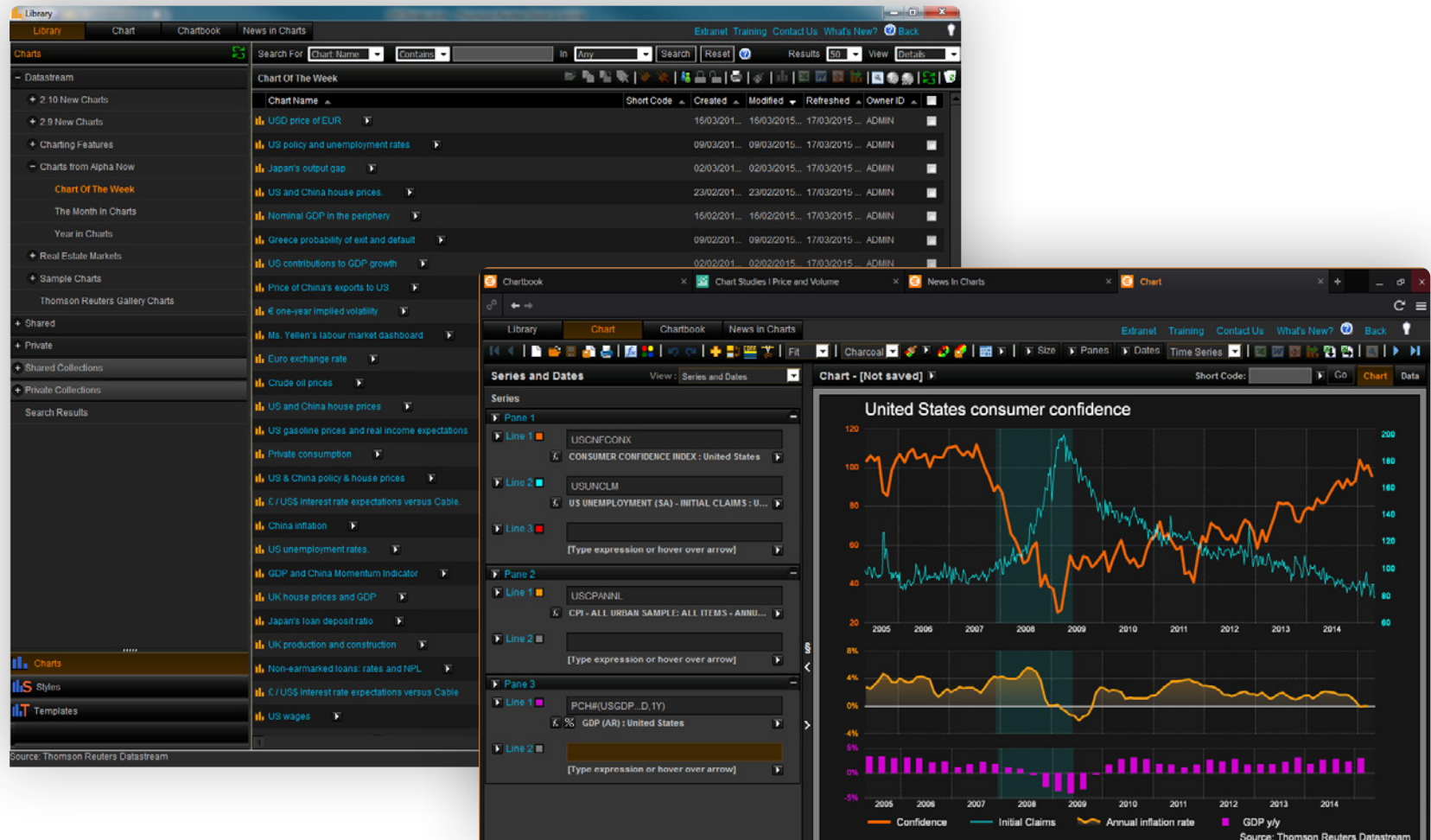- Access an extensive library of example charts and pre-built topical charts from renowned economists in the chartbook

Chart studies

To access, type the company name or code followed by **CHART STUDIES** or right-click an equity symbol and choose **Related > Datastream**

- Quick and easy access to a wide variety of pre-built charts, grouped into categories for fundamentals, performance, valuation and technical analysis

- Link news, prices and charts together so you can quickly cycle through a list of securities (see page 6 for linking apps)

