Library Resources & Services for MSc Finance students

Moninder Lalli: moninder_lalli@sfu.ca
Agenda

Details

Potential

Tips
Belzberg Library

Print Collection and Intercampus Delivery
Belzberg Library

Collaborative and Silent Study Spaces
Why use the library?

- Price
- Print Only (?!?)
- Findability
That one article...

My instructor told me to read *The Neighborhood Effect of Real Estate Maintenance* in the “*Journal of Real Estate Finance & Economics*.”

What’s my best bet?
Articles on the topic…

I need articles on asset allocation in hedge funds.

What’s my best bet?
Finding databases

Article databases

Financial Data
Top Resources

**MINT Global/ORBIS**
Information on over 64,000 publicly-traded companies and 148 million private companies from around the world. Available via basic (MINT Global), advanced (ORBIS), and data retrieval (WRDS) interfaces.

**ThomsonOne.com Investment Banking**
Detailed profiles of companies, equity data and international filings.

**Bloomberg**
Real-time and historical information on bonds, equities, commodities, currencies and funds in international markets.
Access: Available at the standalone computer 1 on the third floor of the Bennett library.
**Reserve/book time:** You can book or reserve time on the computer in the Bennett library on Burnaby Mountain which runs this resource by clicking here.

**WRDS - Wharton Research Data Services**
Platform for a variety of datasets in the fields of finance, accounting, banking and economics.

Other Resources

**CFMRC TSX Database**
The Canadian Financial Markets Research Centre (CFMRC) Summary Information Database. Daily and monthly Toronto Stock Exchange trading information.

**Compustat North America & Global**
Detailed financial and market data covering publicly traded companies from around the world.

**CRSP**
Provides access to NYSE/AMEX/Nasdaq Daily and Monthly Security Prices and other historical data related to over 20,000 companies.

**EBS FX data**
Provides historical insight into trading activity.
Access: Available at the standalone computer on the third floor of the Bennett library.
**Reserve/book time:** You can book or reserve time on the computer in the Bennett library on Burnaby Mountain which runs this resource by clicking here.
ThomsonONE – Investment Banking

ThomsonOne.com Investment Banking

Online access: Connect

Full description:
Detailed profiles of 70,000 companies, including downloadable equity data; streaming Reuters news on markets, industries, and companies; summary data for 60,000 companies; and profiles of officers and directors.

This database also contains downloadable time series data on commodities, equity prices, index values, exchange rates, interest rates, and more via Da Charting to access this data. Note that you need to copy-and-paste to export the Datastream data.

In addition to the core content of ThomsonONE - Investment Banking, SFU has subscribed to the following modules:

- **Deals**
  - Full history and advanced functionality of all M&A including Deals Multiples, Equity new issues, Bonds new issues and Loans. See Deals for more details.
- **Financials**
  - Full history (1980+) of Worldscope "standardised" financials (about 1600 data items for over 50,000 companies) and Reuters "As reported" financials.
- **Credit Analysis**
  - Underlying debt and maturity profiles for issuers as well as Ratings and Credit Default Swaps. See Credit Analysis for more details.

**NOTES:**
1. This database only works with Internet Explorer.
2. SFU has a 5-user license for this database. Please remember to logout (top right corner of the database) when you are finished.

**Resource type:** Datasets
**Content types:** Numeric data, Statistics
**Simultaneous users:** 5
**Help:** Available within the database.
ThomsonONE – Investment Banking

ASK ME ABOUT

Company fundamentals (standardized and self-reported)
ASK ME ABOUT

M&A data,
new equity issues

ThomsonONE – Investment Banking
ASK ME ABOUT

Bond data (corporate, sovereign, municipal), bond credit ratings
**Company Overview**

**Ballard Power Systems Inc.** (Toronto Stock Exchange: BLD)

### Public Profile

- **Address:** 9000 Glenlyon Parkway, BURNABY, BRITISH COLUMBIA V5J 5J8, CANADA
- **Phone:** +1 604 454-0900
- **Website:** [http://www.ballard.com](http://www.ballard.com)

