S&P Global
Market Intelligence

S&P Global Market Intelligence for Salesforce

User Guide

Version 6.0 for Lightning

June 2026

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Key Features

New in Version 6.0

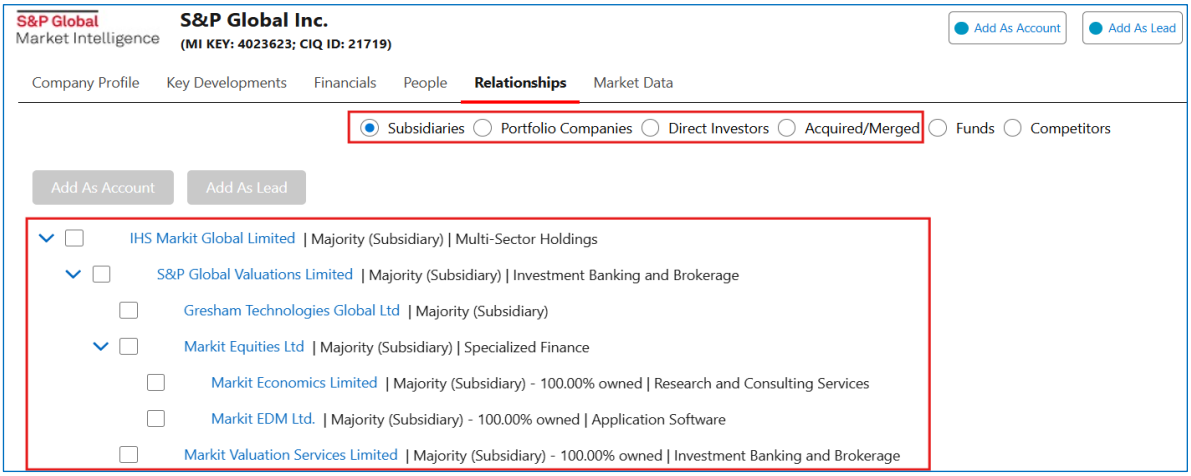
Topic Tags (See Appendix for more details)

1. Topic Tags and themes are now available for ~2.13mn companies.
2. Introduced the ability to screen Companies, People and Key Developments on Topic Tag themes.
3. Topic tags are added as SPCIQ Custom Fields.

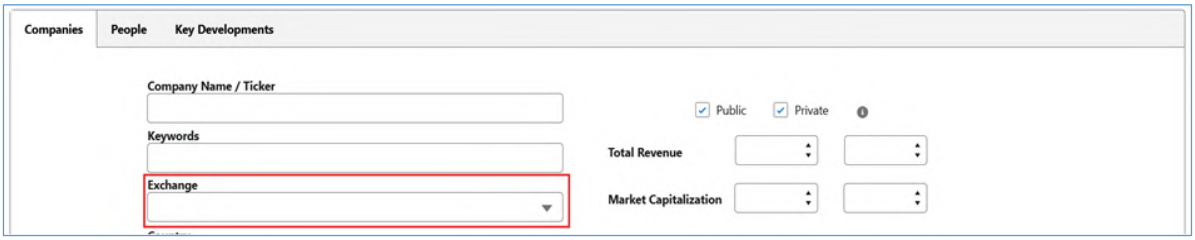
Company Name	Headquarters	Topic Tag Theme	Number of Employees	Total Revenue (USD Millions)	Market Capitalization (USD Millions)
Amazon.com, Inc.	United States, Washington, S...	Artificial Intelligence, Cloud S...	1,576,000	$716,924	$2,885,702
Alphabet Inc.	United States, California, Mou...	Artificial Intelligence, Cloud S...	190,820	$402,836	$4,659,458
CVS Health Corporation	United States, Rhode Island, ...	Artificial Intelligence, Digital ...	259,500	$399,834	$105,207
Microsoft Corporation	United States, Washington, R...	Artificial Intelligence, Cloud S...	228,000	$281,724	$3,078,640
NVIDIA Corporation	United States, California, Sant...	Artificial Intelligence, Cloud S...	42,000	$215,938	$4,821,541

Relationships

1. Expanded the depth and breadth of company relationship coverage by ~3mn.
2. Reformulated the relationships tab to make it more up to date:
   a. Instead of 'Direct Subsidiaries', we now have 'Subsidiaries' with both direct & indirect relationships, now visible in a tree format for easier analysis & interpretation.
   b. Introduced portfolio companies to view a company's investments.
   c. Acquired & Merged entities can now be viewed separately.
   d. Ability to view percentage of ownership and stake type.



Added ability to screen by Exchange



Locate Prospects

S&P Global Market Intelligence for Salesforce has a robust search tool with dozens of criteria you can use to locate prospects. You can search for companies, people, and events that meet your requirements.

Companies - S&P Global Market Intelligence for Salesforce has expanded its private company coverage to allow users to have access to 20 million public and private companies globally, as well as 8.5 million private & public funds. Profiles can include company/fund profile information, key financials, news, and events. With company data, you can:

- research new industries and markets,
- view a corporate family tree, determine the ultimate parent of a company, identify private equity sponsors, and find current investors in a company.

People - S&P Global Market Intelligence for Salesforce profiles over 15.5 million company executives, board directors and private investment professionals. With people data, you can:

- identify executives and board members affiliated with a specific company,
- pinpoint key decision makers who may be interested in your product or service.

Key Developments – S&P Global Market Intelligence for Salesforce provides a news analysis, and filtering service delivering categorized news and corporate event data. With key developments data, you can:

- quickly catch up on recent news affecting your prospects,
- identify new business opportunities based on particular events (e.g., business expansions and executive changes).

**Requires S&P Capital IQ Pro subscription.*

Stay Current on Prospects and Clients

With S&P Global Market Intelligence for Salesforce, you can stay current on your prospects and clients. Through a single interface, you can quickly and easily:

- View company/fund profile information and generate a tear sheet.
- Review all news and significant events impacting a company or a fund.
- Retrieve relevant financials.
- Identify company relationships including subsidiaries, direct investments, and competitors.
- Perform customized in-depth searches on specific topics of interest.
- Stay informed of competitors and peer activity.
- View critical market data items.

Add New Information to your Salesforce Contact Database

S&P Global Market Intelligence for Salesforce allows you to add new information to your contact database. You can:

- Add new accounts, leads and contacts using S&P Global Market Intelligence for Salesforce data.
- Enrich an existing account or lead or contact with additional details from S&P Global Market Intelligence for Salesforce.
- Automatically create accounts by uploading a list of S&P Capital IQ Company IDs.

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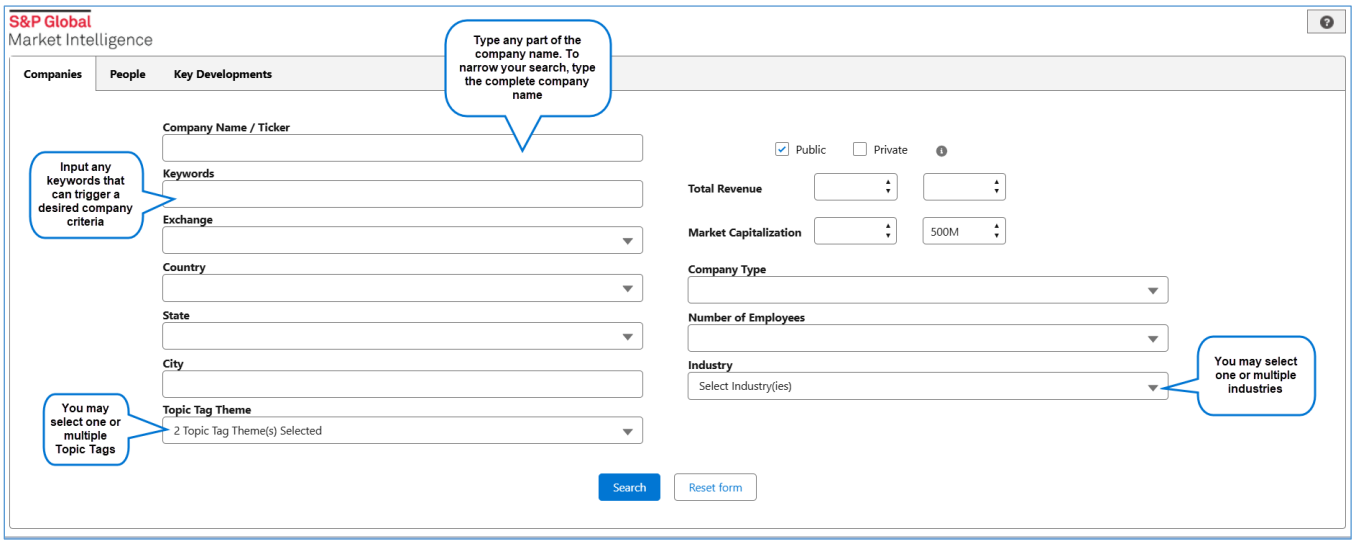
Search

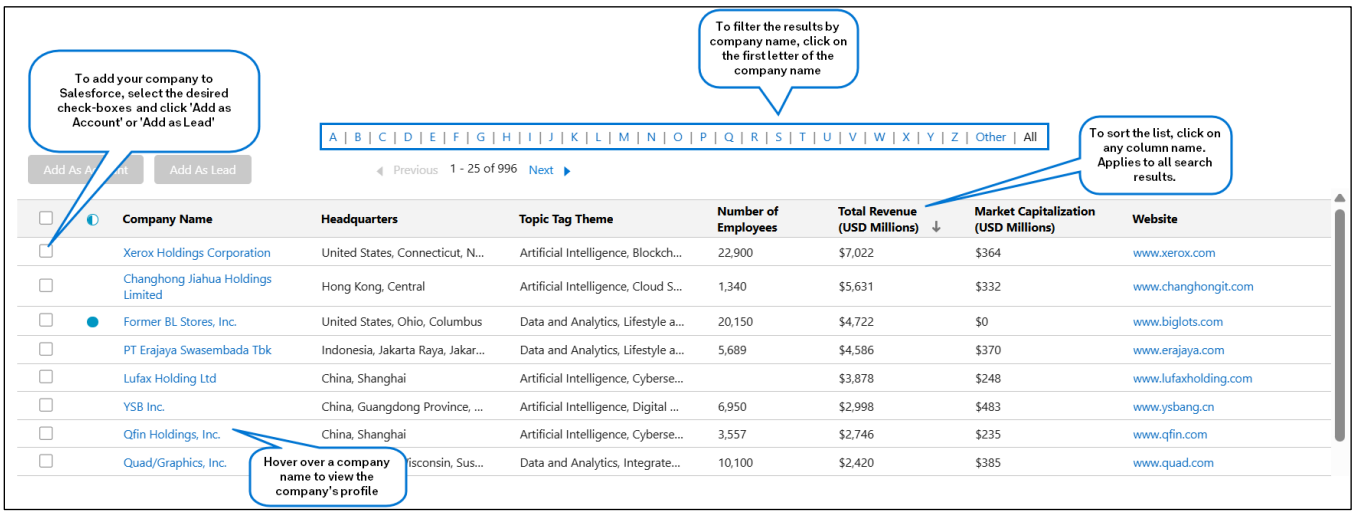
Companies

To obtain a list of companies meeting certain conditions, type or select your desired criteria in any combination of fields and then click Search

Note: If the words you have chosen are too specific, make your search more general by using fewer letters. This may return more options.



Your search results will appear. You may select any or all companies to add to Salesforce as an Account or Lead.



This icon indicates the company has already been imported as either an existing lead or account. When you hover your mouse over the blue icon, you can see whether the company is an existing lead or account. To filter by companies that have been imported, click the blue icon in the header row. Click the icon again to filter by companies that have not been imported.