- All chart studies can be displayed for the time period of your choice – and can be fully customized and published using the sophisticated tools available in Datastream Charting
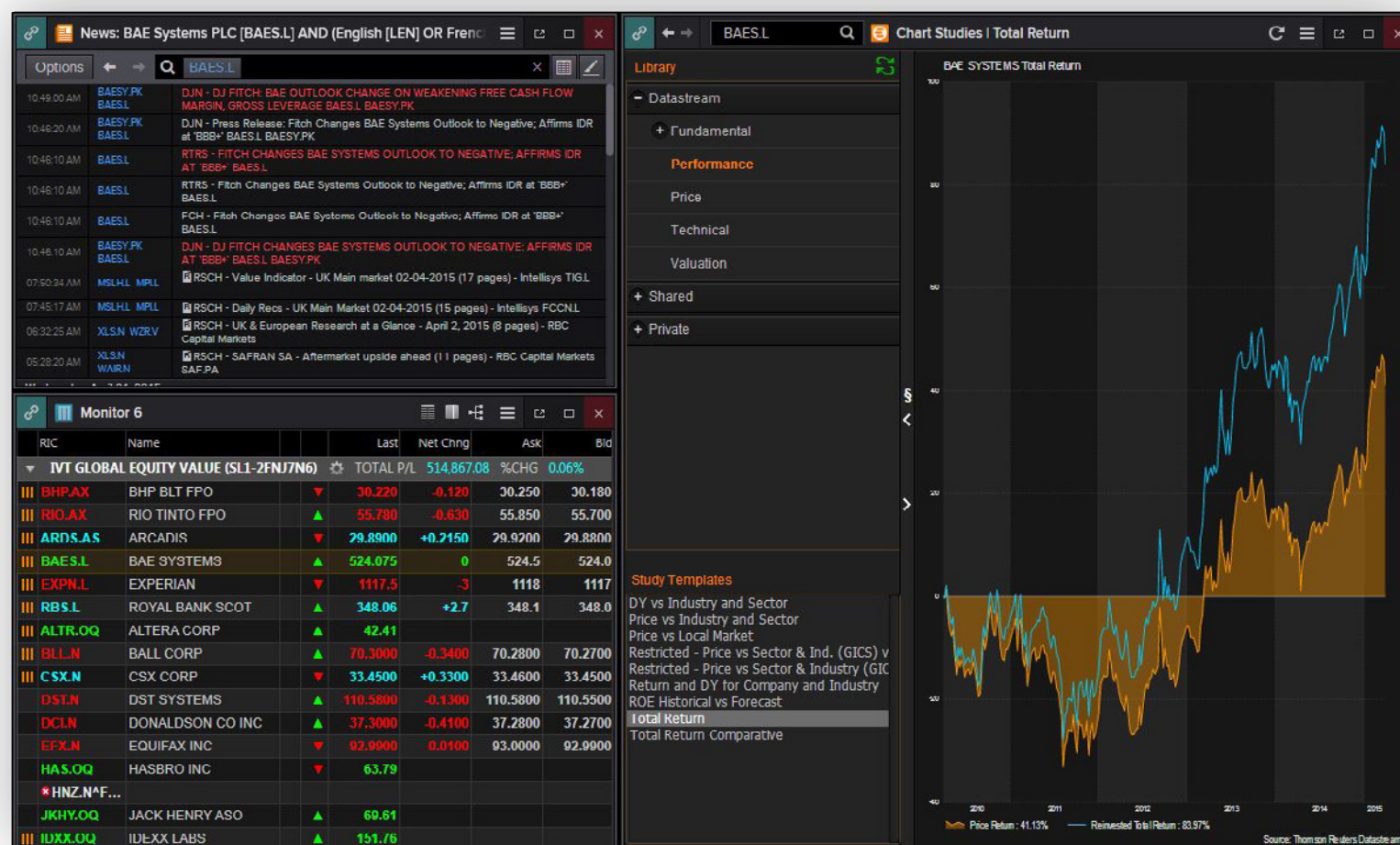
PE Bands

To access, type the company name or code and **PEBANDS**

- PE Bands help you to visualize a company's performance relative to its historical valuation
- Two versions are available: fixed multiples of earnings (1X, 10X, 20X, 30X, 40X) or dynamically placed bands according to the maximum and minimum PE over the period
- PE Bands are conveniently available alongside a range of other chart studies

Automating and scheduling index files downloads

Use Windows Task Scheduler with the Datastream index file templates

- Datastream charts and request table files can be linked to an index file (a Datastream Excel template) and set to run the update download when the file is opened
- The Task Scheduler utility, which is available as standard in the Accessories section of the Windows operating system, can then be used to schedule the index file to open at a given point in the future (e.g., overnight)
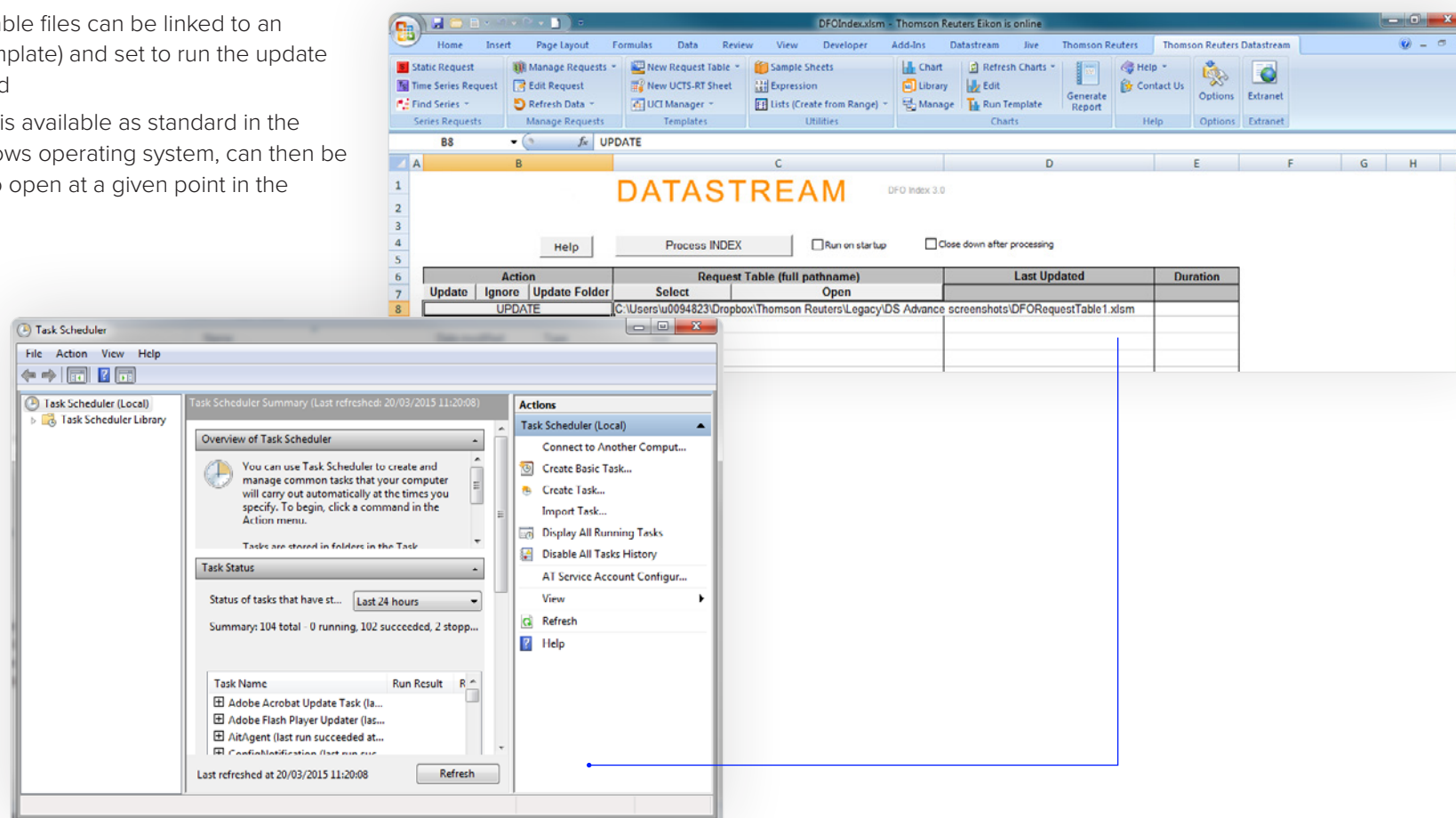
Company accounts data (fundamentals)

