

THOMSON/REFINITIV DATA THROUGH WHARTON RESEARCH DATA SERVICES (WRDS)



13F INSTITUTIONAL HOLDINGS

Access Institutional Common Stock Holdings and Transactions, as reported on Form 13F filed with the SEC by institutional managers with \$100 m or more in Assets Under Management.

GLOBAL OWNERSHIP HOLDINGS

A comprehensive collection of global equity ownership data for institutions, mutual funds and insiders. Ownership coverage spans 13F institutions, mutual, pension, and insurance funds, for securities trading in than 70+ countries.

I / B / E / S

Data provides both summary and individual analyst forecasts of company earnings, cash flows, etc.

I / B / E / S GLOBAL AGGREGATES

Extract earnings forecasts plus related data for 87 countries and major international indices — global asset allocation, cross-border valuation, sector and industry aggregation and derivatives.

I/B/E/S KEY PERFORMANCE INDICATORS (KPI)

Effectively evaluate a business and how likely it is to perform in the medium and long terms.

I / B / E / S GUIDANCE

Directly compare analyst and management expectations on company performance for over 8,200 companies, safe in the knowledge that they are using the same accounting basis for consistent analysis.

I / B / E / S KEY PERFORMANCE INDICATORS (KPI)

KPIs allow researchers to effectively evaluate a business and how likely it is to perform in the medium and long terms.

INSIDER FILINGS (IFDF)

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/Refinitiv that adds value by making systematic interpretations on the accuracy of as-reported data and inserts “cleansed” fields for comparison.

MUTUAL FUNDS

Extract security holding information for all registered mutual funds that report their holdings with the SEC, plus 3,000 global funds.

SDC M&A

Track changes in economic ownership at ultimate parent level in going business concerns 150+ data elements, including target and acquirer profile information, deal terms, financial and legal advisor, stock premia, synopsis history, deal status, and more.

▲ **COVERAGE FROM 1970**

SDC NEW ISSUES

Access issues of global equity and equity-related securities, including offerings of common stock (includes IPOs, secondary offerings, and Rule144a stock offerings), convertible debt, and convertible preferred stock.

THOMSON/REFINITIV LIPPER HEDGE FUND (FORMERLY TASS)

Data contains 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.

THOMSON/REFINITIV DEALSCAN

The world’s pre-eminent source for extensive and reliable information on the global syndicated bank loan market, this robust database contains detailed terms and conditions on over 240,000 loan transactions.

WORLDSCOPE

Access comprehensive, accurate and timely fundamentals and stock 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/Refinitiv. Worldscope addresses this complexity by utilizing uniform definitions and standardized statement organization.

ABOUT WRDS

Wharton Research Data Services (WRDS) provides the leading business intelligence, data analytics, and research platform to global institutions — enabling comprehensive thought leadership, historical analysis, and insight into the latest innovations in academic research. WRDS provides researchers with one location to access over 350 terabytes of data across multiple disciplines including Accounting, Banking, Economics, ESG, Finance, Healthcare, 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, R and more. Our rigorous data review and validation give users the confidence to tailor research and create a wide range of reliable data models. WRDS unique array of Services offer access to a suite of analytics developed by our doctoral-level research team, tutorials, research support, and *Classroom by WRDS* — a teaching and learning toolkit designed to introduce business concepts in the classroom. The WRDS *Experience* is more than just a data platform.

WRDS is a leader in impactful research. Through a partnership with SSRN, WRDS is elevating the visibility of universities and researchers working across an array of fields. The WRDS Research Paper Series is a searchable repository of all papers submitted to SSRN that cite WRDS in their work. In addition, the two organizations have launched the *WRDS-SSRN Innovation Award™* to honor emerging business schools in North America, Asia-Pacific, and EMEA.

An award-winning data research platform for 50,000+ commercial, academic, and government users in 35+ countries, 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 world's first collegiate business school, the Wharton School of the University of Pennsylvania is shaping the future of business by incubating ideas, driving insights, and creating leaders who change the world. With a faculty of more than 235 renowned professors, Wharton has 5,000 undergraduate, MBA, executive MBA, and doctoral students. Each year 18,000 professionals from around the world advance their careers through Wharton Executive Education's individual, company-customized, and online programs. More than 98,000 Wharton alumni form a powerful global network of leaders who transform business every day. For more information, visit www.wharton.upenn.edu.

ABOUT THOMSON/REFINITIV

Serving more than 40,000 institutions in approximately 190 countries, Refinitiv provides information, insights and technology that drive innovation and performance in global financial markets. Our heritage of integrity enables our customers to make critical decisions with confidence while our best-in-class data and cutting-edge technologies enable greater opportunity.

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