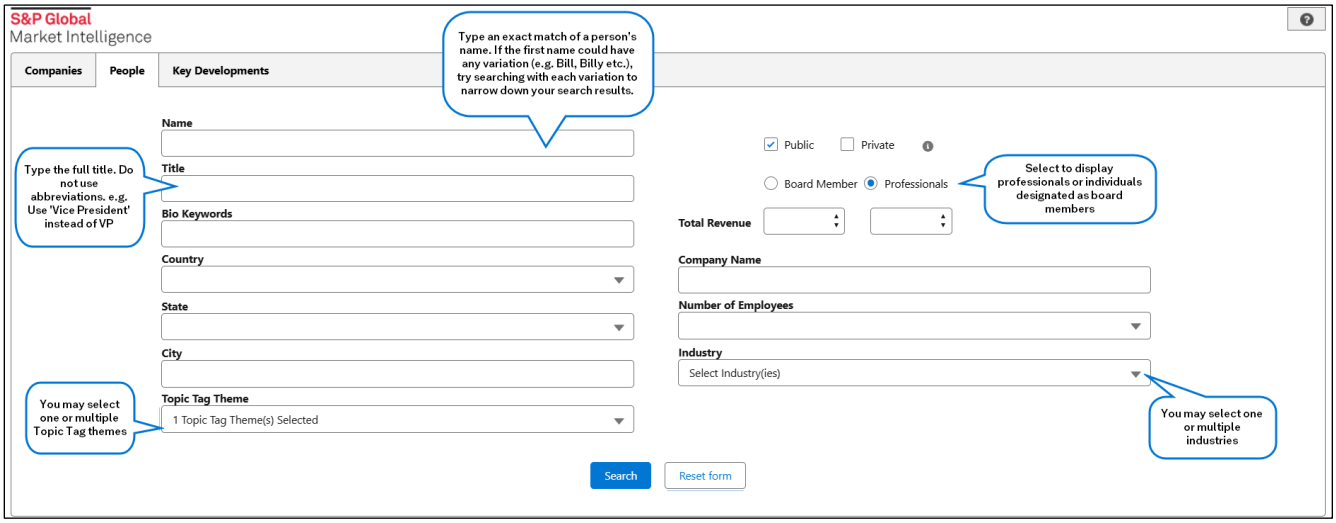
S&P Global
Market Intelligence

Former BL Stores, Inc.

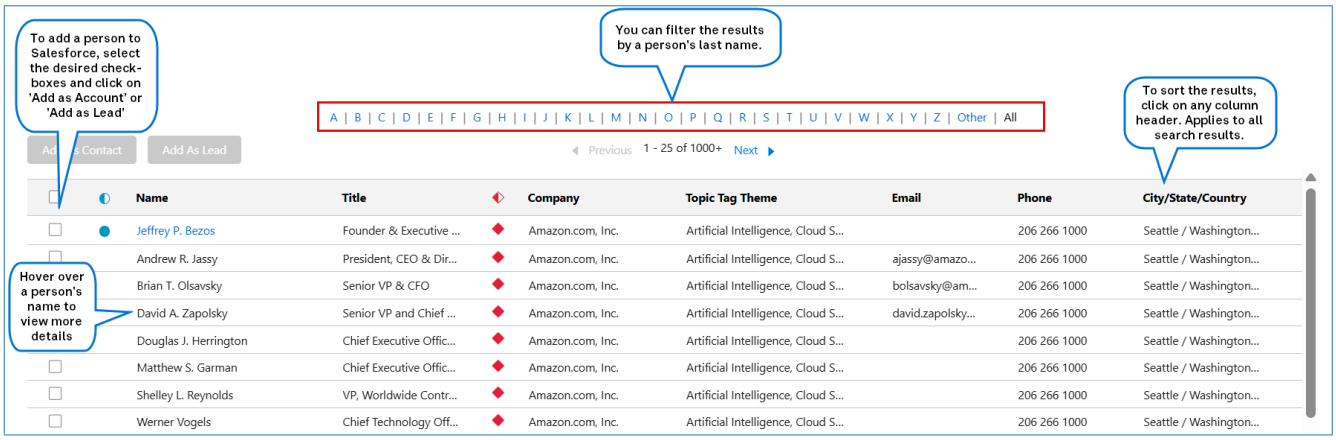
Company Type	Public Company
Company Status	Liquidating
Industry	Broadline Retail
Ticker Symbol	BIGG.Q
Business Description	Former BL Stores, Inc., through its subsidiaries, operates as a home discount retailer in the United States. The company offers products under various merchandising categories, suc...
Topic Tag Theme	Data and Analytics, Lifestyle and Wellness, Marketplace Platforms, Pet Products and Services
Topic Tags	Fast-Moving Consumer Goods, Lifestyle, Home Improvement, Online Grocery, Consumer Research, Pet Food and Supplies
Headquarters	United States, Ohio, Columbus
Capital IQ Company ID	26949
MI Company Key	4046897
Ultimate Parent Name	Former BL Stores, Inc.
Capital IQ Ultimate Parent ID	26949

People

To retrieve a list of individuals meeting certain conditions, type or select your desired criteria in any combination of fields and then click Search .



Your search results will appear. You may select any or all individuals to add to your Salesforce contacts.



S&P Global
Market Intelligence

Jeffrey P. Bezos

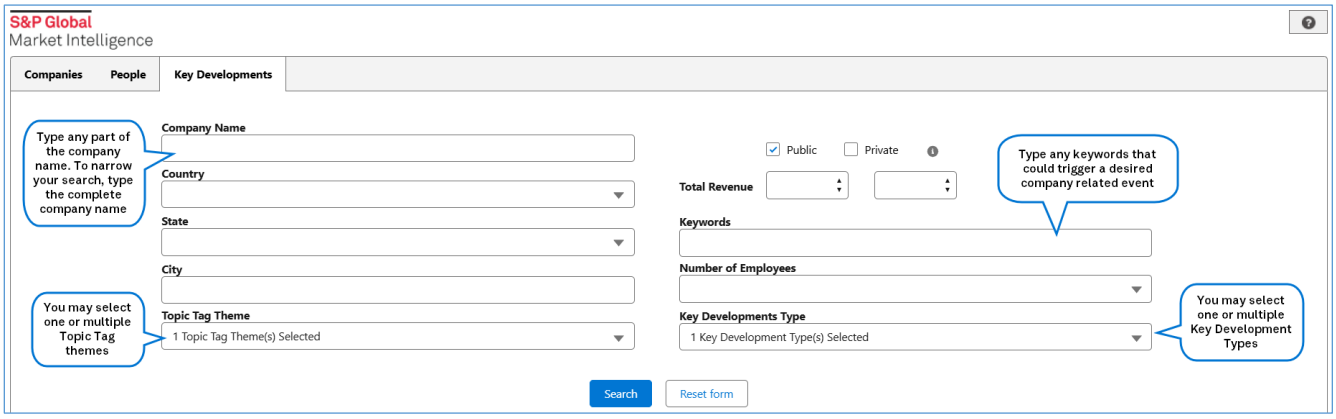
Title	Founder & Executive Chairman
Company Name	Amazon.com, Inc.
Description	Mr. Jeffrey P. Bezos, also known as Jeff, founded Amazon.com, Inc. in 1994 and has been its Executive Chair since July 5, 2021. He served as Chair of the Board at Amazon.com since 1994 and served as Chief Executive Officer from May 1996 until July 5, 2021 and as President from 1994 until June 1999 ...
Topic Tag Theme	Artificial Intelligence, Cloud Solutions, Data Center and Networking Technologies, Entertainment, Gaming, and Media, Marketing Technology
Topic Tags	GenAI, Ad Network, Cloud Data Services, Ad Targeting, Video Advertising, Artificial Intelligence, Ad Server, Digital Media, App Marketing, C...
Office Address	410 Terry Avenue North, Washington, United States, 98109-5210
Phone	206 266 1000

This icon indicates a Key Professional. A Key Professional is either an executive or a board member associated with a company. You can click this icon in the header row to sort by key professionals.

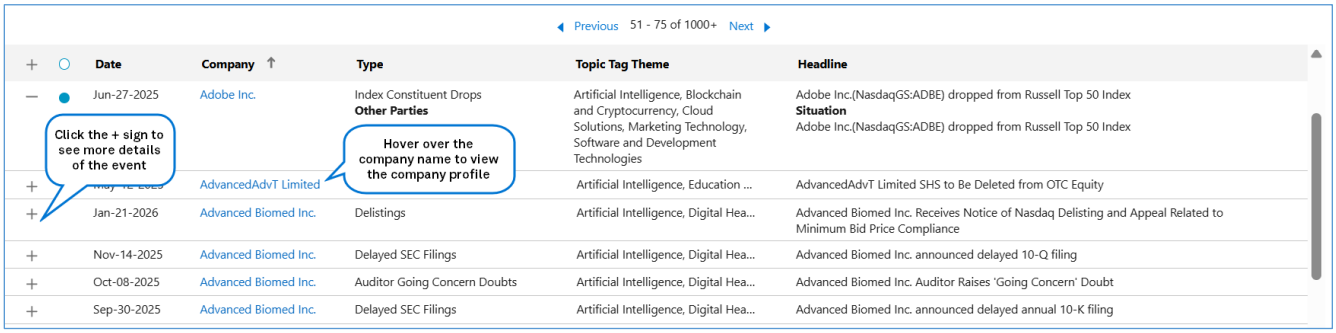
Key Developments

To get a list of companies based on certain events, type or select your desired criteria in any combination of fields and click Search.

Definitions for all Key Development Types are provided in the Appendix.



Your search results will reflect those events meeting your criteria for the past 12 months.



This icon indicates the company has already been imported as either an existing lead or account. When you hover your mouse over the blue icon, you can see whether the company is an existing lead or account. To sort by companies that have been imported, click the blue icon in the header row. Click the icon again to sort by companies that have not been imported.

S&P Global
Market Intelligence

Adobe Inc.

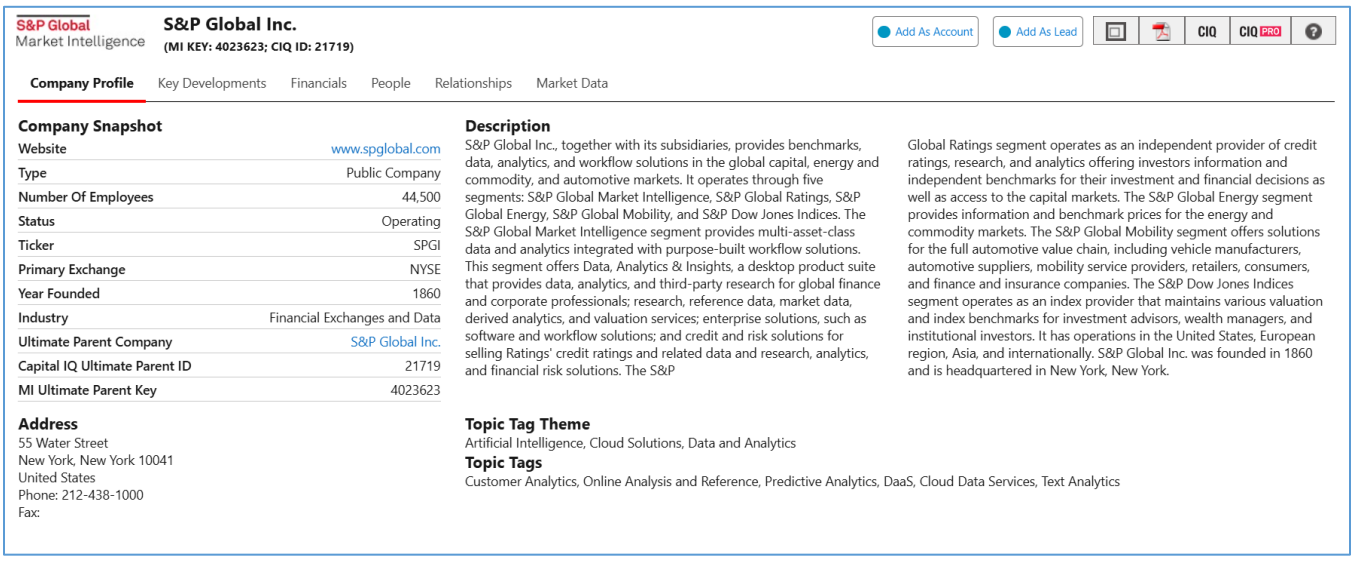
Company Type	Public Company
Company Status	Operating
Industry	Application Software
Ticker Symbol	ADBE
Business Description	Adobe Inc. operates as a technology company worldwide. The Digital Media segment offers products and services that enable individuals, teams, and enterprises to create, publish, an...
Topic Tag Theme	Content Creation, Software Development, Digital Media, Digital Asset Management, Web Development, Brand Marketing, Artificial Intelligence, ...
Topic Tags	Artificial Intelligence, Blockchain and Cryptocurrency, Cloud Solutions, Marketing Technology, Software and Development Technologies
Headquarters	United States, California, San Jose
Capital IQ Company ID	24321
MI Company Key	4047847
Ultimate Parent Name	Adobe Inc.
Capital IQ Ultimate Parent ID	24321

Company Drill Down

If you wish to see more company information, click the company name and another window will launch. Based on the data source, this window provides one tab or six tabs of related information.

Company Profile

The Company Profile tab displays company snapshot data, the company address and a detailed business description.