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

- Access fundamentals including:
  - Income statement, balance sheet and cash flow
  - Operating metrics, segments and major customers
  - Ratios and earnings quality
- Refinitiv® Worldscope datatypes can be downloaded for lists of stocks using yearly frequency time series requests
- Pre-built Excel files for balance sheets, income statements and cash flow statements are available via the Templates button on the Refinitiv tab in Excel
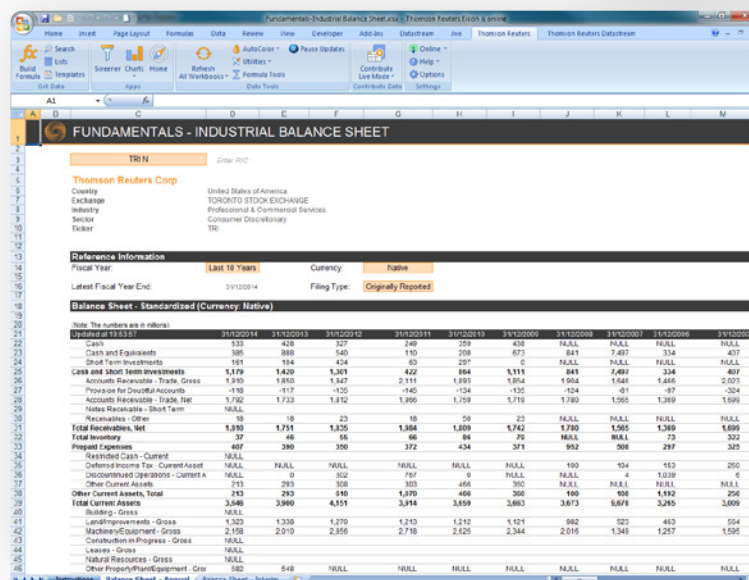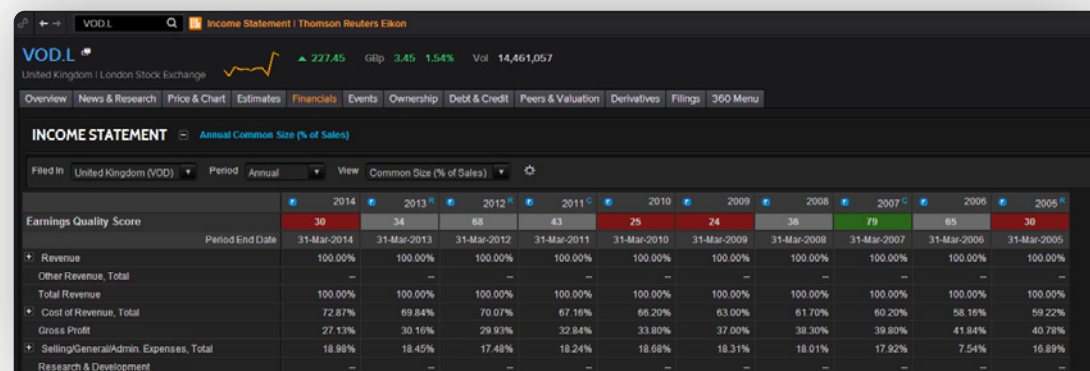
Capital issues and changes (corporate actions)

Type the company name or code followed by **corporate actions**, or utilize the Datastream add-in's templates and datatypes

- The Eikon corporate actions calendar allows you to review historical corporate actions which have resulted in price adjustments (capital change, dividends, mergers and acquisitions, bond issuance, dividends, etc.)
- Data can be combined within existing Excel models and files (versus the standalone report in Datastream Advance)
- For the corporate action Datastream for Office (DFO) sample sheet, go to the Datastream tab and select **sample sheets** and **corporate actions history template**

Dividend payment report

Type the company name or code and **dividends** and select **Dividend Overview**, or use the Datastream add-in to choose from a selection of relevant datatypes in Excel