### Financial Summary

<table>
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<tr>
<th></th>
<th>Last Twelve Months as of 06/30/14</th>
<th>12/31/13 (A)</th>
<th>12/31/14 (E)</th>
<th>12/31/15 (E)</th>
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<td><strong>Sales (MM)</strong></td>
<td>66</td>
<td>61</td>
<td>80</td>
<td>105</td>
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<td><strong>Growth</strong></td>
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<td>45.3</td>
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<td><strong>Gross Profit (MM)</strong></td>
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<td>13</td>
<td>23</td>
<td>24</td>
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<td>Rank</td>
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<td>Acquirer Name</td>
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<tr>
<td>1</td>
<td>11/12/07</td>
<td>Cognos Inc</td>
<td>IBM Corp</td>
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<td>2</td>
<td>11/16/06</td>
<td>Guangdong Development Bank</td>
<td>Investor Group</td>
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<td>3</td>
<td>01/23/14</td>
<td>IBM-X86 Server hardware Bus</td>
<td>Lenovo Group Ltd</td>
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<td>4</td>
<td>06/04/13</td>
<td>SoftLayer Technologies Inc</td>
<td>IBM Corp</td>
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<td>5</td>
<td>09/20/10</td>
<td>Netezza Corp</td>
<td>Onyx Acquisition Corp</td>
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<td>6</td>
<td>12/07/04</td>
<td>IBM Corp-Personal Computing</td>
<td>Lenovo Group Ltd</td>
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<td>05/24/10</td>
<td>Sterling Commerce Inc</td>
<td>IBM Corp</td>
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<td>8</td>
<td>08/27/12</td>
<td>Kenexa Corp</td>
<td>IBM Corp</td>
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ThomsonONE – Credit Analysis

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<th>Agency (Scope)</th>
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<td>2012/05/30</td>
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<tr>
<td>S&amp;P’s Short-term Issuer Credit Rating (Domestic)</td>
<td>A-1+</td>
<td>2012/05/30</td>
</tr>
<tr>
<td>S&amp;P’s Senior Unsecured (Foreign)</td>
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<td>2012/05/30</td>
</tr>
<tr>
<td>S&amp;P’s Long-term Issuer Rating (Foreign)</td>
<td>AA-</td>
<td>2012/05/30</td>
</tr>
<tr>
<td>S&amp;P’s Long-term Issuer Rating (Domestic)</td>
<td>AA-</td>
<td>2012/05/30</td>
</tr>
<tr>
<td>S&amp;P’s Commercial Paper (Foreign)</td>
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<td>2012/05/30</td>
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<tr>
<td>Moody’s Senior Unsecured (Foreign)</td>
<td>A1</td>
<td>2011/05/12</td>
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<tr>
<td>Moody’s Senior Unsecured (Domestic)</td>
<td>Aa3</td>
<td>2010/11/23</td>
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<tr>
<td>Moody’s Most Recent Short-term Rating (Foreign)</td>
<td>P-1</td>
<td>2009/01/07</td>
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<tr>
<td>Moody’s Most Recent Short-term Rating (Domestic)</td>
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<td>2009/01/07</td>
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<td>Moody’s Long-term Issuer Rating (Foreign)</td>
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<td>2010/11/23</td>
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<td>Moody’s Long-term Issuer Rating (Domestic)</td>
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<td>2010/11/23</td>
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<td>Moody’s Estimated Senior Rating (Foreign)</td>
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<td>Moody’s Derived Long-term Issuer Rating (Foreign)</td>
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<td>2010/11/23</td>
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<td>Moody’s Derived Long-term Issuer Rating (Domestic)</td>
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<td>2010/11/23</td>
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<tr>
<td>Moody’s Commercial Paper (Foreign)</td>
<td>P-1</td>
<td>2009/01/07</td>
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</table>
Mint/ORBIS

ASK ME ABOUT

Private companies
International companies
Corporate ownership data (listed shareholders, % owned, etc.)
Mint/ORBIS

ASK ME ABOUT

Generating a list of companies based on very precise criteria
# ALTERRA POWER CORP.

BvD ID number: CA34764NC

## Key financials & employees

### Consolidated data (th USD) Modify

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<tr>
<th></th>
<th>31/12/2013 12 months IFRS AR</th>
<th>31/12/2012 12 months IFRS AR</th>
<th>31/12/2011 6 months IFRS AR</th>
<th>30/06/2011 12 months IFRS AR</th>
<th>30/06/2010 12 months Local GAAP AR</th>
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<tr>
<td>Operating revenue (Turnover)</td>
<td>86,917</td>
<td>61,112</td>
<td>37,055</td>
<td>87,588</td>
<td>5,120</td>
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<tr>
<td>P/L before tax</td>
<td>-119,787</td>
<td>-19,902</td>
<td>-22,564</td>
<td>-7,718</td>
<td>-16,446</td>
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<tr>
<td>P/L for period [=Net income]</td>
<td>-110,831</td>
<td>-19,849</td>
<td>-13,813</td>
<td>-11,491</td>
<td>-16,446</td>
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<tr>
<td>Cash flow</td>
<td>-96,355</td>
<td>-6,024</td>
<td>-5,826</td>
<td>2</td>
<td>-15,166</td>
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<tr>
<td>Total assets</td>
<td>633,608</td>
<td>712,530</td>
<td>701,224</td>
<td>819,713</td>
<td>109,703</td>
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<tr>
<td>Shareholders funds</td>
<td>279,857</td>
<td>364,047</td>
<td>307,219</td>
<td>350,612</td>
<td>142,070</td>
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<tr>
<td>Current ratio (x)</td>
<td>1.49</td>
<td>1.76</td>
<td>1.12</td>
<td>1.78</td>
<td>5.18</td>
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<td>Profit margin (%)</td>
<td>n.s.</td>
<td>-32.57</td>
<td>-60.89</td>
<td>-8.81</td>
<td>n.s.</td>
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<tr>
<td>ROE using P/L before tax (%)</td>
<td>-42.80</td>
<td>-5.47</td>
<td>-14.69</td>
<td>-2.20</td>
<td>-11.58</td>
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<td>ROCE using P/L before tax (%)</td>
<td>-18.66</td>
<td>-1.50</td>
<td>-5.21</td>
<td>0.78</td>
<td>-8.20</td>
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<td>Solvency ratio (asset based) (%)</td>
<td>44.17</td>
<td>51.09</td>
<td>43.81</td>
<td>42.77</td>
<td>71.50</td>
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<tr>
<td>Price earning ratio (x)</td>
<td>n.s.</td>
<td>n.s.</td>
<td>n.s.</td>
<td>n.s.</td>
<td>n.s.</td>
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</table>