S&P Global Market Intelligence

S&P Global Inc.
(MI KEY: 4023623; CIQ ID: 21719)

Add As Account | Add As Lead | CIQ | CIQ PRO

Company Profile | Key Developments | Financials | People | Relationships | Market Data

Company Snapshot

Website	www.spglobal.com
Type	Public Company
Number Of Employees	44,500
Status	Operating
Ticker	SPGI
Primary Exchange	NYSE
Year Founded	1860
Industry	Financial Exchanges and Data
Ultimate Parent Company	S&P Global Inc.
Capital IQ Ultimate Parent ID	21719
MI Ultimate Parent Key	4023623

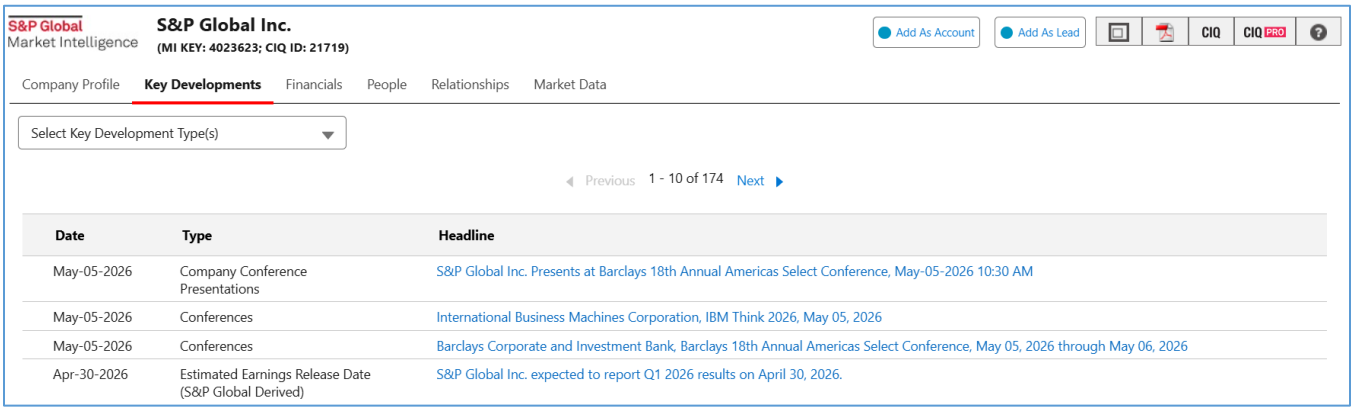
Address
55 Water Street
New York, New York 10041
United States
Phone: 212-438-1000
Fax:

Description
S&P Global Inc., together with its subsidiaries, provides benchmarks, data, analytics, and workflow solutions in the global capital, energy and commodity, and automotive markets. It operates through five segments: S&P Global Market Intelligence, S&P Global Ratings, S&P Global Energy, S&P Global Mobility, and S&P Dow Jones Indices. The S&P Global Market Intelligence segment provides multi-asset-class data and analytics integrated with purpose-built workflow solutions. This segment offers Data, Analytics & Insights, a desktop product suite that provides data, analytics, and third-party research for global finance and corporate professionals; research, reference data, market data, derived analytics, and valuation services; enterprise solutions, such as software and workflow solutions; and credit and risk solutions for selling Ratings' credit ratings and related data and research, analytics, and financial risk solutions. The S&P Global Ratings segment operates as an independent provider of credit ratings, research, and analytics offering investors information and independent benchmarks for their investment and financial decisions as well as access to the capital markets. The S&P Global Energy segment provides information and benchmark prices for the energy and commodity markets. The S&P Global Mobility segment offers solutions for the full automotive value chain, including vehicle manufacturers, automotive suppliers, mobility service providers, retailers, consumers, and finance and insurance companies. The S&P Dow Jones Indices segment operates as an index provider that maintains various valuation and index benchmarks for investment advisors, wealth managers, and institutional investors. It has operations in the United States, European region, Asia, and internationally. S&P Global Inc. was founded in 1860 and is headquartered in New York, New York.

Topic Tag Theme
Artificial Intelligence, Cloud Solutions, Data and Analytics
Topic Tags
Customer Analytics, Online Analysis and Reference, Predictive Analytics, DaaS, Cloud Data Services, Text Analytics

Key Developments

The Key Developments tab displays the key development date, type, and headline for the selected company.



S&P Global Market Intelligence

S&P Global Inc.
(MI KEY: 4023623; CIQ ID: 21719)

Add As Account | Add As Lead | CIQ | CIQ PRO

Company Profile | Key Developments | Financials | People | Relationships | Market Data

Select Key Development Type(s)

Previous 1 - 10 of 174 Next

Date	Type	Headline
May-05-2026	Company Conference Presentations	S&P Global Inc. Presents at Barclays 18th Annual Americas Select Conference, May-05-2026 10:30 AM
May-05-2026	Conferences	International Business Machines Corporation, IBM Think 2026, May 05, 2026
May-05-2026	Conferences	Barclays Corporate and Investment Bank, Barclays 18th Annual Americas Select Conference, May 05, 2026 through May 06, 2026
Apr-30-2026	Estimated Earnings Release Date (S&P Global Derived)	S&P Global Inc. expected to report Q1 2026 results on April 30, 2026.

See the Appendix for definitions of all available Key Development Types.

Financials

The Financials tab provides a series of financial metrics and calculated ratios. Up to 5 years of high-quality standardized financials are displayed, allowing you to view financial data on a consistent basis.

S&P Global Market Intelligence

S&P Global Inc.
(MI KEY: 4023623; CIQ ID: 21719)

Add As Account | Add As Lead | CIQ | CIQ PRO

Company Profile | Key Developments | **Financials** | People | Relationships | Market Data

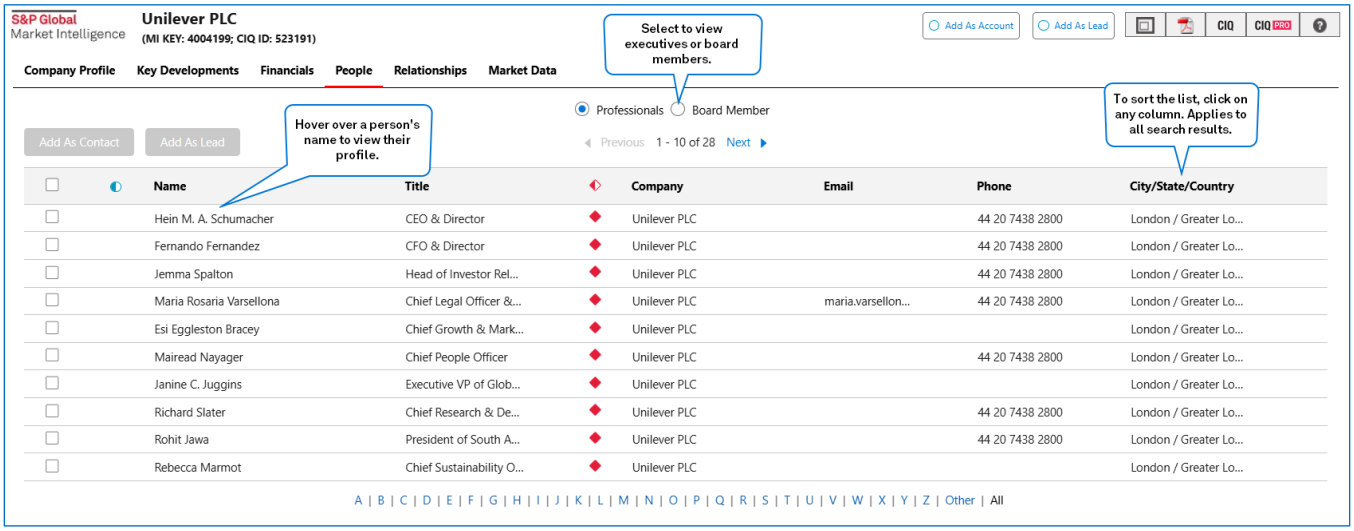
*** In Millions of USD, except per share items.**

Annual	Reclassified Annual	No Change from Original Annual	Reclassified Annual	Original Annual	Original LTM
Fiscal Period Ending	**Dec-31-2022**	**Dec-31-2023**	**Dec-31-2024**	**Dec-31-2025**	**Mar-31-2026**
Filing Date	**Feb-11-2025**	**Feb-11-2026**	**Feb-11-2026**	**Feb-11-2026**	**Apr-28-2026**
Currency	**USD**	**USD**	**USD**	**USD**	**USD**
Total Revenue	11,181.00	12,497.00	0.00	15,336.00	15,730.00
Gross Profit	7,428.00	8,356.00	0.00	10,773.00	11,085.00
EBIT	3,941.00	4,573.00	0.00	6,465.00	6,680.00
EBITDA	4,954.00	5,716.00	0.00	7,644.00	7,873.00
Net Income	3,248.00	2,626.00	0.00	4,471.00	4,776.00
Diluted EPS	10.20	8.23	0.00	14.66	15.80
Total Assets	61,784.00	60,589.00	0.00	61,200.00	60,792.00
Total Liabilities	22,040.00	22,489.00	0.00	25,048.00	24,587.00
Total Equity	39,744.00	38,100.00	0.00	36,152.00	36,205.00

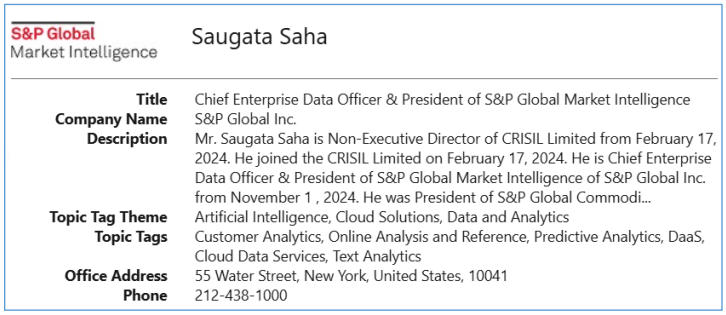
See the Appendix for definitions of all Financial Data Items.

People

The People tab displays professionals and board members affiliated with the selected company.



◆ This icon indicates a Key Professional. You can click this icon in the header row to sort by key professionals.



Professionals

Professionals are individuals that currently hold an executive-level position within a company.