- The Dividend Overview report displays dividend payment history, current and forecasted dividend yields (in chart format), payout ratios, coverage and forecasted dividend cash flows
- The dividend payment detail view shows net/gross dividend ex-date and pay date
- Data can be combined into Excel as well, using the preformatted corporate actions template request in Excel
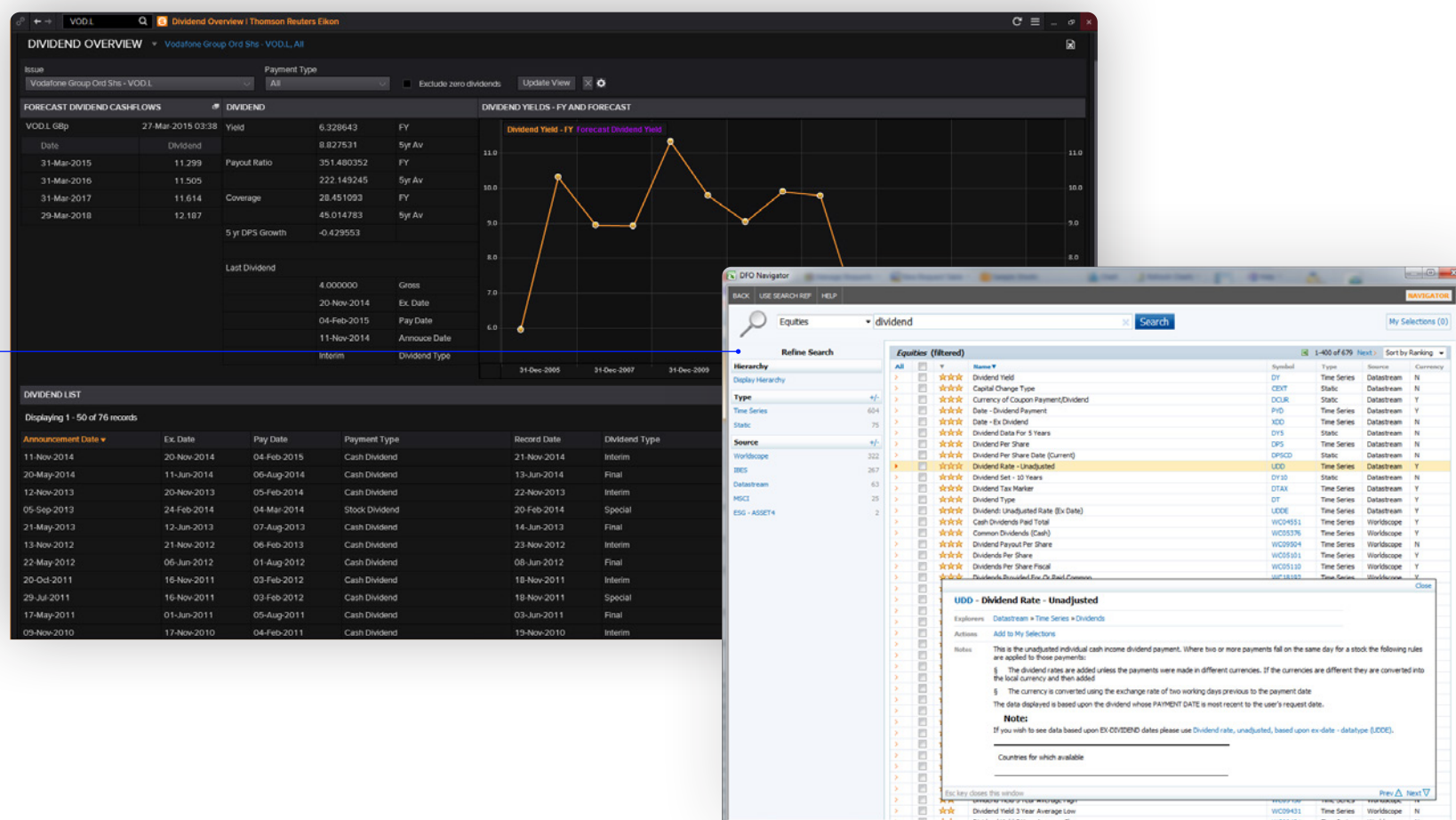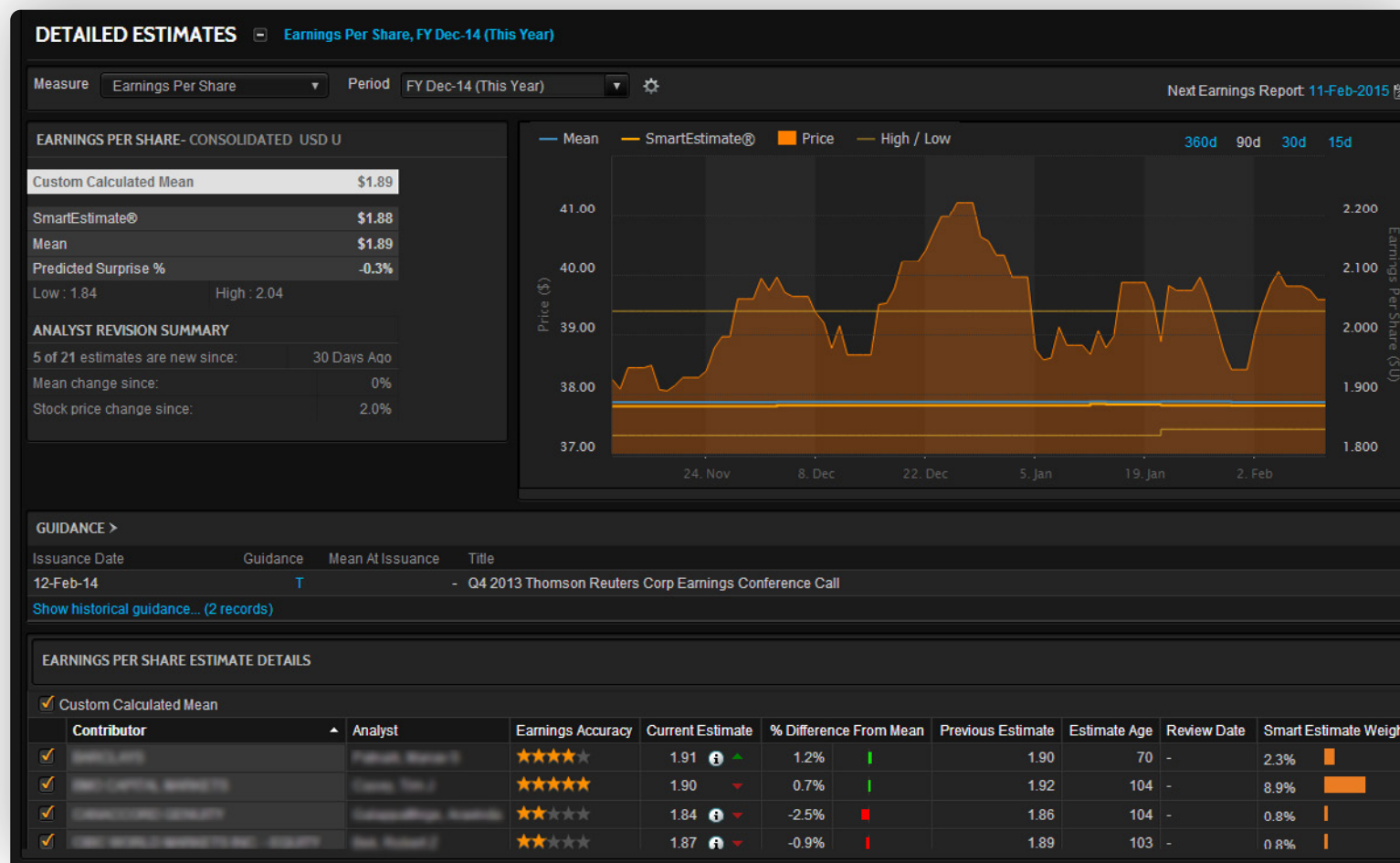
Detailed estimates

