

# DATASTREAM USER CREATED INDICES

## QUICK REFERENCE CARD

### QUICK STEPS FOR SETTING UP A USER CREATED INDEX

Create your own indices on Datastream to use in combination with Datastream maintained series in charts and data requests, with the full power of the Datastream expressions language.

1 Download the UCI template from the Create Index page

**Building Your Constituent Lists** [List All Indices](#) [Download Template](#)

Note: to build your list use the UCI [template](#) or cut and paste the constituents from Excel using one of the formats below. Click [here](#) for more details on the UCI template and Manager features.

[Paste your constituents data block here]

[Upload constituent data »](#)

2 When all details are filled in – select the Save UCI option to create the index

Add series from Navigator individually or using a constituent list such as the Retailer UK (LRTAILUK)

Delete an equity from the index

Select a datatype to use to filter the series by (such as Industry)

**THOMSON REUTERS DATASTREAM** UCI 5.0 [UCI Help](#)

[Load UCI](#) [Save UCI](#) [Add Series](#) [Add List](#) [Delete row](#) [Clear sheet](#) [New sheet](#) [Datatype 1](#) [Datatype 2](#)

Ref number	Mnemonic	Description	Base date
1	RTLUK	UK Retailers Ex Tesco	01/01/2000

DS code	Mnemonic	Name	Base date	Date in	Date out	Industry Level 6 Subsector	Name of Datatype 2
11	910215	ALY	ASHLEY(LAURA) HOLDINGS	04/12/1985		Home Improvement Ret.	
12	914327	BRWN	BROWN (N) GROUP	01/04/1970		Apparel Retailers	
13	319752	CPR	CARPENTRIGHT	22/06/1993		Home Improvement Ret.	
14	35793C	DEB	DEBENHAMS	03/05/2006		Broadline Retailers	
15	28747H	DTY	DIGNITY	01/04/2004		Spec Consumer Service	
16	900906	DSGI	DSG INTERNATIONAL	30/12/1964		Specialty Retailers	
17	41275C	DNLM	DUNELM GROUP	18/10/2006		Home Improvement Ret.	
18	910532	GMG	GAME GROUP	05/07/1985		Specialty Retailers	
19	952780	GREG	GREGGS	03/05/1984		Food Retail, Wholesale	
20	28745P	HFD	HALFORDS GROUP	02/06/2004		Specialty Retailers	
21	258045	HMV	HMV GROUP	08/05/2002		Specialty Retailers	
22	901199	HOME	HOME RETAIL GROUP	30/12/1964		Broadline Retailers	

Series mnemonics & lists can be typed in directly (including local lists file names)

Enter a mnemonic, description and base date to use for the index

Enter a date for when the series should be added or removed from the index

Apply filters as required to remove equities

3 **Create Indices** [List All Indices](#)

Select the currency and the weighting method (market value, free float, etc)

Select if the index should calculate once (trial) or updated each night (auto)

Select further page for additional datatypes – such as Sales, EV/EBITDA

**Create Indices** [List All Indices](#)

Description: UK Retailers Ex Tesco

Mnemonic: RTLUK

Base Date: 01/01/2000

End Date: 19/07/2009

Base Value: 100

Currency: UK Pound

Weighting: Market Value

Calculation Type: Trial

[Back](#) [Next : set index datatypes »](#) [Finish : create index](#)

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4 Select the required datatypes and press Finish to create the index

**Create Indices** [List All Indices](#)

Available:

- Market Value
- Return Index
- Dividend Yield
- Price Earnings Ratio
- Return Index (net)
- Dividend Yield (net)
- Turnover by Volume
- Turnover by Value
- Sales (Revenue)
- Net Profit (Income)
- Net Debt
- Employees No

Selected:

- Price Index
- Sales (Revenue)
- EV / EBITDA

[Add >>](#) [<< Remove](#)

[Back](#) [Finish : create index](#)

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## EDITING AN INDEX – USING THE UCI TEMPLATE TO MODIFY THE CONSTITUENTS

1

Change the Description or the Mnemonic

Change the base date or currency – or switch the calculation (Trial or Auto)

Display list of UCIs on the ID

See report on the calculation – or chart the index in Datastream Charting

Index Detail

[List All Indices](#) [Create Indices](#) [Download Template](#) [Back](#)

**Index Settings** [\[Edit\]](#)

**Mnemonic** X%RTLUK  
**Description** UK Retailers Ex Tesco  
**List Type** Private  
**Weighting** Market Value

**Index Calculation** [\[Calculate\]](#)

**Calculation Type** Trial  
**Base Date** 01/01/2000  
**Base Value** 100.0000  
**Currency** UK Pound  
**State** Calculated

**Index History**

**Created** 06/03/2009  
**Amended** 20/07/2009  
**Requested** 20/07/2009  
**To Be Halted** N/A

**Index Datatypes**

☒ EV / EBITDA  
☒ Price Index  
☐ Sales (Revenue)

**Edit Index Constituents via:** [UCI template](#) [\[Export: in/out format\]](#) [\[Export: dated columns format\]](#) [\[Reload\]](#)

Click [here](#) for more details on each of these options.

Mnemonic	Code	Description	Available	In Date
ALY	910215	ASHLEY(LAURA) HOLDINGS	04/12/1985	04/12/1985
BRWN	914327	BROWN (N) GROUP	01/04/1970	01/04/1970
CPR	319752	CARPETRIGHT	22/06/1993	22/06/1993
DEB	35793C	DEBENHAMS	03/05/2006	03/05/2006
DTY	28747H	DIGNITY	01/04/2004	01/04/2004
DSGI	900906	DSG INTERNATIONAL	01/01/1965	01/01/1965
DNLM	41275C	DUNELM GROUP	18/10/2006	18/10/2006
DSM	04555B	DSM GROUP	05/07/2005	05/07/2005

Select which datatype to display in the chart

Select to download the template if editing the constituents of an existing index

Select to export and import constituents' sets direct to Excel without using the Template

Price Index

Source: Thomson Reuters Datastream

2

Select the Load UCI button to select from Navigator the index constituents you want to edit

Press the Clear Sheet button if the Template has been used to create or edit another index

THOMSON REUTERS DATASTREAM UCI 5.0

[Load UCI](#) [Save UCI](#) [Add Series](#) [Add List](#) [Delete row](#) [Clear sheet](#)

Ref number	Mnemonic	Description	Base date
Mandatory to enter a Mnemonic (max 6 characters) to create an index			
DS code	Mnemonic	Name	Base date
11			
12			

When editing the constituents of an index – the Reload option is selected

3

Datastream UCI: saving

There are several ways you can save your index. Choose the one that meets your requirements.

☒ Create

Creates a new UCI with mnemonic X#RTLUK, or replaces the existing UCI with this mnemonic.  
 Reads all list metadata, constituents and their date ranges from the sheet.

☒ Reload

Changes UCI X#:X01619 by replacing its constituents and their date ranges from the sheet.

☐ Append - available only for automatic indices

Changes UCI X#:X01619 by appending the sheet's current list as the index's constituents.  
 Available only for automatic indices; this one is a trial index.

[OK](#) [Cancel](#)