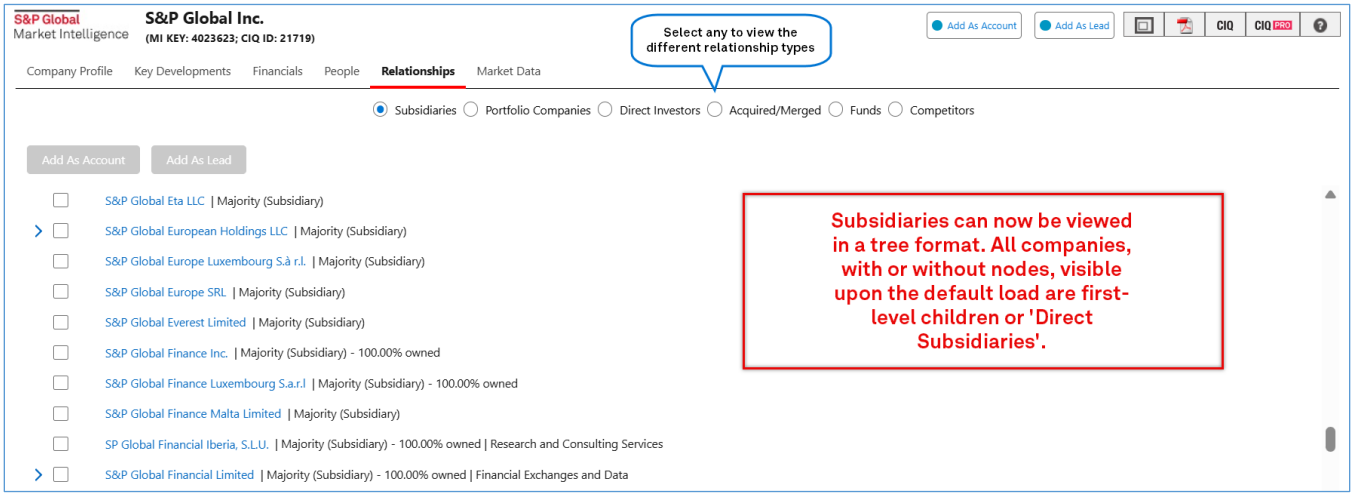
Board Members

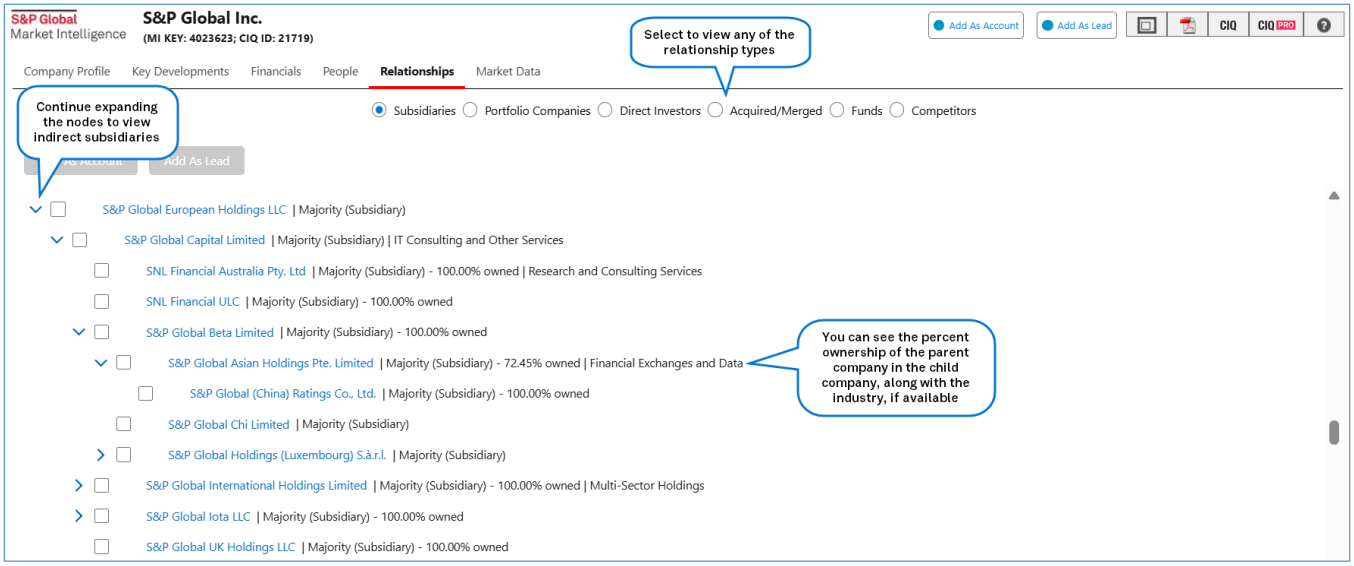
Board members are those individuals that currently hold a membership on a board.

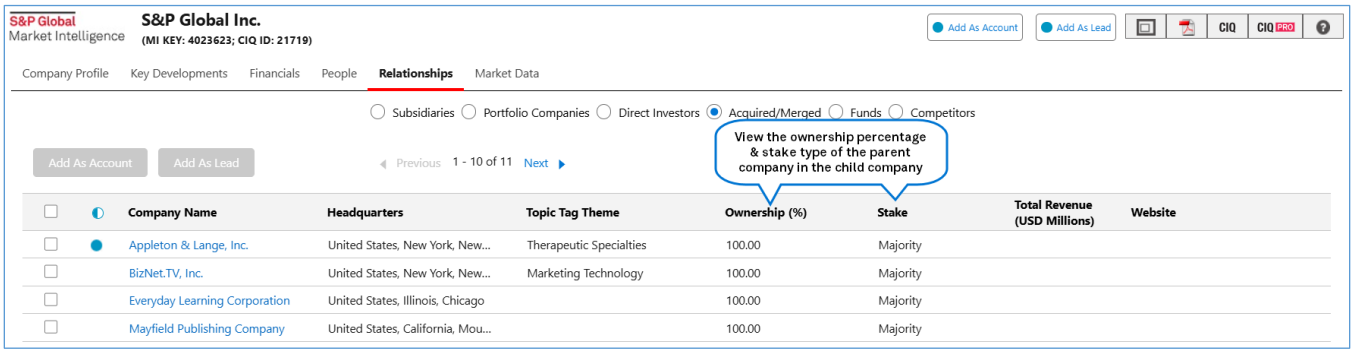
Relationships

The relationships tab displays all current relationships that exist for the selected company. Relationship types include the following:

- Subsidiaries / Operating Units
- Portfolio Companies (Direct Investments)
- Direct Investors
- Acquired/Merged entities
- Funds (Fund Sponsors)







- This icon indicates the company has already been imported as either an existing lead or account. When you hover your mouse over the blue icon, you can see whether the company is an existing lead or account. To sort by companies that have been imported, click the blue icon in the header row. Click the blue icon again to sort by companies that have not been imported.

Subsidiaries

Subsidiaries are determined by the parent company owning *more than* 50% equity in the child company. Otherwise, the child company is considered a direct investment.

Consists of both direct and indirect subsidiaries. Direct subsidiaries are relationships where the parent has a direct stake of over 50% in the child company. An indirect subsidiary is a relationship where the parent has a direct stake in the child company, and the child company has a direct stake of more than 50% in another company.

Portfolio Companies (Direct Investments)

These represent the current investments of a company. Portfolio companies are determined by the parent company holding a minority stake (less than 50% equity) in another company for strategic or non-strategic reasons. Otherwise, the child company is considered a subsidiary.

Direct Investors

This returns the companies which have invested in the base company they're currently viewing on screen.

Acquired/Merged

This represents a strategic relationship between a buyer and a company in which the company has been purchased, and all its assets and operations are absorbed into the buyer. A merged entity relationship is used only for cases where two companies "merge" into one and there is only one surviving entity.

Funds

Represents current fund sponsors. A fund sponsor initiates, promotes, and establishes an investment fund. management.

Competitors

S&P Global Market Intelligence for Salesforce identifies competitors of companies through:

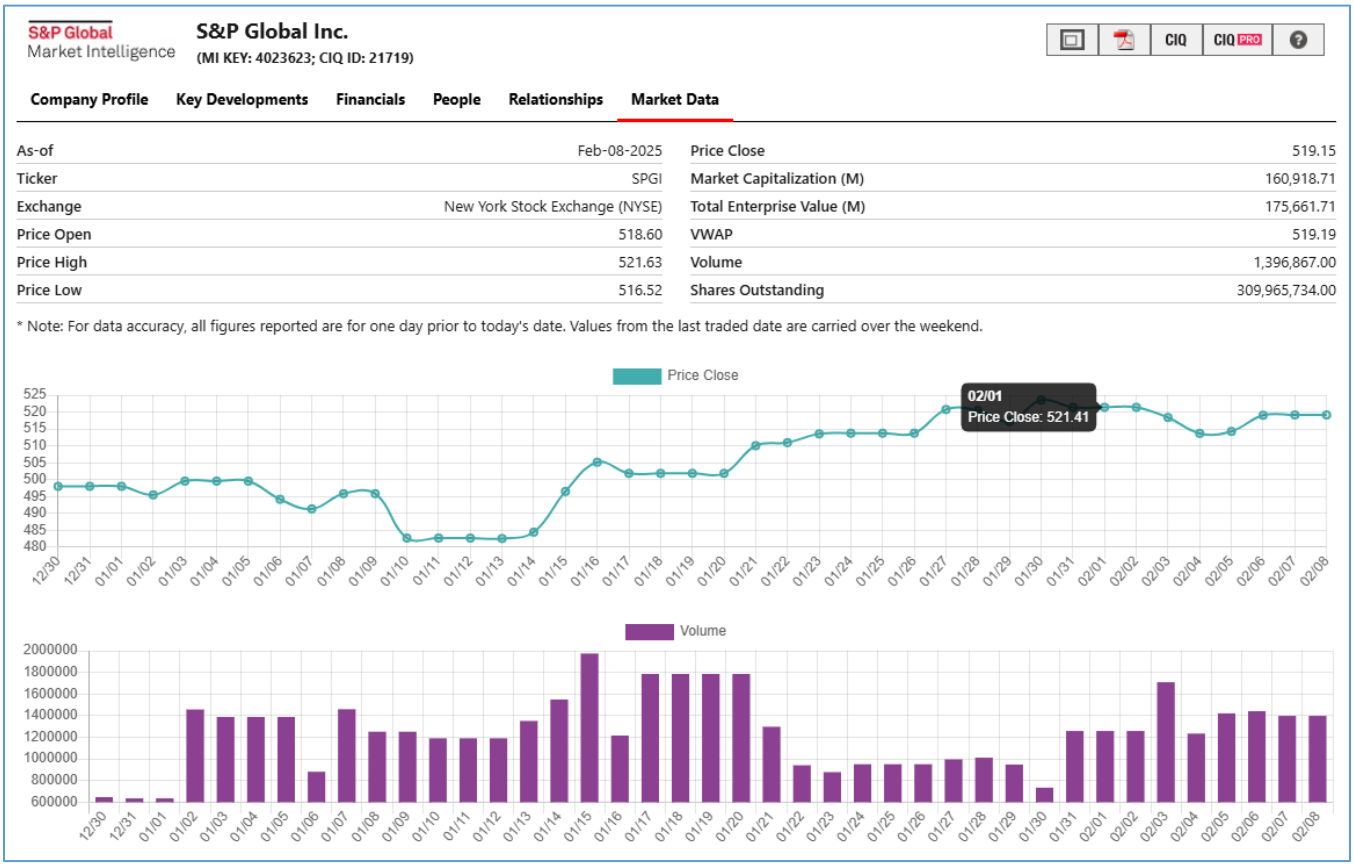
- Source filings.
- News and event items.
- Direct company contacts.
- Companies named by a third party.
- Companies named by a company.
- Companies named by a competitor.

Market Data

The Market Data tab includes select stock price and associated market capitalization information. Users can view the data either in USD or in the company's primary trading item currency.

Some key points:

1) Key attributes are displayed as available on the 'As-of' date.
2) Values from the last traded date are carried over the weekend.
3) Price Close and Volume charts are plotted for a period of 45 days. Data in the chart is updated for N-7 days, with N being the As-of date.



For more details on each of the data items available under Market Data, please refer the appendix.

Add Content to Salesforce

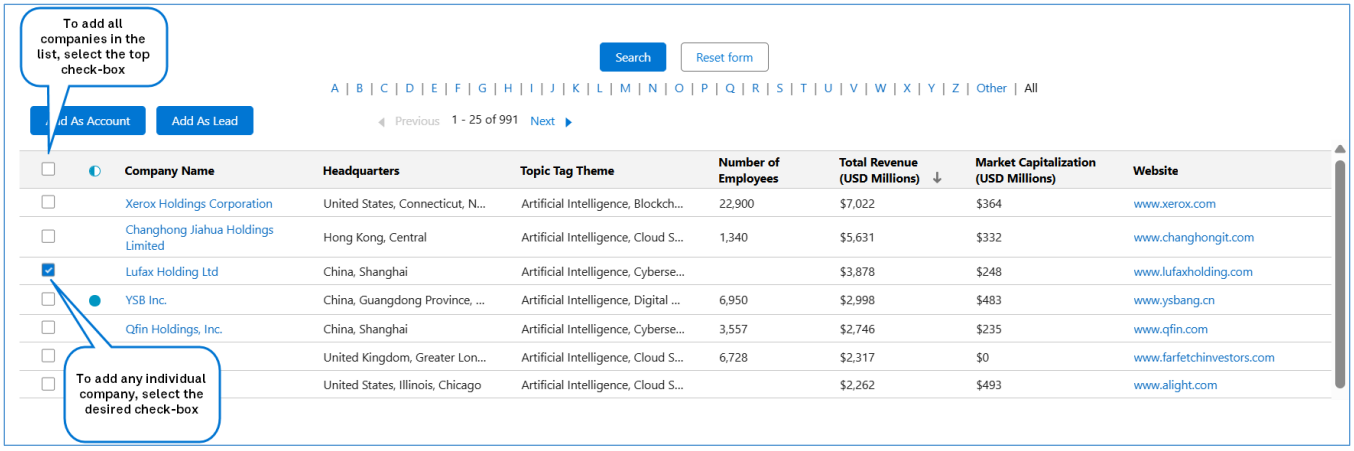
S&P Global Market Intelligence for Salesforce allows you to add:

- companies as Leads or Accounts
- people as Leads or Contacts

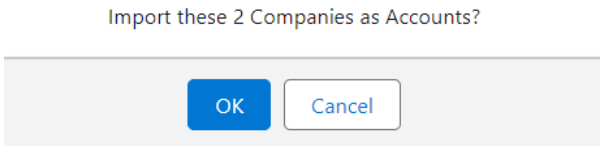
Add existing companies to your instance of Salesforce from S&P Global Market Intelligence for Salesforce

If you wish to add an existing company to your instance of Salesforce from S&P Global Market Intelligence for Salesforce as either a lead or account, simply click the checkbox next to the Company Name and click either of the buttons below:

If you'd like to select all companies on the list, select the checkbox on the top row.