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

- Break out each measure by broker to see the underlying detail, for a single period or full year
- Eikon offers more measures, a vastly superior chart view, plus Refinitiv® 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, and 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 the 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.

DETAILED ESTIMATES — Earnings Per Share, FY Dec-14 (This Year)

Measure: Earnings Per Share | Period: FY Dec-14 (This Year) | Next Earnings Report: 11-Feb-2015

EARNINGS PER SHARE - CONSOLIDATED USD U

Custom Calculated Mean	$1.89
SmartEstimate®	$1.88
Mean	$1.89
Predicted Surprise %	-0.3%
Low : 1.84	High : 2.04

ANALYST REVISION SUMMARY

5 of 21 estimates are new since:	30 Days Ago
Mean change since:	0%
Stock price change since:	2.0%

GUIDANCE >

Issuance Date	Guidance	Mean At Issuance	Title
12-Feb-14	T	-	Q4 2013 Thomson Reuters Corp Earnings Conference Call

Show historical guidance... (2 records)

EARNINGS PER SHARE ESTIMATE DETAILS

☑ Custom Calculated Mean

| Contributor	Analyst	Earnings Accuracy	Current Estimate	% Difference From Mean	Previous Estimate	Estimate Age	Review Date	Smart Estimate Weight
☑		★★★★☆	1.91	1.2%	1.90	70	-	2.3%
☑		★★★★★	1.90	0.7%	1.92	104	-	8.9%
☑		★★☆☆☆	1.84	-2.5%	1.86	104	-	0.8%
☑		★★☆☆☆	1.87	-0.9%	1.89	103	-	0.8%

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 Refinitiv® Financials, I/B/E/S Estimates and unique content sources like StarMine Quantitative Analytics
- Perform basic data analysis such as sorting, grouping and aggregation 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
- A multifactor ranking capability with drilldowns helps you understand which factors contribute most to overall rank

View and select data ranges in visual histograms to easily adjust.
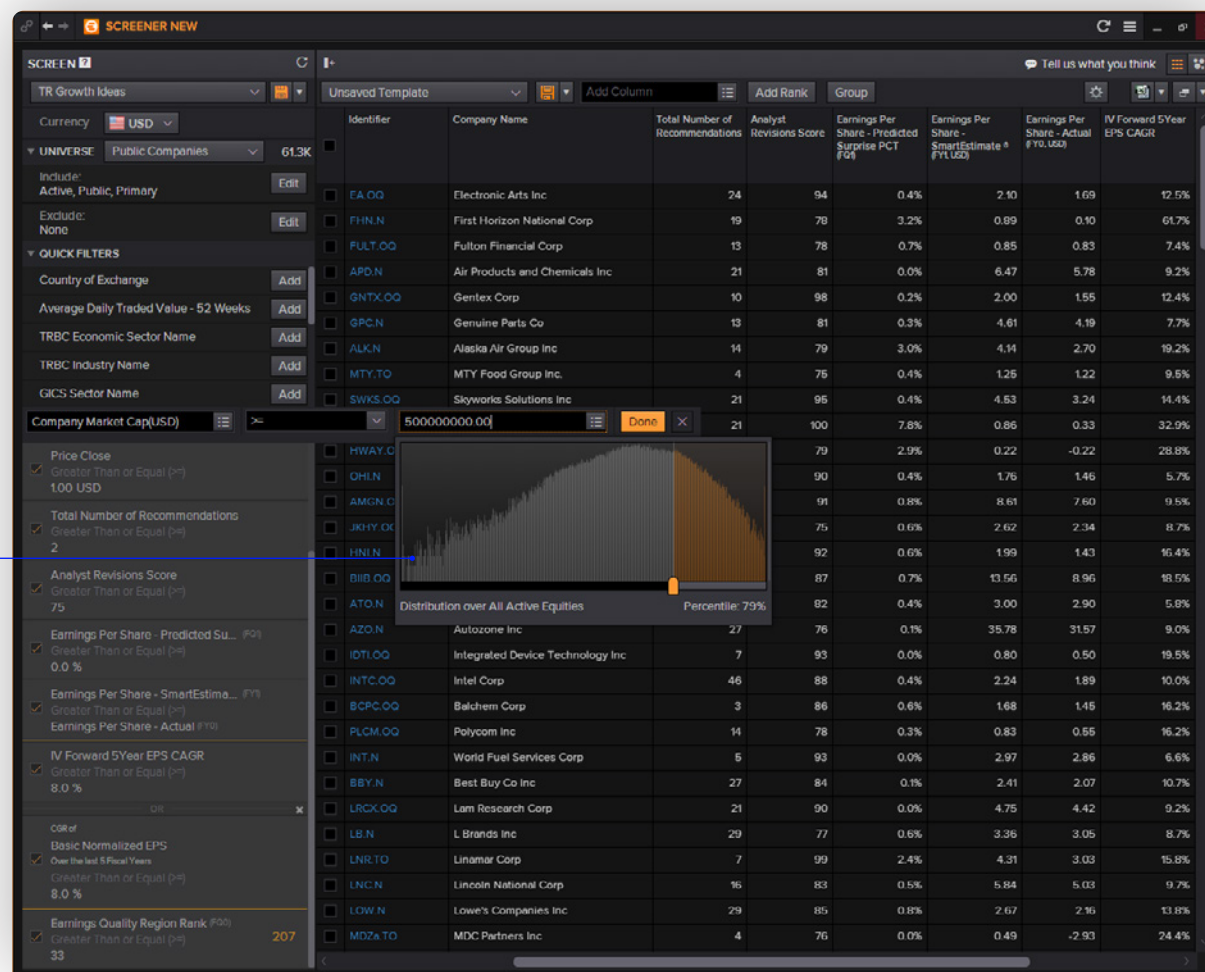
Macro Explorer

