Course research guide with link to slides:
http://researchguides.library.yorku.ca/ADMS_4551
Getting Help at the Bronfman Library

Resources for ADMS 4551 Group Assignment
  - Annual Reports
  - Company Information
  - Industry Information
  - Analyst Reports
  - Finding Articles

Citation & APA
Resources for Auditing Assignment

- Annual reports
- Company information
- Industry information
- Analyst reports
- Finding articles

Objectives

- Access **best resources for project**
- Illustrate **how to search resources effectively**
- Outline some **APA citation resources**
Summer Term Hours:
- Monday-Thursday: 9am-10pm
- Friday: 9am-5pm
- Saturday: 10am-6pm
- Sunday: 12am-8pm
August hours: 9am-5pm (M-F)

Getting Help:
- Phone: 416-736-5139
- Reference email: bronfref@yorku.ca
- IM chat service available on Bronfman website
Subject Librarian for Accounting & Auditing

- Stephanie Quail
- Email: quailste@yorku.ca
- Phone: 416-736-2100 ext. 22747
- Office: Bronfman Library, S237V

Learn more about subject librarian expertise at the Bronfman Library!
Assignment Goal
Perform a risk assessment for a business

Resources to use include…
• Annual & quarterly financial statements
• Company info (size, line of business, geographical locations, corporate philosophy, governance, etc)
• Industry info (regulatory environment, five forces analysis, major players, etc)
• Analyst/broker reports (investment analysis of company)
• Company & industry ratios
• Articles (trade, & newspapers)
Metro Inc.
- Major food and pharmaceutical retailer in Ontario and Quebec

How can we find company, industry, and financial information about Metro Inc?
Step 1: Locate Annual Reports

SEDAR
- All Canadian public companies & investment funds required to file documents with SEDAR

Company’s Website
- Look for sections like ‘Investor Relations’
Step 1: Locate Annual Reports

Lexis Securities Mosaic
- Full text searching
- SEDAR filings from Jan 1997-present
Step 1: Lexis Securities Mosaic

For advanced search, go to the SEDAR Filings page.
Step 1: Important Sections in Annual Reports

- Review of operations
- Messages from CEO, Board of Directors, etc.
- Management Discussion & Analysis Section
- Financial statements
- Info on accounting policies & statements from auditors

IFRS AND NON-IFRS MEASUREMENTS
We have included certain International Financial Reporting Standards (IFRS) and non-IFRS earnings measurements. These measurements are presented for information purposes only. They do not have a standardized meaning prescribed by IFRS and therefore may not be comparable to similar measurements presented by other public companies.

OPERATING INCOME BEFORE DEPRECIATION AND AMORTIZATION AND ASSOCIATE’S EARNINGS
Operating income before depreciation and amortization and associate’s earnings is a measurement of earnings before financial costs, taxes, depreciation and amortization (EBITDA), early redemption fees and associate’s earnings. It is an IFRS measurement and it is presented separately in the consolidated statements of income. We believe that this measurement helps readers of financial statements to better evaluate the Corporation’s operational cash-generating capacity.
Why use Library Resources?
• Financials in excel, performance indicators, competitors & more
• Information not from company’s point of view

Useful Library Databases Include

**Online**
Unique features
• Quarterly & annual financial statements in Excel for 15 yrs
• Company ratios

**Bloomberg**
Unique features
• Real-time financial tool
• Can only be used in Bronfman Library

**Hoovers**
Unique features
• Detailed overview of co. history, products, competitors & more
• Co. & ind. ratios

More Public Company Research Databases
Step 2: Using Mergent Online
Step 2: Using Bloomberg

Bloomberg Guide (includes detailed screenshots & instructions)
Step 2: Using Bloomberg

Screenshot of Financial Analysis homepage for Metro Inc.

Screenshot of Relative Value homepage for Metro Inc.

Bloomberg Guide (includes detailed screenshots & instructions)
Step 2: Using Hoovers

1. Browse Hoovers
2. Enter 'Metro Inc'
3. View company index
4. Analyze competitive landscape
Why locate industry information?
• Provides industry analysis, regulatory overview, operating conditions, ratios & much more

Useful Library Databases Include

**IBISWorld**
Unique features
• Strong coverage of niche industries
• Industry outlook, products, markets, industry performance, etc.

