S&P Capital IQ is a powerful database where you can get extensive company, macroeconomic and markets data and information including:
Financial/valuation data, equity data, transactions (including M&A and IPO’s), ownership data, news, events, filings, business relationships (e.g. customers & suppliers), relationship management, investment information, CapitalIQ estimates (projections), Peer Analysis, and more. The database enables the user to ‘screen’ for information to build datasets using numerous criteria.

This is a basic guide on how to use the ‘Screen’ for M&A transactions by industry and date range.

ACCESS TO CAPITAL IQ

To logon to Capital IQ, your professor must request a password and ID for you. Once you have received this you can log in to Capital IQ:
- Access Capital IQ via your MyMarshall Account
- Logon to your MyMarshall account [https://mymarshall.usc.edu](https://mymarshall.usc.edu)
- Under Marshall Explorer, select Academic, then CapitalIQ
- If you are unable to logon, please contact the Gaughan & Tiberti Library [https://libraries.usc.edu/locations/gaughan-tiberti-library/gaughan-tiberti-library-staff](https://libraries.usc.edu/locations/gaughan-tiberti-library/gaughan-tiberti-library-staff)

If you do not have an account, there are 3 Capital IQ terminals: 2 in the Gaughan & Tiberti Library and 1 in the JKP Lab (second floor). These are NOT the Bloomberg terminals. Login information is located on the terminal.

CAPITAL IQ – MERGERS & ACQUISITIONS

Mergers & Acquisition Transaction data can be found by Screening or by Company

**Using ‘Screening’** : To screen for a set of M&A deals with specific criteria, **Press the Screening Tab** at the top of the page. A drop down menu will appear, **select TRANSACTIONS** under Screening.
After pressing the ‘SCREENING’ tab, you will be led to the Transaction Screening page. This page provides numerous criteria for creating reports and spreadsheets. This screenshot shows only a partial list of the criteria available.

You can use any of the criteria to screen for M&A Transactions such as Industry (this example), by size of company (e.g. revenues) multiples, dates, geographies, company type (e.g. public, private, division, etc.). Each criteria has its own set of variables and a new menu will open and you will be able to select from these variables. You can screen on any number of criteria. After you select your criteria, it is very easy to edit your selections.

In this example, we will screen for transactions for the sub industry: ‘Semiconductor Manufacturing Machinery and Back-End Equipment’ then we will add a date range to refine the results.

To screen by Industry:
Select ‘Industry Classifications’ under the box called Company Details.

Select criteria for screening.

When you have made your selection, a screen will appear above providing additional options. In this case, you will select your industry from a list of Industry Classifications.
Once you press ‘Industry Classification’ a new screen will open above the screening criteria (see below). You now have the option to:

1. Browse industry categories by expanding the + in front of the boxes, OR
2. ‘Search Industries’ by entering the keyword: e.g. Semiconductors, then press SEARCH

- The ‘Semiconductor’ category will open up. Press the + sign next to the boxes to view Semiconductor sub-industries
- **Continue to press** + to expand on Semiconductors & Semiconductor Equipment (twice, using the + sign). Expand on (+) Semiconductor Equipment, then (+) Semiconductor Machinery Manufacturing Machinery
- **Check the boxes**: Semiconductor Manufacturing Machinery and Back-End Equipment
- After you have made your selections, **press Add Criteria** at the bottom right. (not shown on the screen).

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**Select the industry segments to include in your search.**

**Press ‘Add Criteria’ button (far right, not shown here)**
After you press **Add Criteria** button, you should see all the deals for ‘Semiconductor Manufacturing Machinery OR Back End Equipment,’ as checked in the previous screen shot. **This shows 1,644 results** (or so). This is probably too many deals, so we will select additional criteria and search by a date range.

**Note:** Results may vary slightly as the database updates transactions.

Once again, you will see the list of criteria, and you can now add additional criteria; each set of criteria will have its own set of options.

1. Under the **M&A Details** box select **Dates**. Be sure to select the ‘Dates’ under M&A, so you will get M&A deals only.
2. The options for DATES will open, select ‘Announced Date’ (or other option)
3. Enter Date or Date Range under **Time Frame**
4. Press **Add Criteria** button at the bottom right side of the page (not shown).
After adding the date range of the last 3 years, the number of transactions have gone from 1,644 to 85 transactions. Press View Results to review the list of deals.

Review your Results: The list may have deals that you want to remove, for example you may only want deals that have closed: you can remove all deals that have not closed by adding additional criteria, e.g. Deal Status -Closed deals, or simply sort it out in Excel. You can Add/Edit Criteria or Return to Screen builder to edit your criteria (see below).

Spreadsheets, Templates & Editing Display Columns: Capital IQ has templates you can use such as a ‘Merger & Acquisition Details’ templates which includes data items useful for evaluating M&A transactions. You can select a template, add columns to a template or create your own. See all of these options below:

Select Excel, then press the GO button to download the spreadsheet.

Note: USC does not have the Excel Plug-in.
**Finding M&A Transactions by Company:** Mergers & Acquisitions can also be found by company; for example, if you know of a deal that meets your requirements, you can search for that company and find a deal. You can then use this deal to screen for similar deals by selecting ‘find similar deals.’

Go to the home page; enter the name of the company in the search box.
- A list of company names will appear. (1st screen shot below)
- Select the company by pressing the name of the company you are looking for. (2nd screen shot below).
The M&A/Private Placements screen lists all the transactions for Medtronic that involve Private Placements and M&A activity. You can get the transactions details on deal by pressing the DATE (e.g. Jul-07-2011 in the example below)

*Note: You can sort the deals by pressing the ‘Transaction Type’ column heading*
The details of the deal are revealed after you press the **Date**. You can explore the tabs and data provided. (Deal Overview, Consideration Details and/or Deal Timeline)

To get a list of similar deals, press **Find Similar Transactions**.

Once you press ‘**Find Similar Transactions**’ you will be taken to the **Transaction Screening** page. In this example you will see Criteria 1-7 have already been populated based on the Salient Surgical Technologies – Medtronic deal in our example.

At this point you could review the result and download the spreadsheet to Excel, or you can **EDIT** any of the criteria to suit your needs.

Press **View Results**, adjust column headings if necessary (e.g. M&A template, etc.) and download to Excel.