To access, type Macro Explorer or MACROX

- The Macro Explorer app offers compelling macroeconomic data visualization features to help you identify investment opportunities
- This intuitive app offers highly interactive market selection filters that allow you to:
  - Access hundreds of indicators to gain historical insight across markets
  - Screen for markets that meet a wide range of performance or risk criteria
  - View natural language-generated insights with contextualized summaries of the data in view
  - Display an interactive sector heat map with dozens of aggregate fundamentals available to choose from
  - Search for deeper trends and multiple indicator comparisons using moving grids and scatter plots
  - Visualize the real-time performance of your watch lists, portfolios and a selection of cross-asset benchmarks on our world map view
  - Navigate to country overview pages for further investigation
  - Export data to Excel for further analysis

The Macro Explorer app provides access to hundreds of indicators spanning historical and forecast data from 1990 to 2016. Indicators are grouped into five main categories:
- Key indicators • Oxford Economics • World Bank WDI
- Premium content from Fathom Consulting, IFO and Ipsos
- International comparable economics

The world map view allows you to compare multiple countries within the selected regions or groups.

Performance reports

To access, type **MON** to open the Monitor app and add the instruments using free text search – or you can use templates or formulas in Excel

- Display performance and valuation ratios for a quote list and sort results, allowing greater flexibility in items that can be displayed versus Datastream standalone performance reports
- Access items in Excel using the performance data sample sheet in DFO, or build your own data requests using Datastream's function and expression tools
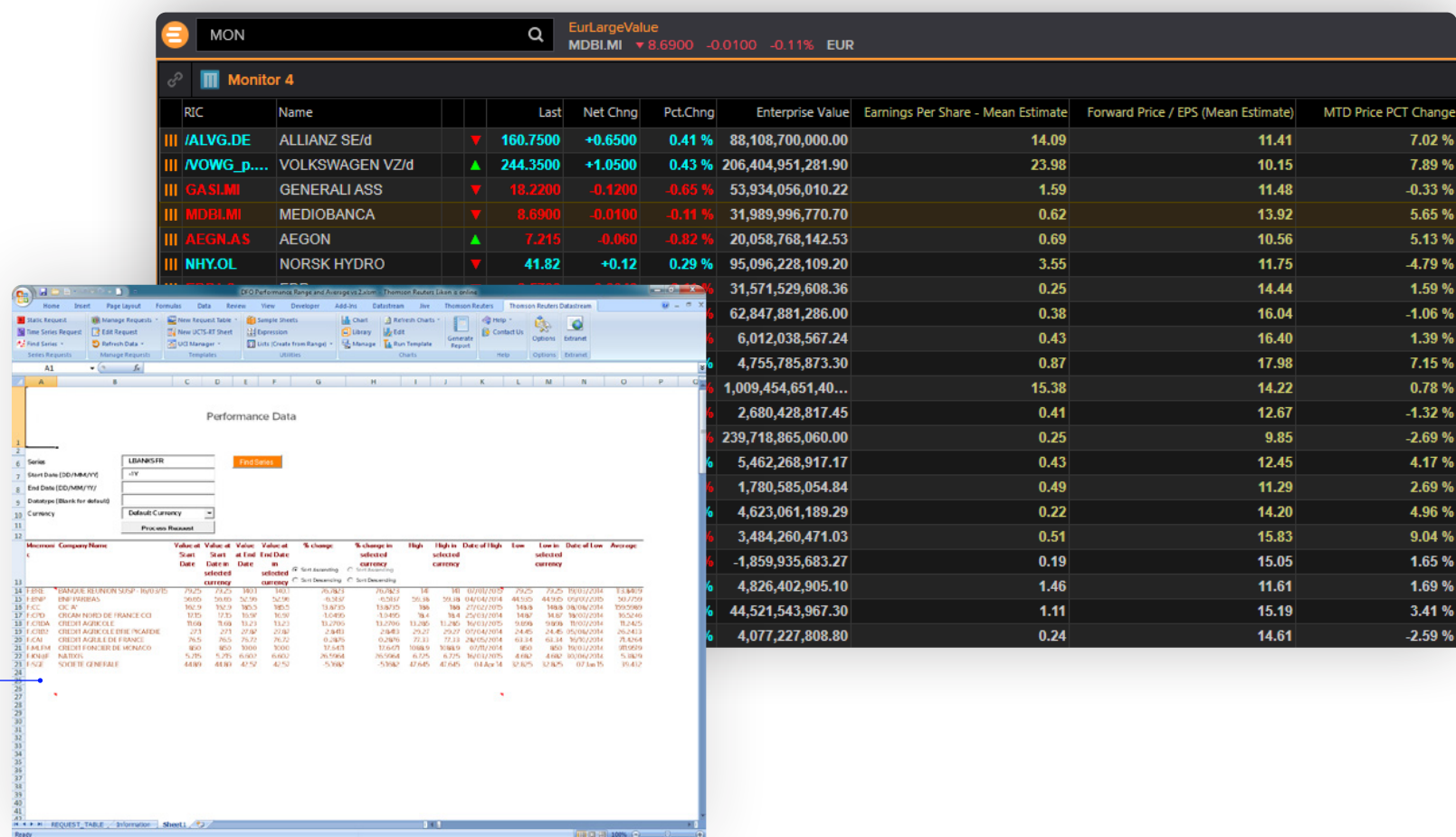
Economic Monitor