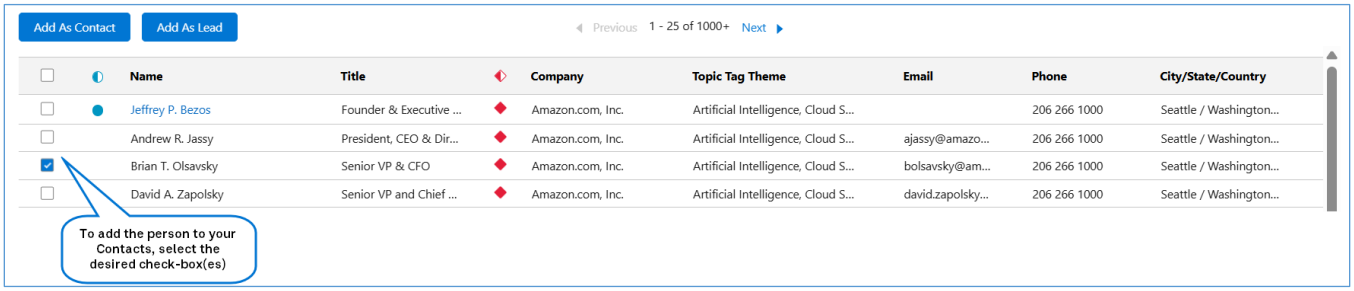
This icon indicates the company has already been imported as either an existing lead or account. When you hover your mouse over the blue icon, you can see whether the company is an existing lead or account. To sort by companies that have been imported, click the blue icon in the header row. Click the icon again to sort by companies that have not been imported.

You will be prompted to confirm your selections.	After clicking OK, Salesforce will confirm the addition(s).
	

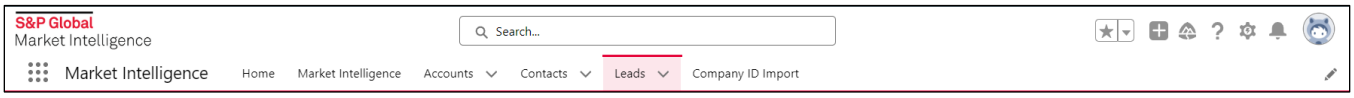
Add existing contacts to your instance of Salesforce from S&P Global Market Intelligence for Salesforce

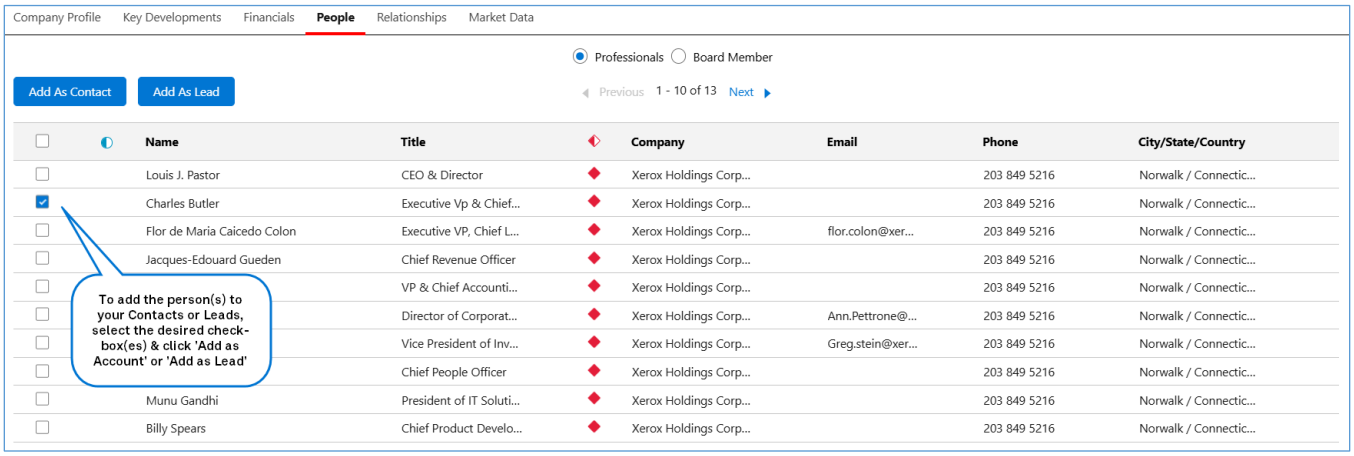
If you wish to add an existing contact to your instance of Salesforce as either a Lead or an Account, simply click the checkbox next to the Person's Name and click either of the buttons below:

You may add people that appear in the search function. If you'd like to select all people on the list, select the checkbox on the top row.



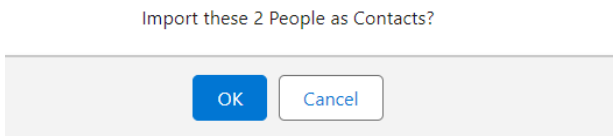
You may also add people appearing under the People tab within the **Leads** view or the **Accounts** view.





This icon indicates the contact has already been imported as an account. You can click this icon in the header row to sort by contacts that have been imported. Click the icon again to sort by contacts that have not been imported.

This icon indicates the professional as a Key Professional. You can click this icon in the header row to sort by key professionals.

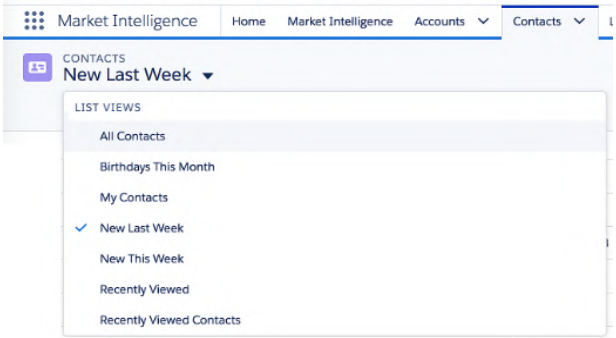
You will be prompted to confirm your selections.  	After clicking **OK**, Salesforce will confirm the addition(s).

View your Contacts, Leads and Accounts

Contacts

1. To view your contacts, select the Contacts tab on the top menu.

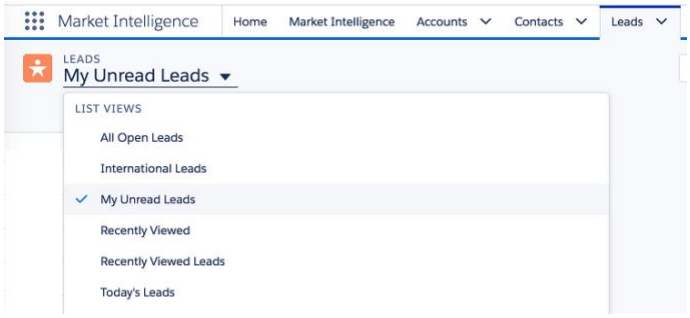
2. Select your desired view by clicking the dropdown arrow.



Leads

1. To view your leads, select the Leads tab on the top menu.

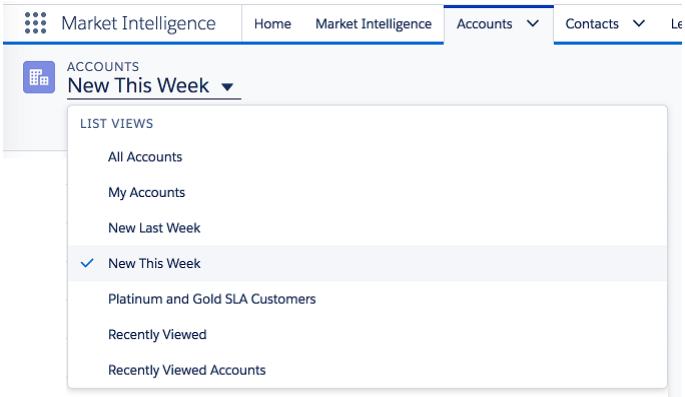
2. Select your desired view by clicking the dropdown arrow.



Accounts

1. To view your contacts, select the Accounts tab on the top menu.

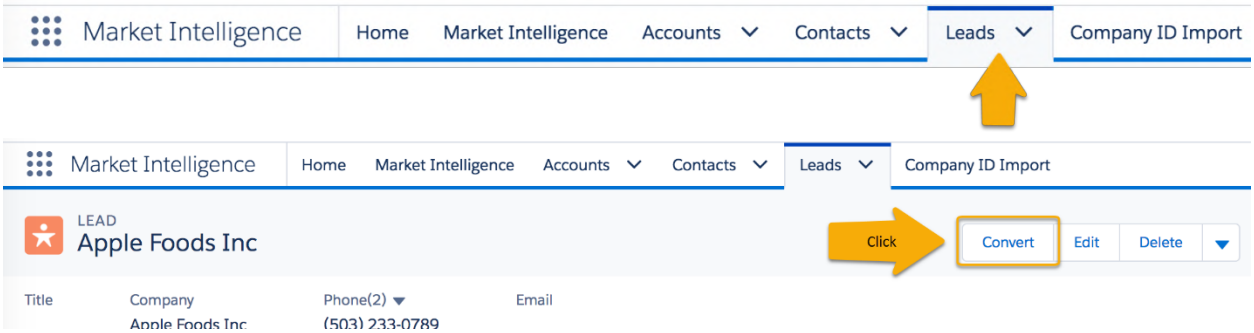
2. Select your desired view by clicking the dropdown arrow.



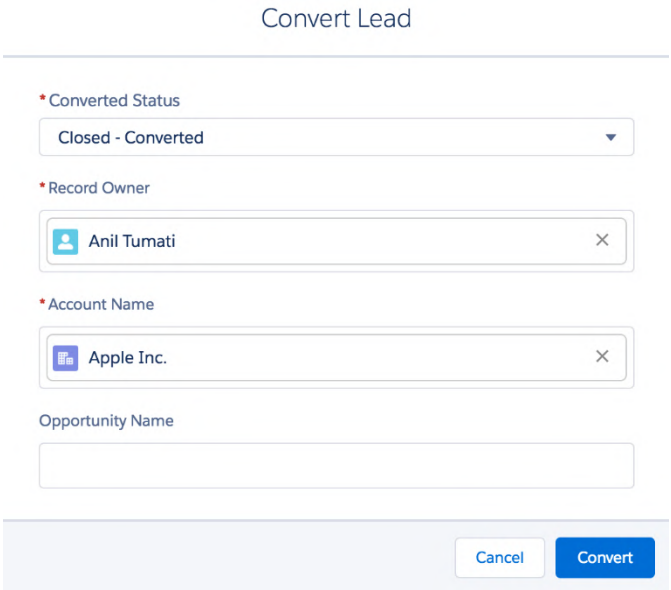
Convert a Company Lead to an Account

To convert a company lead to an account, follow the steps below:

1. Click the Convert button on the Lead Detail page under the **Leads** tab.



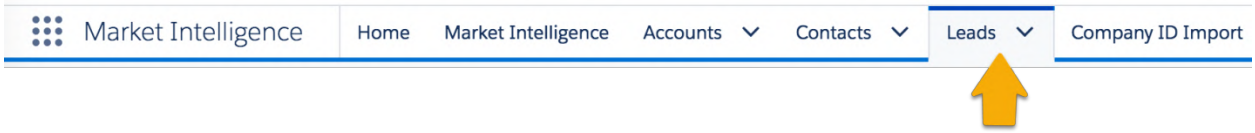
2. Complete the mandatory fields on the Convert Lead page and then click the Convert button.

