Capital IQ

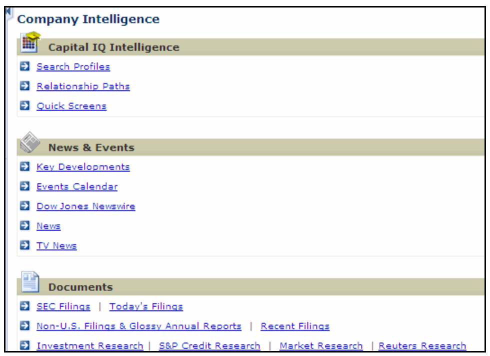
A Division of Standard & Poor's

COMPANY INTELLIGENCE

Introduction

Click on the **COMPANY INTELLIGENCE** tab to access the following data:

- Search Profiles
- Relationship Paths
- Quick Screens
- Key Developments
- Events Calendar
- Dow Jones News
- TV News
- SEC Filings/Today's Filings
- Non-U.S. Filings/ Glossy Annual Reports
- Comtex News
- Research Report



Search Profiles

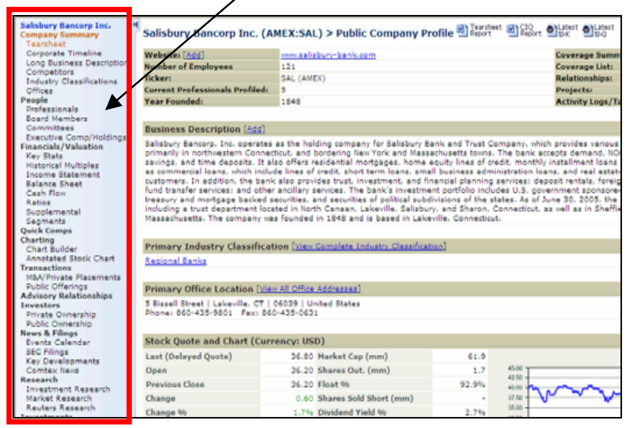
Best Practices

- **Research Public Companies, Investment Firms, Private Companies, or People**
- **Download detailed company reports**

Use the **SEARCH** box at the top left corner of your screen to access all available Capital IQ information on a specific company or person. Simply type in the full or partial name of any company or person (for people, enter "last name, first name" or initial), or public company ticker symbol (type "t=xxxx") to pull up a summary tearsheet.

Capital IQ Profile Data

Capital IQ contains a wealth of information on public and private companies, operating subsidiaries, investment firms, and their respective portfolio companies. Use the left–hand links to navigate through details.



Public and Private Co.

- Auditable Financials
- Quick Comps
- Historical Multiples
- Estimates
- Competitors
- Business Description
- Industry Classification
- Professionals
- Board Members
- Corporate Timeline
- Committees
- Charting
- Transactions
- Fixed Income
- Advisory Relationships
- Public/Private Ownership
- Key Developments
- Dow Jones News
- TV News
- Direct Investments
- Business Relationships
- Exec Comp/Holdings
- SEC Filings

Investment Firms

- Investment Criteria
- Fund Families
- Professionals
- Board Members
- Direct Investments/Subs
- Co-Investors
- Investments by Industry/Date
- Transactions
- Business Relationships
- Advisory Relationships
- LP Investments
- LP Co-investors
- Key Developments
- TV News
- Offices
- Website
- SEC Filings

Company Profile Left links

Financials/Valuations – Access key statistics, capitalization table, historical multiples, ratios, supplemental data, segment data, and detailed financial statements. Our financial numbers are auditable; you can view calculations, and underlying filings.

Quick Comps – View a financial spread of comparable companies including financial data, trading multiples, and operating statistics; all of which can be exported to Excel.

Transactions – Displays all M&A/Private Placements and Public Offerings transactions. Click the announced date to the left of any individual transaction to view additional details.

Professionals/Board Members – Lists all current executives and board members. Click on the ⊕ in front any professional's name to expand his/her detailed individual profile.

Direct Investments/Subs - Profiles current and prior portfolio companies. Click on the ⊕ next to each portfolio company name to view that company's profile. Click on the ⊕ next to the **Customize View** located toward the top of the screen to sort all companies by various criteria.