### Graphs - Key data items

![Graph 1](image1.png)
![Graph 2](image2.png)
Global Ultimate Owner (GUO) ALTERRA POWER CORP. (CA)

The companies underlined and displayed in bold black are available on Mint Global (Very Large, Large and Medium sized companies).

<table>
<thead>
<tr>
<th>Subsidiary name</th>
<th>Country</th>
<th>Direct (%)</th>
<th>Total (%)</th>
<th>Source</th>
<th>Date of inform.</th>
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<tr>
<td>MAGMA ENERGIA GEOTERMICA PERU S.A.</td>
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<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
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<tr>
<td>MAGMA ENERGY (U.S) CORP</td>
<td>US</td>
<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
</tr>
<tr>
<td>SODA LAKE HOLDINGS I LLC</td>
<td>US</td>
<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
</tr>
<tr>
<td>SODA LAKE HOLDINGS II LLC</td>
<td>US</td>
<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
</tr>
<tr>
<td>AMOR IX LLC</td>
<td>US</td>
<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
</tr>
<tr>
<td>SODA LAKE LIMITED PARTNERSHIP</td>
<td>US</td>
<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
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<tr>
<td>SODA LAKE RESOURCES PARTNERSHIP</td>
<td>US</td>
<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
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<td>SODA LAKE RESOURCES PARTNERSHIP</td>
<td>US</td>
<td>100.00</td>
<td>100.00</td>
<td>WW</td>
<td>12/2012</td>
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<tr>
<td>MAGMA ENERGY ICALAND EHF</td>
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<td>MAGMA ENERGY ITALIA S.R.L</td>
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<td>MAGMA ENERGY SWEDEN AB</td>
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<tr>
<td>HS ORKA HF</td>
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<tr>
<td>HS ORKURANNSÓKNIR EHF</td>
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<tr>
<td>MCCAULEY ISLAND WIND HOLDINGS INC</td>
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<td>SALAL GEOTHERMAL INC</td>
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<td>SOREN HILL WIND HOLDINGS INC</td>
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<tr>
<td>SOUTH BANKS ISLAND WIND HOLDINGS INC</td>
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<tr>
<td>PLUTONIC POWER CORPORATION</td>
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</table>
FP Infomart

ASK ME ABOUT

Canadian company information
Financial Post Corporate Analyzer

Ballard Power Systems Inc.

Updated as of: Sept. 4/15

Listing: TSX/BLD; NASDAQ/BLDP

Head Office: 9000 Glenlyon Pky, Burnaby, BC, V5J 5J8
Tel: (604) 454-0800 Fax: (604) 412-4700
Email: guy.mcaree@ballard.com Website: www.ballard.com
Investor Relations: Guy McAree Toll-free: (800) 564-6253
Key Executive Officer: R. Randall MacEwen, pres., CEO and dir.
Key Financial Officer: Anthony R. Guglielmim, v-p and CFO

Share Price Statistics

<table>
<thead>
<tr>
<th>Share Prices &amp; Volumes</th>
</tr>
</thead>
<tbody>
<tr>
<td>52 Week High</td>
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<tr>
<td>$3.96 on</td>
</tr>
</tbody>
</table>

Sept. 8/14 | Aug. 24/15 | Sept. 4/15 | Sept. 4/15 |

Share Price Ratios
Stock analyst reports


**Tesco**

**S&P Capital IQ Recommendation**  HOLD

**S&P Capital IQ Equity Analyst**  Carl Short

**GICS Sector**  Consumer Staples

**Sub-Industry**  Food Retail

Summary: Food and general merchandise retailer Tesco operates stores in the UK, the Republic of Ireland and parts of Central Europe and Asia.