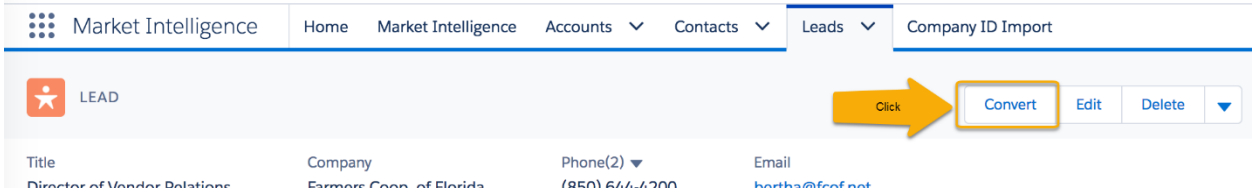


Convert a People Lead to a Contact

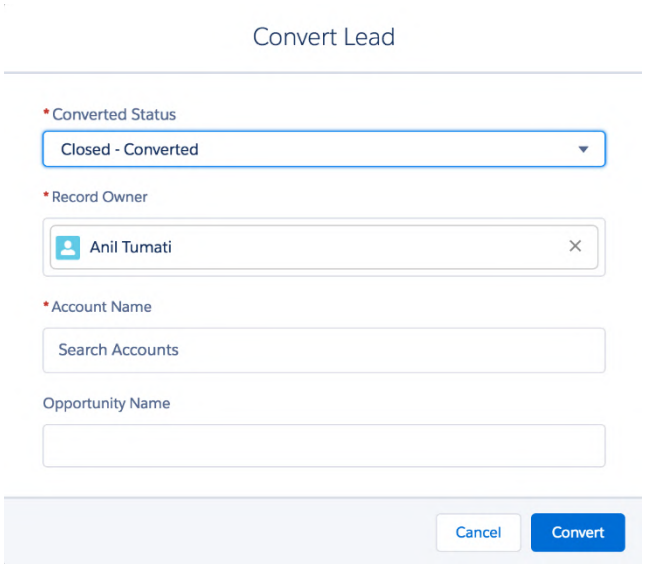
To convert a people lead to a contact, follow the steps below.

1. Click the Convert button on the Lead Detail page under the **Leads** tab.





2. Complete the mandatory fields on the Convert Lead page and then click the Convert button.

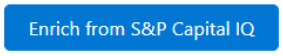


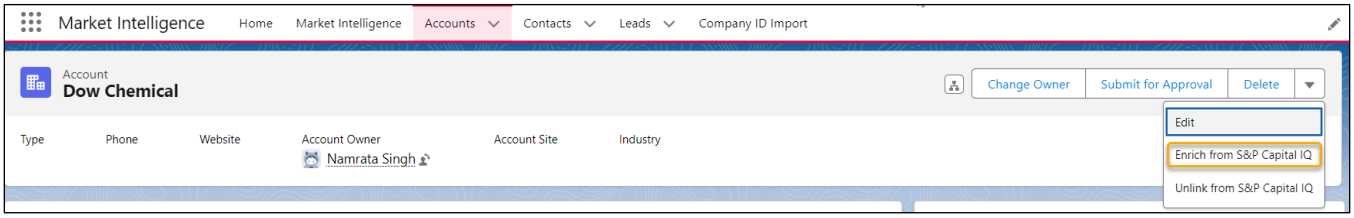
When converting leads, please use the native lead conversion mapping functionality to map custom S&P Capital IQ fields on the leads to the appropriate S&P Capital IQ fields on Contacts and Accounts.

Account

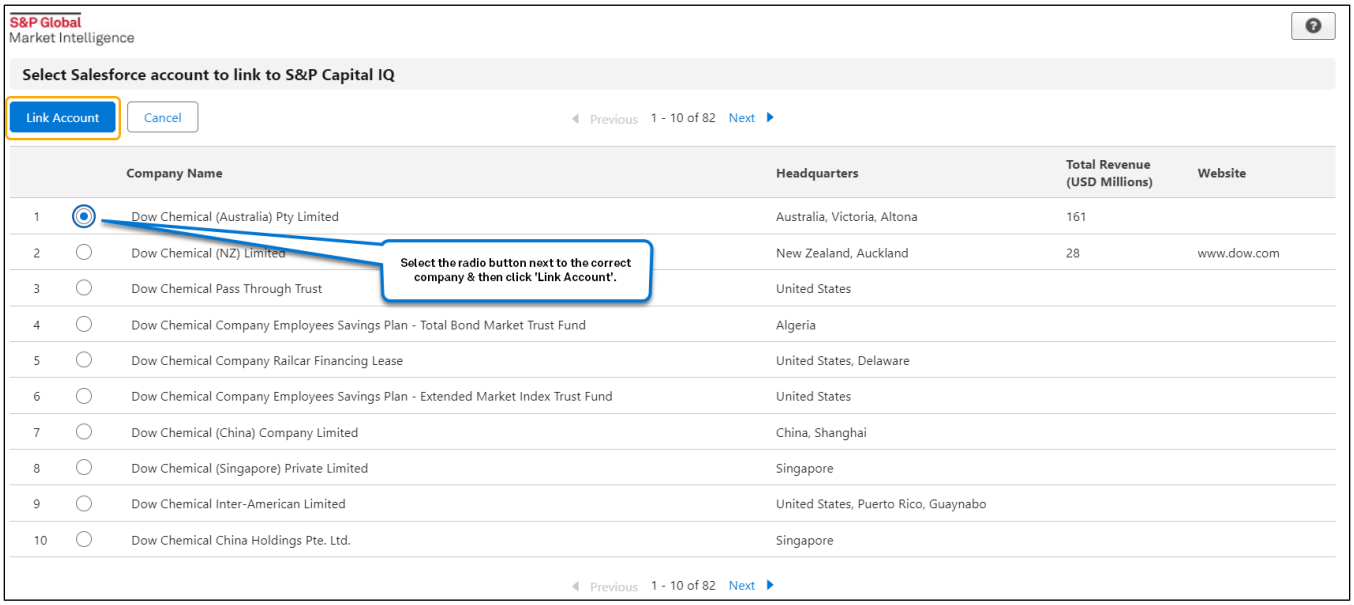
If you wish to add new information or refresh existing information in an account, the following fields may be enriched with S&P Capital IQ data:

- Company Name
- Billing Address
- Primary Industry
- Website
- Number of Employees
- Description
- Fax
- Phone
- Ticker Symbol

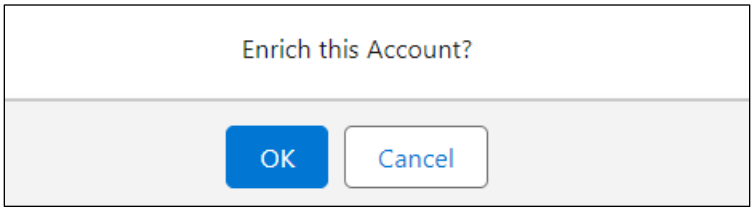
To enrich your account, navigate to your Account and click 



A list of companies which closely match the account name will display.

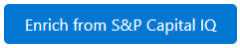


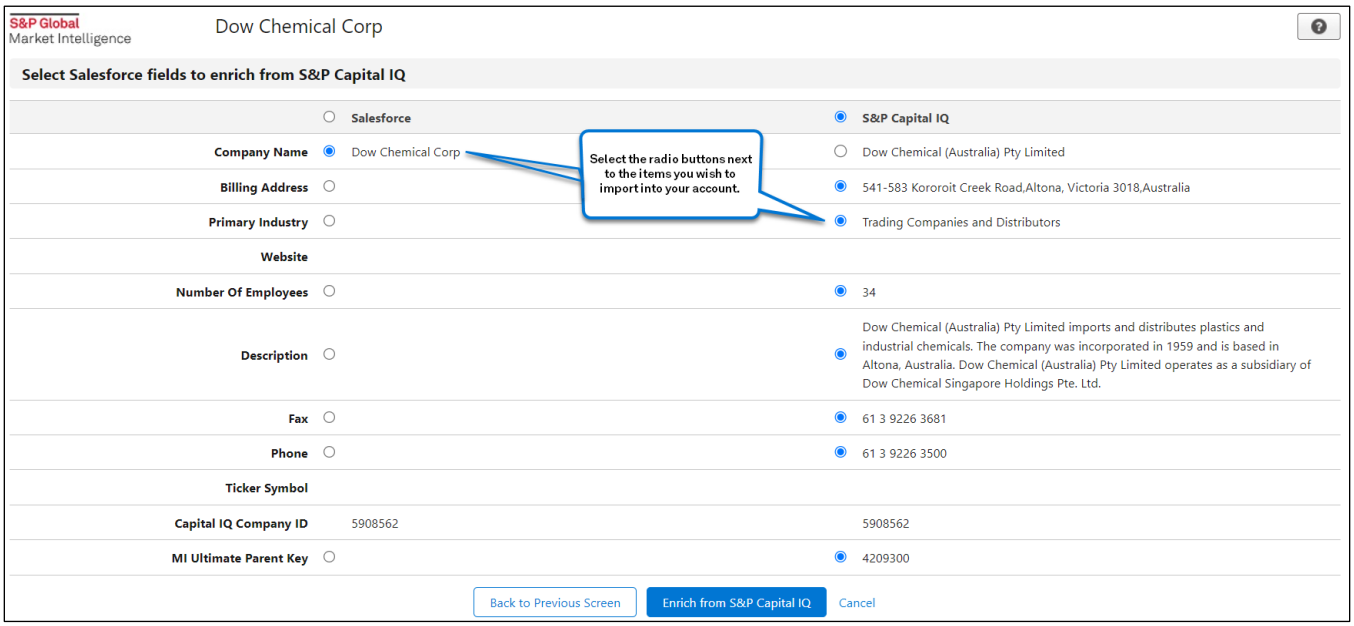
You will be prompted to confirm your selection.



Salesforce will display the existing account information in Salesforce and the information appearing in the S&P Capital IQ and Capital IQ Pro platforms.

Select the radio buttons next to the items you wish to import into your account and click





Your account will be populated with S&P Capital IQ and Capital IQ Pro platform content.

Account
Apple Inc.

Type	Phone	Website	Account Owner	Account Site	Industry
	408 996 1010	www.apple.com	Namrata Singh		

Standard fields enriched on the Account Object.

Related | **Details**

Account Information

Account Owner: Namrata Singh	Rating:
Account Name: Apple Inc.	Phone: 408 996 1010
Parent Account:	Fax:
Account Number:	Website: www.apple.com
Account Site:	Ownership:
Type:	Employees: 161,000
Ticker Symbol: AAPL	SIC Code:

Address Information

Billing Address: One Apple Park Way Cupertino, California 95014 United States	Shipping Address:

Description Information

Description

Apple Inc. designs, manufactures, and markets smartphones, personal computers, tablets, wearables, and accessories worldwide. The company offers iPhone, a line of smartphones; Mac, a line of personal computers; iPad, a line of multi-purpose tablets; and wearables, home, and accessories comprising AirPods, Apple TV, Apple Watch, Beats products, and HomePod. It also provides AppleCare support and cloud services; and operates various platforms, including the App Store that allow customers to discover and download applications and digital content, such as books, music, video, games, and podcasts. In addition, the company offers various services, such as Apple Arcade, a game subscription service; Apple Fitness+, a personalized fitness service; Apple Music, which offers users a curated listening experience with on-demand radio stations; Apple News+, a subscription news and magazine service; Apple TV+, which offers exclusive original content; Apple Card, a co-branded credit card; and Apple Pay, a cashless payment service, as well as licenses its intellectual property. The company serves consumers, and small and mid-sized businesses; and the education, enterprise, and government markets. It distributes third-party applications for its products through the App Store. The company also sells its products through its retail and online stores, and direct sales force; and third-party cellular network carriers, wholesalers, retailers, and resellers. Apple Inc. was founded in 1976 and is headquartered in Cupertino, California.

S&P Capital IQ Description

Apple Inc. designs, manufactures, and markets smartphones, personal computers, tablets, wearables, and accessories worldwide. The company offers iPhone, a line of smartphones; Mac, a line of personal computers; iPad, a line of multi-purpose tablets; and wearables, home, and accessories comprising AirPods, Apple TV, Apple Watch, Beats products, and HomePod. It also provides AppleCare support and cloud services; and operates various platforms, including the App Store that allow customers to discover and download applications and digital content, such as books, music, video, games, and podcasts. In addition, the company offers various services, such as Apple Arcade, a game subscription service; Apple Fitness+, a personalized fitness service; Apple Music, which offers users a curated listening experience with on-demand radio stations; Apple News+, a subscription news and magazine service; Apple TV+, which offers exclusive original content; Apple Card, a co-branded credit card; and Apple Pay, a cashless payment service, as well as licenses its intellectual property. The company serves consumers, and small and mid-sized businesses; and the education, enterprise, and government markets. It distributes third-party applications for its products through the App Store. The company also sells its products through its retail and online stores, and direct sales force; and third-party cellular network carriers, wholesalers, retailers, and resellers. Apple Inc. was founded in 1976 and is headquartered in Cupertino, California.

