CONQUER THE 601

with Company Research Skills

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Today’s Agenda

1. Public, Private & Nonprofit
2. Private Company Research
3. Public Company Research
4. Nonprofit Research
5. Competitor Analysis
6. Article Research

601 Slides & Guides: bit.ly/601mba
The Five Questions Approach

R1 What business is the company in & what are its goals?

R2 How successful is the company? And why?

R3 What are the company’s prospects for the future?

R4 What fundamental issues, choices, & alternatives face the company?

R5 What strategy & specific actions should the company take to become more successful?
The Five Questions Approach

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Today’s Session will:

- Help YOU find resources to answer questions R1-R4
Why is this important?

Indicates how much information you can find about a specific organization.
Differences between public, private, & nonprofit

**Publicly-traded**
- Traded on stock exchange
- General public can invest
- Must follow securities regulations & produce various filings

**Privately-held**
- May have shares, but general public can’t buy them
- Can be small, medium, or large
- Typically not subject to securities regulations

**Nonprofits**
- Typically registered charities
- Produce financial information for tax agencies (CRA & IRS)
- Have different missions than public & private companies

Video: What makes a company public or private?
Private Company Research
Fiesta Farms: A well-known local supermarket in downtown Toronto
Reliance Home Comfort: An HVAC contractor in York, Ontario

“In the event of a water heater or HVAC equipment breakdown, I know Reliance will be on site within 4 hours”

— Reliance Business Customer
Key Databases

- **Mergent Intellect**
  - Publicly traded and private companies
- **PrivCo**
  - Over 400,000 private companies

Other Options

- **Bloomberg**
  - PSRC Go - > Private company screener tool
- **Canadian Company Capabilities**
  - Government of Canada
- **Marketline**
  - Some larger private companies
- **Factiva**
  - Companies/Markets section
  - Some larger private companies

Tips: Consult **BRYT** Private Company Video and **Private Companies section** of the Company Research Guide
Mergent Intellect

Mergent INTELLECT™ by FTSE Russell

Make sure that this is deselected so that Canadian companies are found!
Lots of great search options in PrivCo!
### Company Examples

#### B2C:
- Metro Inc.
- Loblaws

#### B2B:
- Enercare (caters to commercial and residential sectors)
### Company Filings

#### Library Subscription Sources
- **Lexis Nexis Securities Mosaic**
  - North American - SEDAR & EDGAR
- **Mergent Online**
  - International
  - Click on the reports link for the selected company

#### Free Sites – Securities Regulators
- **SEDAR**
  - Canada
- **EDGAR**
  - United States

Check out:

- Video on How to Find an Annual Report in Lexis Nexis Securities Mosaic
- Guide to finding annual reports/filings
Key Databases: Profiles, Financials, SWOTS & more

R1, R2, R3

- **Mergent Online**
  - Publicly-traded companies

- **Factiva**
  - Click on companies/markets tab to search for companies

- **Marketline Advantage**
  - Useful for SWOTs and case studies

- **Lexis Nexis Academic**
  - Useful for SWOTs / [user guide for Lexis](#)

Public Companies section of the Company Research Guide
Analyst Reports

- Thomson One (Investext Plus)
  - International coverage
  - Publicly-traded companies
  - Use IE11 browser: configuration document

Videos on analyst reports and researching company strategy from BRYT

Analyst reports on the Company Research Guide
Bloomberg is a real-time financial service. Provides current and historical data, news and financial analysis of companies, equities, fixed income, bonds, indices, foreign exchange, commodities. Economic statistics are also available.

- Our Bloomberg Guide covers:
  - How to book terminal
  - How to set up an account
  - Training options – BMC
  - Key content and commands

Tip: Check out our Finance Guide and the Suppliers section of our company guide for more help
Sustainability & ESG Reports

Sustainalytics rates companies on environmental, social and governance performance.

For more resources check out the Sustainability section of the Corporate Governance Guide and CSR Tutorials on BRYT.
Non Profit Research
Non-Profit Research

Canadian Nonprofit Financial Information
• **What:** Form T3010 on [Canada Revenue Agency site](https://www.canada.ca/en/revenue-agency/services/tax Charitable捐赠的)

Other Information Sources
• The charity’s website (look for items like annual report)
• Article database searches
• Governance resources like [Charity Intelligence](https://www.charityintelligence.ca/)

For more resources check the [Non-profit Research Guide](https://www.nonprofitresearchguide.com/)
Non-Profit Research

T3010 on CRA website

Basic search

Charity name

daily bread food bank

Charity status

Registered

Search

Revenue

- Receipted donations $622,550 (23%)
- Non-receipted donations $231,404 (8%)
- Gifts from other charities $110,897 (4%)
- Government funding $85,039 (3%)
- All other revenue $1,680,804 (62%)

Total revenue: $2,730,694

Charity Intelligence Reports

Charity Intelligence Canada

DAILY BREAD FOOD BANK

Sector: Social Services - Food Banks (Distributor)
Operating Charity

About Daily Bread Food Bank: Since 1983, Daily Bread Food Bank (DBFB) has been working with the poor and needy in Toronto. DBFB is the largest provider of food relief in the GTA. In 2013, DBFB distributed over 9.8 million pounds of food to approximately 200 food banks and meal programs across Toronto and provided food hampers for almost 764,000 visits. In addition, DBFB operates a number of programs designed to fight hunger and tackle the root problem of...
Competitor Analysis
The Value of Industry Codes

- Fundamental when researching competitors in one or more industries
- Codes group competitors together operating in the same line of business
- Define industries broadly and narrowly using a hierarchical numbering system
- Individual companies may have a primary code, and one or more secondary codes
Searching for Competitors

Key Databases

• A sampling of some databases that allow searching by one or more industry code systems like NAICS or SIC

Check out: the competitors section of our Company Research Guide, and 1) Creating Company Lists with Hoovers and 2) Creating Company Lists with Lexis Nexis Academic
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Searching for Competitors
Mergent Intellect

ADVANCED SEARCH
The Advanced search page lets you refine your search in various ways. You can drill down into your search to get as granular as you may need.

Start here to begin building a list of companies to match specific criteria.

JOB SEARCH
Database has over 20 million employers in the U.S.; over 400,000 employers in Canada, and over one million employers in Mexico. Allows career seekers...
5. Build and Download a Competitors List with Simply Map Canada

Includes D&B Premium Canadian Company Database

Company lists may be exported to Excel
Competitor Analysis – Print Directories

Bronfman Business Library: Reference Collection

Key examples:
- Canadian Key Business Directory: HG 4090 Z5 C3
- Scott’s Directories: T 12.5 C22 O6
- Ontario Business to Business Sales and Marketing Directory: HF 3229 O5 O56
Articles Research
6 Business Article Databases

**Proquest Business**: Excellent source of scholarly & trade articles

**Business Source Complete**: Excellent source of scholarly & trade articles

**Factiva**: Excellent source of Canadian & international news articles

Consult: [Finding Business Articles Video](#) and The [Finding Business Articles Guide](#) Help you build effective search strategies!
We’ve covered...

1. Public, Private & Nonprofit
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5. Competitor Analysis
6. Article Research
Industry & Market Research Workshops

Tues June 13th
5:30pm-6:45pm

Resources covered include:

- IBISWorld
- vividata
- MarketLine
- Passport

And more!

Contact us:

- Email: bronfref@yorku.ca
- Phone: 416-736-5139
- IM chat:
- Drop-in reference hours
- Today’s slides: bit.ly/601mba