Generating Company Reports

1. While viewing a company profile, click the **Generate Reports** link at the bottom of the left-hand navigation links.
2. Choose the **Basic Reports** (predefined) or **Custom Reports** (build your own) tab.

   Within the CUSTOM REPORTS tab you can:

   - Choose an existing template from the Saved Templates section.
   - Choose desired information by moving available items into the right-hand column.
   - Save your selections as a new template by typing a name into the NEW TEMPLATE NAME box, selecting an Access Level, and then clicking the **Save Template** button.

3. Click the **Generate Report** button.

ANY QUESTIONS? CONTACT CLIENT SUPPORT AT 1-888-806-5541.

Filings/ SEC Documents

Best Practices

- **View and download Edgar Online SEC filings in neatly downloadable formats**
- **View and download Non-U.S. filings/Glossy Annual Reports**

Filings are accessible in four ways:

1. While looking at the profile of a U.S. public company, click the **SEC Filings** link in the left-hand column. Click on the **Form Type** link to see the document in HTML format, or click on the *Word/Excel* icons to download the well-formatted filings.
2. Click the **SEC Filings** link in the **Company Intelligence** tab. You can search all filings by company name, ticker symbol, keyword, or a person's name. Filter based on filing type and/or date range. Click on the **Form Type** link to see the document in HTML format or the *Word/Excel* icons to download.
3. Non-U.S. Filings/Glossy Annual Reports are accessible by either clicking the **Non-U.S. Filings/Glossy Annual Reports** link in the **Company Intelligence** tab or when looking at a profile of a Non-U.S. company, click the **Non-U.S. Filing** link in the left-hand column.
4. Create an alert for SEC documents for email notification of filings. In My Capital IQ select **My Alerts/Create New Alert**; select SEC documents and choose a list or enter tickers.

Dow Jones News

As a premium service, Capital IQ provides comprehensive and up-to-the-minute coverage of issues affecting companies, investments, and markets through Dow Jones Newswire™. You will have the ability to conduct detailed searches by keywords, company, names, tickers, and Dow Jones codes and export all articles to word. Please contact your Account Manager if you do not currently have this feature and would like it.

Search for an Article

1. Type in the ticker, Dow Jones Code, keyword, and/or date range.

   Note: *Each criteria type is added as an* ***AND*** *to your search.*
2. Click **Go**.

Email an Article

1. Click the envelope icon at the top of the page.
2. Enter the email address of the recipient and a brief message explaining why you sent them the article (optional).

TV News

TV News, compiled by Critical Mention™, allows you to view video clips from the last 30 days from various TV sources. News clips can be sorted by keywords and date range. Click on the image to listen to the news.

Note*: TV news uses Windows Media Player 9.x or higher.*

Research Reports

Brokerage and Industry Research reports are accessible in two ways:

1. Click the **Research Reports** link in the **Company Intelligence** tab. Select either the Brokerage or Market Research tab, specify your desired criteria, and then click the **Search** button.
2. When viewing a company profile, click the **Research Reports** link in the bottom left-hand side tool bar.

Note*: availability and cost of these reports may vary. Please contact your Account Manager for more detail.*

Key Developments

Best Practices

- **Idea generation and project leads**
- **Quick industry activity snapshot**

Key Developments highlight corporate announcements that could signal possible investment opportunities. Click on **Company Intelligence - Key Developments** to select a specific event. To generate a report, click either the Word or Excel icon.

To setup alerts for Key Developments, go to **My Capital IQ - My Alerts**. Click the **Create Alert** link and enter a name for your alert. Check the Key Developments' box in the subscribe column and click on **Save and Edit Companies**. You can add individual companies by ticker, Coverage List, Watch List or by using the **Search Companies** link. Complete the Alert by clicking **Save**.

Relationship Tools

When viewing a person profile, click into left-hand links for Relationship Tree™ and Relationship Paths™.

Relationship Tree™ quickly identifies all possible relationships for any one professional in our database.

Relationship Paths™ leverages Capital IQ's data on board memberships, current and prior employment, and personal relationships to display "degrees of separation" between two professionals or companies, or from your firm to another company or person.

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