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 Microsoft 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 and 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 EU aggregates
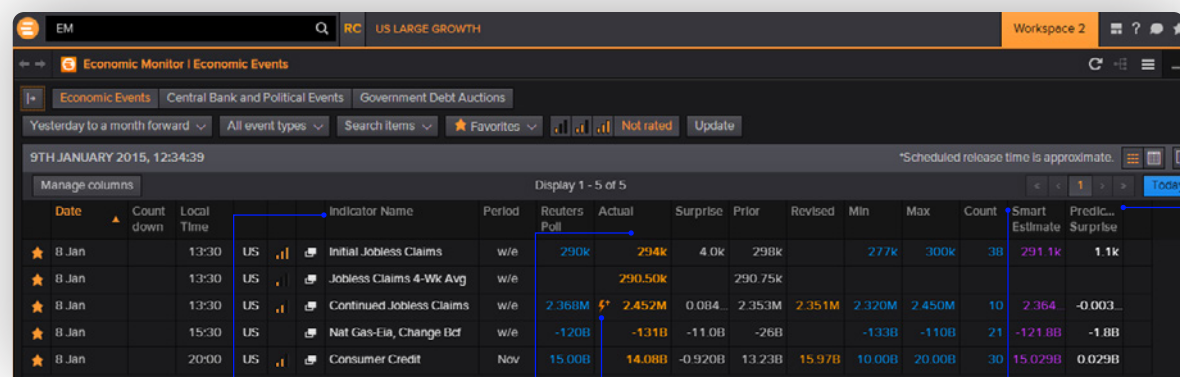
Click on the indicator name to view a historical chart.

Actuals are shown next to Reuters Poll results.

Shockwave indicators appear when the actual is outside the range of expectations.

SmartEstimates can help you better predict the direction of macro surprises relative to the consensus forecast.
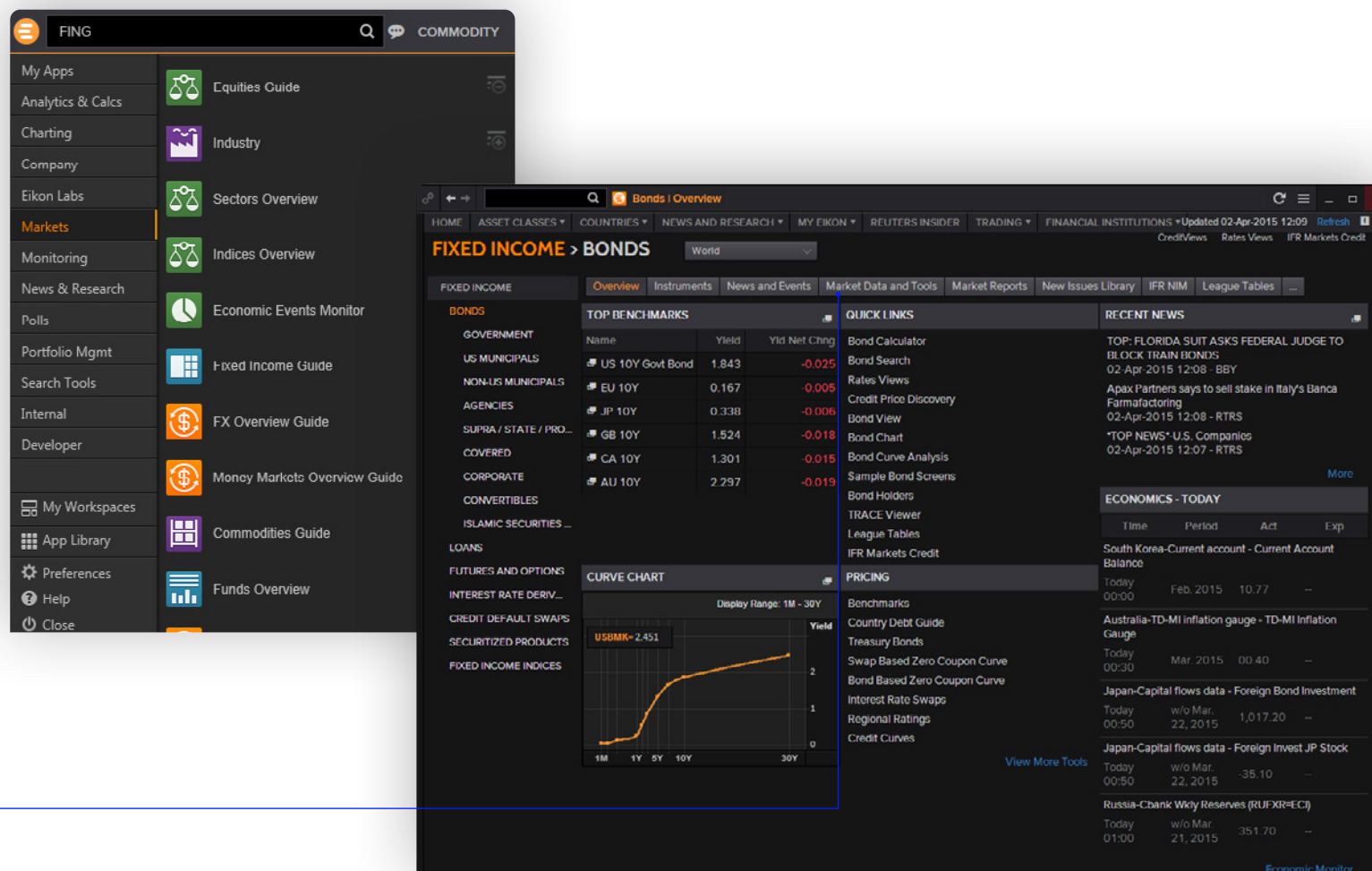
Surprise readings can be used to anticipate market-moving announcements.
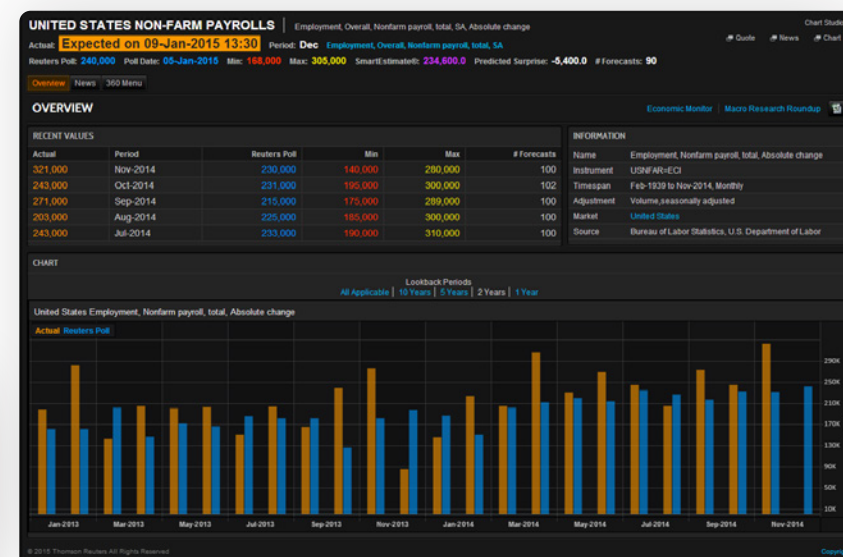
Cross-asset guides