S&P Capital IQ for Salesforce

S&P Capital IQ Company ID	21719
S&P MI Company Key	4023623
S&P Capital IQ Company Type	Public Company
S&P Capital IQ Company Status	Operating
S&P Capital IQ Primary Industry	Financial Exchanges and Data
S&P Capital IQ Primary Exchange	NYSE
S&P Capital IQ Topic Tags	Customer Analytics, Online Analysis and Reference, Predictive Analytics, DaaS, Cloud Data Services, Text Analytics
S&P Capital IQ Topic Tag Theme	Artificial Intelligence, Cloud Solutions, Data and Analytics

S&P Capital IQ Ultimate Parent Company	S&P Global Inc.
S&P Capital IQ Ultimate Parent CompanyID	21719
S&P MI Ultimate Parent Key	4023623
S&P Capital IQ Revenue (USD)	15,336,000,000
S&P Capital IQ Year Founded	1860
S&P Capital IQ Pricing Date	5/9/2026
S&P Capital IQ Market Cap. (USD)	124,346,954,593
S&P Capital IQ Last Updated Date	5/9/2026

Includes Market Intelligence Company Key Identifiers

Update Account Data

Update Data

Click to refresh data

S&P Capital IQ

S&P Global Market Intelligence

S&P Global Inc.
(MI KEY: 4023623; CIQ ID: 21719)

Click on any tab to view content

Click to see full view of the Account

Generate a PDF tearsheet

CIQ | CIQ PRO

Login to S&P Capital IQ Platform. If you are already logged in, the respective company & the associated page will appear

Login to S&P Capital IQ Pro Platform. If you are already logged in, the respective company & the associated page will appear

Hover over this icon to get S&P Global Market Intelligence client support phone number. Click to send an email directly to client support

Company Profile | Key Developments | Financials | People | Relationships

Company Snapshot

Website	www.spglobal.com
Type	Public Company
Number Of Employees	44,500
Status	Operating
Ticker	SPGI
Primary Exchange	NYSE
Year Founded	1860
Industry	Financial Exchanges and Data
Ultimate Parent Company	S&P Global Inc.
Capital IQ Ultimate Parent ID	21719
MI Ultimate Parent Key	4023623

Description

S&P Global Inc., together wi… provides benchmarks, data, … solutions in the global capital, energy and commodity, and automotive markets. It operates through five segments: S&P Global Market Intelligence, S&P Global Ratings, S&P Global Energy, S&P Global Mobility, and S&P Dow Jones Indices. The S&P Global Market Intelligence segment provides multi-asset-class data and analytics integrated with purpose-built workflow solutions. This segment offers Data, Analytics & Insights, a desktop product suite that provides data, analytics, and third-party research for global finance and corporate professionals; research, reference data, market data, derived analytics, and valuation services; enterprise solutions, such as software and workflow solutions; and credit and risk solutions for selling Ratings' credit ratings and related data and research, analytics, and financial risk solutions. The S&P … offering in… benchmar… decisions … S&P Glob… benchmark… markets. The S&P Global Mobility segment offers solutions for the full automotive value chain, including vehicle manufacturers, automotive suppliers, mobility service providers, retailers, consumers, and finance and insurance companies. The S&P Dow Jones Indices segment operates as an index provider that maintains various valuation and index benchmarks for investment advisors, wealth managers, and institutional investors. It has operations in the United States, European region, Asia, and internationally. S&P Global Inc. was founded in 1860 and is headquartered in New York, New York.

Address

55 Water Street
New York, New York 10041
United States
Phone: 212-438-1000
Fax:

Topic Tag Theme

Customer Analytics, Online Analysis and Reference, Predictive Analytics, DaaS, Cloud Data Services, Text Analytics

Topic Tags

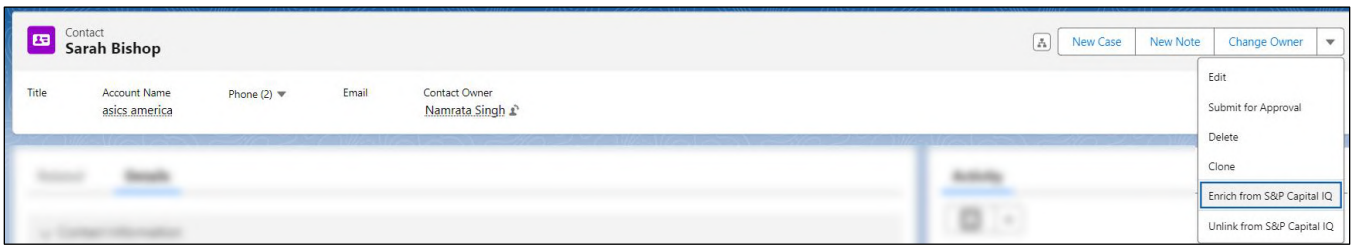
Artificial Intelligence, Cloud Solutions, Data and Analytics

Contacts

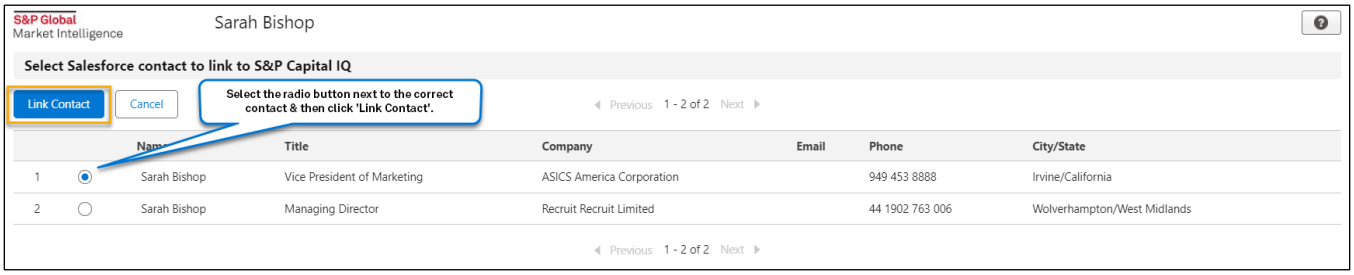
If you wish to add new information or refresh existing information for a contact, the following fields may be enriched with S&P Capital IQ and Capital IQ Pro platform data:

- First Name
- Last Name
- Title
- Email
- Country
- State
- City
- Office Address
- Phone
- Description

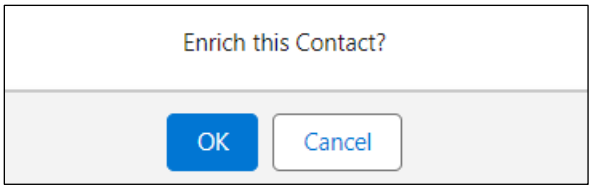
To enrich the data for your contact, navigate to your contact name and click "Enrich from S&P Capital IQ".



A list of contacts which closely match the contact name will be displayed.

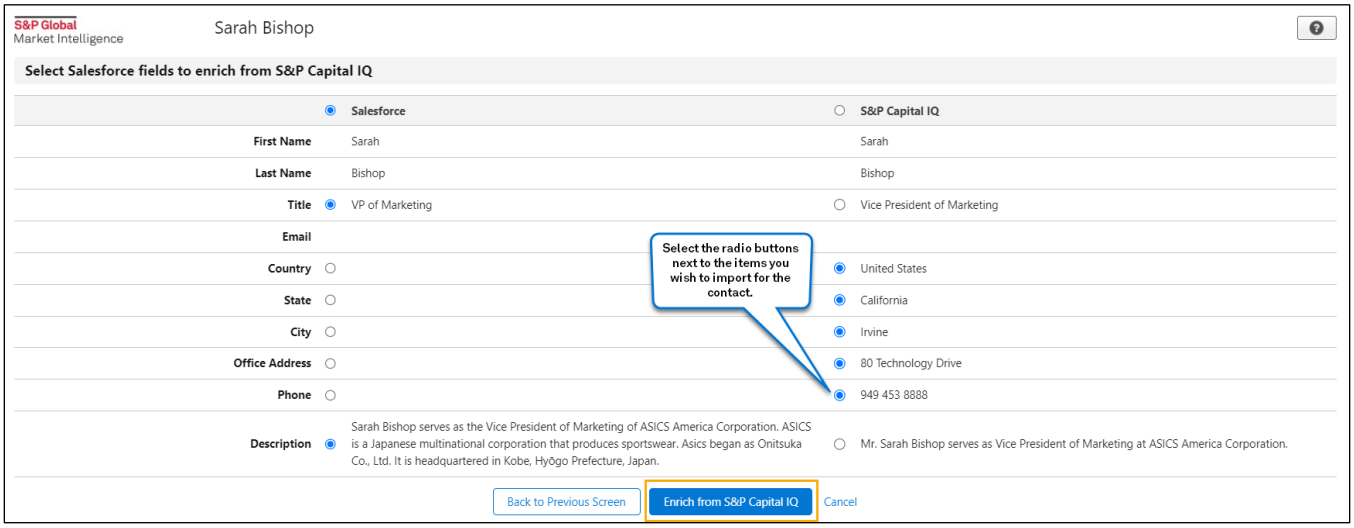


You will be prompted to confirm your selection.



Salesforce will display the existing account information in Salesforce and the information appearing in the S&P Capital IQ and Capital IQ Pro platform.

Select the radio buttons next to the items you wish to import for your contact and click Enrich from S&P Capital IQ



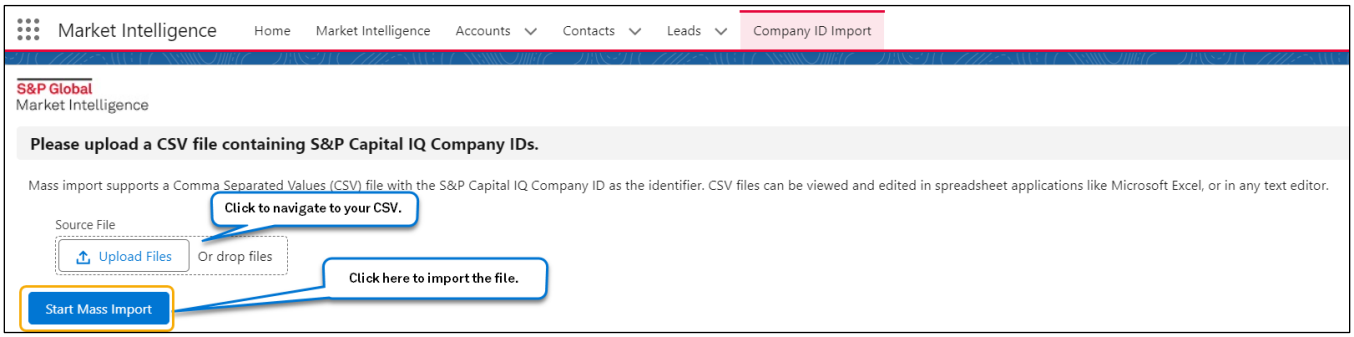
Your contact will be populated with S&P Capital IQ and Capital IQ Pro platform content.

Automatically create accounts by uploading a list of S&P Capital IQ Company IDs

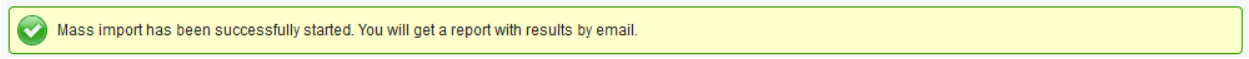
With S&P Global Market Intelligence for Salesforce, you can automatically create accounts by uploading a list of S&P Capital IQ Company IDs. Start by creating a list of S&P Capital IQ Company IDs in a .csv format. Below is an example:

ID LIST
259378
4204816
27763231
258769
279513
260149
259627
22357184
368470
323857

On the top toolbar, select the Company ID Import tab and follow the directions below:



When the upload completes, a confirmation message displays:

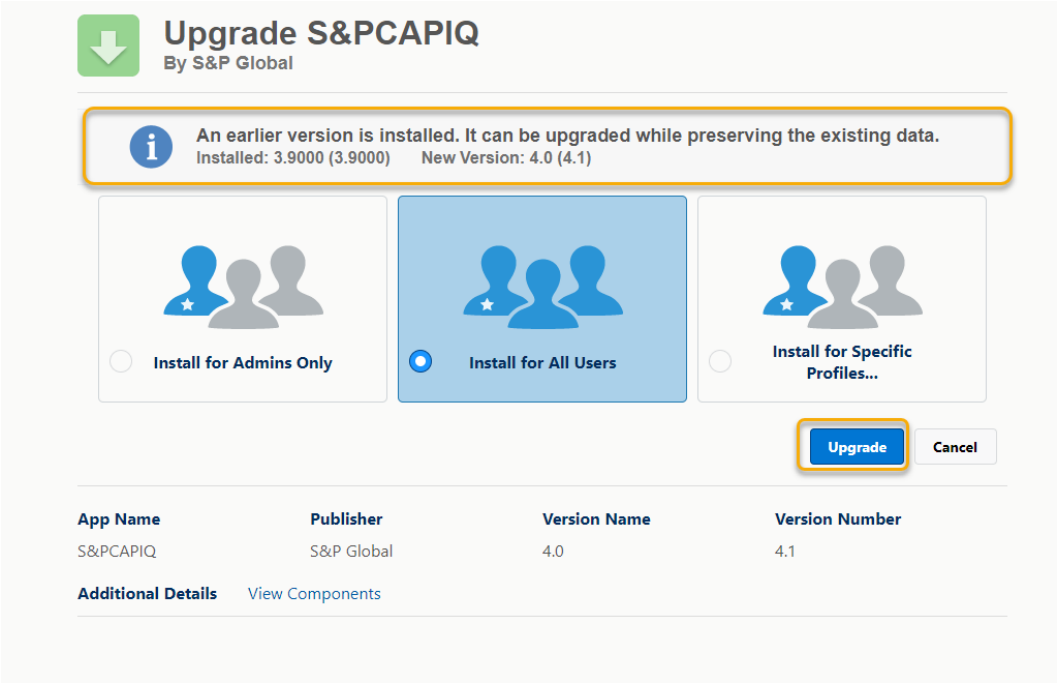


A report of the upload will be sent to you by email.

