**MGT499**

**Self-directed Exercises for Researching a Public Company**

The company are you going to research is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

1. Try to do a Google search with [company] **investor relations**.

* Locate the company's investor relations webpage
* Find their SEC Filing **10-K** (annual report)
* Download the most recent 10-K Report

*\* if it is hard to locate the 10-K Form the investor’s relation’s page, Google Search [company] 10-K directly.*

2. Access Mergent Online

* Search the [company name] or [Ticker Symbol], then find **Company Reports** Tab, download an **Expanded Fundamental Report**
* Compare with Competitors and Calculate Financial Ratios and Industry Average:
  + Select the **Competitors** Tab,
  + Click **Add All to Company Analysis List**;
  + On the top of the screen change my **Mergent Tools** to **Company Comparison Report**,
  + Select the Companies and Data Items/Ratios for the comparison,
  + Check the Box **Include Average**;
  + Scroll down and **Select a Format**.
  + Click **Download the Report**.

3. Access Business Source Complete

**A. Find SWOT Analysis**

* Search the [company's name], then
* Limit to **full-text**,
* Change the **time periods** to recent 2-3 years,
* Change **Source Types** to **SWOT analysis** and download the Company SWOT analysis.

**B. Find Industry Profiles**

* Change the Source Type to **Industry Profiles**,
* Select **Publisher - MarketLine** (Industry Profiles with Porter's Five Forces Analysis); If available, Select **Publisher** - **Business Monitor International (BMI)** (Industry SWOT Analysis & Forecast); if needed, use **Geography** to limit to the United States.
* Download one of the most relevant **Industry Profiles**.
* Create the **citation** for the report using the **Cite Tool.**

**B. Find A Journal/Trade Publication/Magazine Article**

* Limit the **Source Type** to **Academic Journals** or **Trade Publication** or **Magazine**, then
* Find a relevant article for the company,
* Download the article.
* Create a **Citation** for the article using the **Cite Tool.**
* Select Multiple Articles on the search result list and put them into a **Folder**. Click **Folder** on the banner area of the screen and **check the box** to select all articles in the folder, Click **Save as File** on the right of the screen and save.

4. Access U.S. Major Dailies

* + Search the [company’s name] and add **another keyword** for the topic you are interested in such as strategy, plan, culture, challenges, etc. For example, Nike strategy (If the results are less relevant, try to **Modify Search** and use **Advanced** search to limit the keywords in **NOFT** (Anywhere except for Full Text).
  + Change **Publication Date** to recent years,
  + Find a newspaper article for the company on the topic, then
  + Save the PDF of the Newspaper Article.
  + Create the **citation** for the article using **Cite tool**.

5. Search First Research Industry Profile (public website) with the company’s name and find the NAICS code for the proper industry report

*\* other ways to try: search a larger competitor’s name, search the industry, or browse the industry categories.*

**Access Mergent Archive**

* Follow **D&B Manuals**--> **First Research**,
* Copy/paste the **NAICS code** from the public website,
* Scroll to the **right** and see the **PDF document**,
* Download the First Research Industry Profile report.

If you have any questions, contact Grace Liu, Associate Professor, Business Librarian at [yliu@wcupa.edu](mailto:yliu@wcupa.edu)

Find the library guide at: https://library.wcupa.edu/mgt499