# Using SDC Platinum for M&A and IPO

Where to access SDC: <u>http://researchguides.smu.edu.sg/istudio</u>

Basic steps:

Double-click on SDC Platinum icon on the desktop. Log in with "smu" for user initials, and enter in any "project description" you wish.

- 1. Select Database
- 2. Select Date Range
- 3. Select filters to apply in your search
- 4. Execute search
- 5. Select data items for report
- 6. Execute report
- 7. Export and save report

Illustrated steps:



On desktop:

smu	nter user initials:	
1	OK Cancel	
SD	C	<u>O</u> ptions
		Help
1	Platinur	<u>n</u> <u>Exit</u>

Login:

1. Select Database

### IPO (Global Issues)

Database Selection		
VentureXpert	Securities Trading	Global Public Finance
Global New Issues Databases Mergers & Acqu	isitions Corporate Governa	ance Corporate Restructurings
<ul> <li>All Equity</li> <li>Common Stock</li> <li>Convertible</li> <li>Equity Pipeline and Registrations</li> <li>Private Equity</li> </ul>	<ul> <li>All Bonds</li> <li>Non-Convertible Book</li> <li>Preferred Stock</li> <li>Mortgage/Asset Bao</li> <li>Bonds Pipeline and</li> <li>MTN Programs</li> <li>Private Debt</li> </ul>	icked <u>C</u> ancel
All Syndicated Loans		

#### M&A

Database Selection		
VentureXpert	Securities Trading	Global Public Finance
Global New Issues Databases	Mergers & Acquisitions Corporate G	iovernance Corporate Restructurings
	<ul> <li>US Targets</li> <li>Non-US Targets</li> <li>Joint Ventures/Alliances</li> <li>Repurchases</li> </ul>	<u>O</u> K <u>C</u> ancel <u>H</u> elp <u>B</u> illing

2. Select Date Range:

Dates: Issue Date	<b>×</b>
Calendar Dates Fiscal Dates	
← Last         1         ↓         Quarter         ▼	ОК
C This Day 💌	Cancel
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C Custom 1/10/2018	

3. Select filters to apply:

### (M&A example) Double click on the filter

Search Items					×
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	y Interest Flag Stock Exchange In escription, Full (UP Industry ictor Industry y istry y jion IC tion Region				Open Close <u>H</u> elp Definition

(IPO example) Double click on the filter

Search Items					<b>×</b>
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After double-clicking on the filter, conditions for the filter appear.

Select a condition by double-clicking the row and ensuring that there is a red checkmark.

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	Cook Islands	CK	
	Federated States of Micronesia	MN	
	Fiji	FJ	
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	Guam(United States)	GZ	
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When you are done selecting the filters and conditions, you will return to the main session screen:

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Request 0: Database used

Request 1: Date range

Request 2 onwards: lists all the filters you have applied

# 4. Click on the "Execute" button to begin your search:

# (IPO example)

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#### (M&A example)

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### After executing the search, you will see the number of results ("Hits") on screen.

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To view details of the results, generate a report. Go to file > Report > "New Custom..." to build a report from scratch.

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### 5. Select data items for report

#### (M&A example)

💷 SDC Platinum

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### 5. Select data items for report

#### (IPO example)

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Click OK once you have finished selecting all your data report items. You will see a list of report items you have selected on the "Design Custom Report Format" screen. Click OK.

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6. Execute the report

You will return to the Session screen. The last row will show that you have created a Custom Report. Click on the "Execute" button again to run the search and display results in your custom report.

#### (M&A Example)

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#### (IPO Example)

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# A report will be generated in SDC programme:

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### 7. Export the report to Excel

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# There are three types of files that can be saved for future use in SDC:

- 1. Session
- 2. Custom Report
- 3. Report (results)

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2. "Custom Report" – saves your report format which is a listing of data items that you want to display in your final report

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3. "Report" – final results. This can be saved as an Excel file.

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Please remember to save a copy of files to your thumb drive or other location as the public PCs in the library may be reformatted for security and efficiency.