**Key Stock Statistics** (Source: S&P Capital IQ, company reports)

- **52 Wk Range**: GBP 1.65 - 2.51
- **Trailing 12-Month EPS**: GBP -0.70
- **Trailing 12-Month P/E (x)**: 21.3
- **P/E on S&P EPS 2016E**: Common Shares Outstg. (M) 8,077.43
- **Market Capitalisation (M)**: GBP 15,456.2

**Price Performance**

- **50-Week Mov. Avg.**
- **12-Mo. Target Price**
- **Volume Above Avg.**
- **10-Week Mov. Avg.**

**Price Performance Chart**

**Qualitative Risk Assessment**

<table>
<thead>
<tr>
<th>LOW</th>
<th>MEDIUM</th>
<th>HIGH</th>
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</thead>
</table>

Our risk assessment reflects Tesco’s size and its significant share (circa 29%) of the UK grocery market, solid cash-flow and a property-backed balance sheet. However, we see medium term risks from increased competition from the discounters and Tesco’s new management’s strategy is, as yet, unproven.

**Quantitative Evaluations**

- **S&P Capital IQ Quality Ranking**: A+

**Past performance is not an indication of future performance and should not be relied upon as such.**

**Analysis prepared by Equity Analyst Carl Short on 29-Jun-2015.**

**Highlights**

- During FY15 (Feb, y/e), Tesco issued four profit warnings (and a dividend cut) as its UK grocery

**Investment Rationale/Risk**

- Our recommendation is HOLD. In our view, it is a potential recovery situation with many challenges.

**STANDARD & POOR'S**

**Net Advantage**
Private research firm reports
Academic standards

Writing

Citing

What needs to be cited?

Another’s words?

yes

Quote & Cite it

no

Another’s ideas?

yes

Cite it

no

Do not cite it
Air Canada faces class-action over ticket glitch
A mistake by Air Canada in offering a package of flights at just 10 per cent of the value has triggered a proposed class-action lawsuit by customers who thought they got an amazing deal. Court documents, filed in both Quebec and British Columbia, stated that the flight pass was offered between Aug. 25 and Aug. 28 at just under $500, but customers were told days later the cost of 10 one-way business-class flights in the western United States or Canada was actually $6,000. The documents say Air Canada refused to live up to its contractual obligations and illegally removed the flight passes. Garret Munroe, a lawyer with Munroe & Co. the B.C. firm behind the legal action, said the lawsuit could involve thousands of people, but only Air Canada knows exactly how many people purchased the deal. “Our view here is that Air Canada has made an enforceable contract, it delivered the flight packages to consumers and it has improperly taken them away,” he said in an interview. “Air Canada is a duty bound and... TERRY DOHERTY
• Airline price error launches... | Medicine Hot News
• All 20 related articles...

Fear scaring investors' stocks off
A stock market correction was widely anticipated and, in some cases, even wanted, but fear is still dominating investor sentiment and causing wild swings in stock prices. Stocks stabilized Wednesday — the S&P 500 rose 1.13 per cent to 1,935.42 — but the equity market has seen a sharp and... Q&A: What are... | The Mercury (Potstown, PA)
• All 24 related articles...

U.S. private payrolls rise steadily
U.S. private employers maintained a solid pace of hiring in August despite recent global financial-market turmoil, suggesting that labour-market momentum likely remains strong enough for the Federal Reserve to consider an interest rate hike this year. The ADP National Employment... The Globe and Mail (BC Edition) | Canada | Thu, 3 Sep 2015
• All 29 related articles...
Eek! Stop now!

My brain is full.

Where can I find you if I need help later with all this stuff?
Contact the library

“Ask a Librarian” link

Chat, Phone, Email, Text, In-person...

Ways to reach us

- AskAway: Chat online with our research experts and find answers to your questions.
- Txt Us: Text us: Quick answers to short questions. 604.724.5898
- Ask Us by Email: Most answers in one business day or less.
- Ask Us by Phone [hours]:
  - W.A.C. Bennett Library (SFU Burnaby) 778.782.4345
  - Beedie Library (SFU Vancouver) 778.782.5051
  - Fraser Library (SFU Surrey) 778.782.7414
- Ask Us in Person: Research help desks are available at all three SFU libraries [hours].

In-depth research guidance

- Librarians: Specialists in the information sources and approaches used by specific university departments.
- Instruction on Request: Set up your own library orientation by gathering two or more of your classmates for Instruction On Request.
Questions?

Megan Sorenson: msorenso@sfu.ca
Questions?

Moninder Lalli:
moninder_lalli@sfu.ca

Good luck!