**MarketLine ADVANTAGE**
Unique features
• Covers variety of industries
• Includes market data, five forces analysis, etc.

**KEY BUSINESS RATIOS**
Unique features
• Covers variety of industries
• Includes industry ratios & company ratios

More databases available through Industry Research Guide
Step 3: Using IBISworld

1. IBISWorld

2. Start your search here:

3. Industry Reports (Canada)
   - Warehouse Clubs & Supercentres in Canada - 45291CA
   - Supermarkets & Grocery Stores in Canada - 44511CA
   - Frozen Food Wholesaling in Canada - 41319CA
   - Frozen Food Production in Canada - 31141CA
   - Bread Production in Canada - 31181CA

4. IBISWorld Industry Report 44511CA
   Supermarkets & Grocery Stores in Canada

May 2016 | Madeline Hurley
Step 3: MarketLine Advantage

1. MarketLine

2. Browse

3. Canada - Food Retail

4. Table Of Contents
   - Executive Summary
   - Market Overview
   - Market Data
   - Market Segmentation
   - Market Outlook
   - Five Forces Analysis
   - Leading Companies
   - Macroeconomic Indicators
   - Appendix
Step 3: Using Key Business Ratios

Check out Company section for company ratios!
Step 4: Locate Analyst Reports

Why locate analyst reports?
• Prepared by investment banks, consulting & research firms
• Provides investment analysis of public companies (ex: buy, hold, sell) & other company & industry information

Useful Library Databases Include

**Thomson One Investext**
- Unique features
  • Excellent analyst report coverage for Canadian public companies
  • Only works in IE

**LexisNexis® Academic**
- Unique features
  • Good analyst report coverage
  • Also includes news, company overview, and other info

More Analyst Report Sources Available Here
Step 4: Using Thomson One Investext
Step 4: Using LexisNexis Academic
Step 5: Finding Articles

Why locate articles?
• Find information on current issues in industry or current issues for company

**Canadian Grocer**

Industry Articles
• Cover current industry issues
• Written by practitioners

**The Economist**

Newspapers/Magazines
• Articles cover current issues
• Written for general public by journalists

Consult our Business Articles Guide for more help!
Step 5: Finding Articles

Useful Library Databases

- 5 business-related databases
- Includes industry, trade, popular articles, as well as scholarly articles
- Access to leading business journals like Harvard Business Review, as well as scholarly & trade
- Access to Canadian and international newspaper & magazine sources

Consult our Business Articles Guide for more help!
Step 5: Using ProQuest Business

1. ProQuest Business

2. Advanced Search

3. Combining Keywords Worksheet

Click me!
Step 5: Using Business Source Premier

1. Business Source Premier

2. Searching: Business Source Premier | Choose Databases
   - grocery retail" OR "food retail"
   - Canad*

3. Source Types
   - All Results
   - Industry Profiles (59)
   - Magazines (8)
   - Trade Publications (5)
   - SWOT Analyses (2)

Click me!
Step 5: Using Factiva

1. Select the search option
2. Enter the search terms: "grocery retail" or "food industry"

Combining Keywords Worksheet
Click me!
APA (American Psychological Association) is a type of citation style.

- Other common styles include MLA and Chicago.

Two important aspects of using APA:

1. Creating in-text citations
2. Creating more complete citations in the References list at end of assignment.
Use in-text citations when
• Paraphrasing
• Quoting directly from a source or using chart, table, graph, image, etc.

In-text citations require:
• The author’s last name
• Year of the publication
• Page number for quotations

(Exceptions for Internet sources and sources with no authors or no dates)
APA: References List

- New page, at the end of your assignment
- Provides readers with more complete references for the sources you cited using in-text references

References


doi: 10.1525/sp.2010.57.3.421


doi: 10.1007/BF02828501

Title: centred, no bold or underline

Organized alphabetically by author’s last name

Hanging Indent (.5 inch)

Double spaced
APA Resources

Citation Resources @ York
• Business Citation Guide (APA & MLA styles)
• SPARK’s APA guide

Additional Resources
• Purdue OWL’s APA style guide
Conclusion

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