Click ⬛ > Markets and select the guide of interest; alternatively use free text search or the codes in orange below

- Eikon offers easier access to cross-asset content, with guides for:
  - Equities
  - Fixed income
  - FX
  - Money markets
  - 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

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 gives 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

Share your research internally over Eikon

- In Eikon you can format and publish internal research and documents
- Select your preferred layout to co-mingle internal and external broker research, or keep it separate
- Other internal research features include the ability to:
  - Set alerts
  - Access internal research via the News app in real time
  - Incorporate information into charts as internal research overlays

Contact your Refinitiv Account Manager to request access to the internal research publishing capabilities.

Enhanced alerting

- Create alerts for market data, news, research (internal or external), filings and events
- Create real-time/scheduled email alerts
- Receive alerts by email or pop-up within Eikon and on your mobile
- Click on the bell icon on the top right of the toolbar to set up your alerts

Mobile

To access, download the Eikon app or access Eikon via a Web browser

- Get real-time, breaking headlines from all over the world
- Access real-time pricing 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 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 Web page and extract related content from Eikon for companies, industries, countries and people profiles
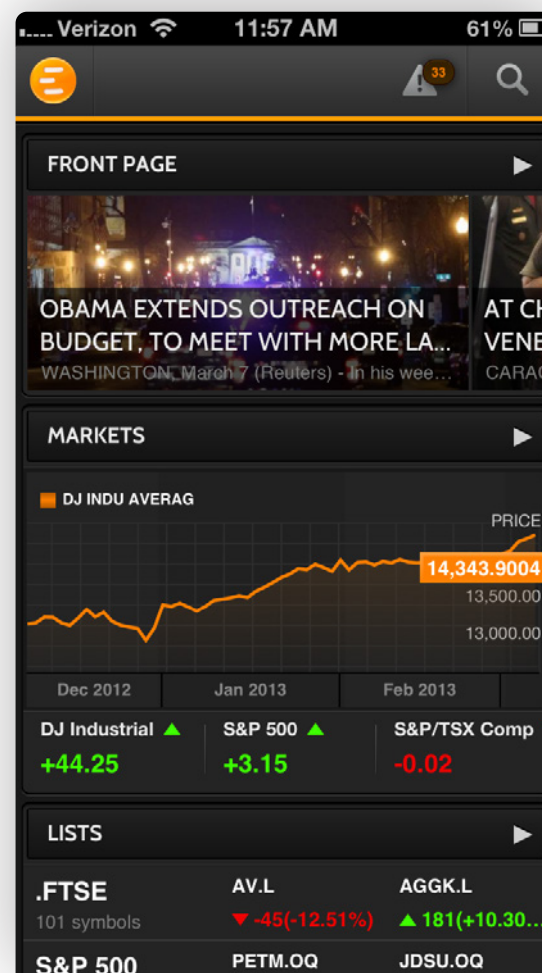
Download the universal Eikon App for iPhone and iPad from the Apple® App Store.

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.

Get support on Eikon

Please contact your account manager

Or go to 🟠 > **Help** > **Contact Us**

You can contact Refinitiv Customer Support any time using Messenger.

Click 🟠 on the toolbar to open Messenger.

Click **Customer Support** in the ungrouped category of contacts and type your message.

Visit **refinitiv.com**

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