Company Id	Company Name
289194	3M Company
24445	Affiliated Managers Group Inc.
247483	Abbott Laboratories
203028	ACE Limited
655542	Aetna Inc.
24321	Adobe Systems Incorporated
250178	AFLAC Inc.
141885706	AbbVie Inc.
36478	Actavis plc
972190	Accenture plc

Upgrading Your App

Periodically, S&P Global will release new versions of the app. To upgrade, Visit the AppExchange S&P Global Market Intelligence for Salesforce listing and select "Get It Now". As you follow the prompts, you will see a notice from Salesforce to upgrade the earlier version while preserving the existing data.



To learn more about upgrading, visit our Installation Guide on the AppExchange with more specific instructions.

Appendix

Company Types

Type	Definition
Public Company	A legal entity whose equity is actively trading on any public stock exchange in any country where S&P Global Market Intelligence receives pricing for the company.
Public Investment Firm	A publicly listed firm that makes investments in the form of purchase and sale of public and private equity or debt and other securities, as well as real estate assets. Public Investment Firms may be institutional asset managers, mutual or hedge fund sponsors, pension fund managers, private equity sponsors, or real estate investment firms.
Private Investment Firm	A privately held firm that makes investments in the form of purchase and sale of public or private equity or debt and other securities, as well as real estate assets. Private Investment Firms may be institutional asset managers, mutual or hedge fund sponsors, pension fund managers, private equity sponsors, or real estate investment firms.
Private Company	A legal entity, which is not an investment firm, whose equity does not trade on any public stock exchange. This includes companies listed on a stock exchange where S&P Global Market Intelligence does not receive pricing for the company. This also includes any private company that is also in the Private Company type that also has publicly-owned debt.
Corporate Investment Arm	A principal investment firm (PIF) that is majority-owned by any corporation other than a financial services company or another investment firm. Includes all privately held firms making direct private equity investments and all private equity fund-of-funds that are over 50% owned by another company. Does NOT include any other investment firm type, such as hedge fund sponsors, mutual funds or pension funds, or any publicly traded firms, which are always classified as Public Investment Firms.
Financial Service Investment Arm	Principal investment firm that is majority-owned by a financial services company, such as a bank. Includes all firms making direct private equity investments and all private equity fund-of-funds that are over 50% owned by a financial services company. Does NOT include any other investment firm type, such as hedge fund sponsors, mutual funds or pension funds. Does NOT include firms whose parent company is also an investment firm; these companies are classified as Private Investment Firms, and they are linked to the parent company

	as an Operating Subsidiary.
Private Fund	(AKA Special Purpose Issuer Trust): A fund that is private and managed by an investment firm. Includes structured finance instruments such as asset backed securities and mortgage pass through certificates.
Fund Family	A fund family is the historical succession of funds focused on the same investment strategy. Each fund's success leads to the investment firm's ability to raise more capital for its subsequent funds. When the investment firm creates a fund with a completely new investment strategy, it will also create a new fund family.
Public Fund	Includes ETFs and Mutual Funds as they are tracked as public funds. The majority of these funds have IDC securities that have pricing coming in from IDC.
Educational Institution	Any for-profit or non-profit educational entity, such as universities, schools, colleges, junior colleges, technical institutes, and vocational schools. Does NOT include school boards, school districts, and school divisions which are government institutions, or institutions offering test or exam preparation services, or professional and language training institutes, which are private companies.
Arts Institution	Arts-related entities, such as symphonies, museums, art galleries, and libraries. Related organizations and affiliated endowments are NOT included as Arts Institutions. These are classified as Investment Firms with Endowment Fund Sponsorship as their Investment Type. These firms are linked to their parent.
Labor Union	Includes all unions. Unions are groups who protect laborers and preserve their labor rights. Credit unions are not labor unions; these are classified as Private Companies.
Government Institution	Includes all government-owned agencies or government-run institutions, such as state and country governments, school districts and boards, library districts, workers compensation boards, power and water districts, and military agencies.
Religious Institution	Any religious entity such as churches and temples.
Trade Association	All associations dedicated to a particular trade. Many fields have associations that offer forums for information, as well as accreditations. Fields, such as engineering, medicine, and accounting, have associations dedicated to their particular trade, including Bar Associations. Does NOT include Credit unions and associations related to religion or ethnicity or charitable endeavors.

Foundation / Charitable Institution	Any non-profit organization focused on general philanthropic or social causes. These organizations typically donate funds or provide support to other social organizations, or provide the source of funding for its own charitable purposes. Foundation/Charitable Institutions is a general term and includes public charities (aka charitable foundations, public foundations, or foundations) and private foundations.

Announced/Completed Transactions

Buyback - Change in Plan Terms	When the company announces changes to its plan terms (e.g., increases/decreases the plan term number of shares and/or monetary value and/or plan term percent of shares) and/or changes in duration of the plan (extension/shorten).
Bankruptcy - Conclusion	The key event is auto-generated from the bankruptcies transaction page when the bankruptcy petition of a company in bankruptcy is either dismissed or the company goes out of business as part of the bankruptcy process. This event is also created when the transaction of a company is consolidated into another bankruptcy transaction (of any of its related entity).
Bankruptcy - Emergence/Exit	This key development is auto-generated from the bankruptcies transaction screens when a company emerges out of bankruptcy.
Bankruptcy - Filing	This key development is auto-generated from the Bankruptcies transaction page when a company files to reorganize or liquidate under the Federal Court's supervision.
Buyback Tranche Update	In a buyback transaction, the company plans to repurchase a certain amount of its own shares. Typically, the company does not repurchase all the planned shares at the same time; they do it in many operations until they complete the plans. (There are some buybacks transaction that last 4-5 years and beyond). The company discloses the repurchase information either for a quarter/half year/annual or for random periods falling between the duration of the buyback plan. This repurchases information (i.e. how much actually the company has bought back during a particular period (within the entire duration of the plan) is what S&P Global Market Intelligence calls tranches. The Buyback Tranche Update is created when the new tranche repurchased data is created in the transaction. Tranches are created for a minimum of three months except in those cases where the plan is concluded within

	three months or when a quarter lasts fewer than three months.
Buyback Transaction Announcements	Under the Board authorized plans buyback transactions are announced when Board of Directors authorizes a new program to repurchase company's own equity shares. Buyback plans that are mandated through a Shareholder's meeting (Annual/Extraordinary/ Ordinary General Meeting) are shareholders authorized plan. Such buyback transactions are announced from the date of first repurchase under the shareholders authorization program. The only exception to this is when tender offer has been approved by the shareholders. Announcement of such plans are made from the date of mandated given by the shareholders.
Buyback Transaction Cancellations	When a company cancels or forfeits its earlier announced plans to buy back its equity and has not made any repurchases in the plan.
Buyback Transaction Closings	When the company concludes the repurchase program. This key development is created when any of the plan terms have been met, if the duration of the plan has expired, or the date on which the company has suspended the repurchases under the plan.
Composite Units Offerings	A composite unit is an instrument that derives its value from two or more securities underlying it. These Units are transferable and trade like any other security with the holder of the Unit at times having the option to split the Unit in its underlying components and sell them separately.
Debt Financing Related	Announcements that a company is raising money through private placement of debentures, bonds, notes, or mortgages or borrowing directly from financial institutions.
Derivative/Other Instrument Offerings	The public offering of commodities, bonds, equities, currencies, futures, or options by an underwriter for a company.
Fixed Income Offerings	Public Offering of debentures, bonds, and notes by a private or public company.

Follow-on Equity Offerings	An offering of additional shares of equity to the public by a company following the company's initial public offering (IPO).
IPOs	Initial Public Offering: The first sale of stock to the public by a company.
M&A Transaction Announcements	Merger & Acquisition Transactions Announcements: The announcement of the combining of two or more entities into one through a purchase acquisition.
M&A Transaction Cancellations	Merger & Acquisition Transaction Cancellation: The cancellation of an announced transaction between two or more entities seeking to combine into one through a purchase acquisition.
M&A Transaction Closings	Merger & Acquisition Transaction Closings: The finalized transaction which legally outlines the terms of the combination of two or more entities into one through a purchase acquisition.
Private Placements	Announcements of sales of securities directly to institutional investors, such as banks, mutual funds, insurance companies, pension funds, foundations, etc.
Public Offering Lead Underwriter Change	Lead or Co-lead underwriter of a Public Offering is changed after the initial announcement.
Spin-Off/Split-Off	Corporate events pertaining to a Spin-Off/Split-Off transaction. Also, announcements related to closing or cancellation of a Spin-off/Split-off transaction.
Structured Products Offerings	Public offering of Mortgage-Backed (MBS) and Asset-Backed Securities (ABS).

Bankruptcy Updates

Bankruptcy - Conclusion	The key event is auto-generated from the bankruptcies transaction page when the bankruptcy petition of a company in bankruptcy is either dismissed or the company goes out of business as part of the bankruptcy process. This event is also created when the transaction of a company is consolidated into another bankruptcy transaction (of any of its related entity).
Bankruptcy - Emergence/Exit	This key development is auto-generated from the bankruptcies transaction screens when a company emerges out of bankruptcy.
Bankruptcy Filing	This key development is auto-generated from the Bankruptcies transaction page when a company files to reorganize or liquidate under the Federal Court's supervision.
Bankruptcy - Other	This event is auto-generated from the bankruptcies transaction page when a company under bankruptcy files any motion other than the plan, motion for sale or motion for financing. This also includes motions either approved or rejected by the Court or a rumor regarding a potential bankruptcy filing.
Bankruptcy - Asset Sale/Liquidation	The event is auto-generated from the bankruptcies transaction page when a company in bankruptcy either files a liquidation plan or seeks approval for the sale of its assets in the Court. This event is also created when these motions are either approved or rejected by the Court or any modifications to them are filed by the company.
Bankruptcy - Financing	The event is auto-generated from the bankruptcies transaction page when a company in bankruptcy is granted Debtor-in-possession financing or exit financing, or any amendment to these financing terms and are approved by a Court.
Bankruptcy - Reorganization	This key event is auto-generated from the bankruptcies transaction page when a plan of reorganization or any amendment to it is filed by a company in bankruptcy. This key event is also generated when such plan are either approved or rejected by the US Bankruptcy Court.

Company Forecasts and Ratings

Corporate Guidance - Lowered	An announcement that a company expects operating results to be lower than its previously announced expectations.

Corporate Guidance-New/Confirmed	An announcement that a company's expected earnings results or announcements that the company remains confident of the previously announced earnings results.
Corporate Guidance-Raised	An announcement that a company expects earnings results to be higher than its previously announced expectations.

Corporate Structure Related

Address Changes	An announcement that a company's headquarters is moving or has recently moved from one location to another.
Board Meeting	An announcement of the date and agenda of a meeting of a company's board of directors.
Business Reorganizations	An announcement that a company is combining or separating organizational units. Does not cover closure of a unit or facility (see Discontinued Operations/Downsizing) or opening of a new unit of facility (see Business Expansion). The reorganization of a division, management, or operations of a company or corporation for efficiency or cost saving purposes. This may increase the earnings of the company.
Changes in Company Bylaws/Rules	A revision of or a plan to revise the official rules and regulations which govern a corporation's management, which includes changes/ amendments to its Bylaws/Articles of Incorporation.
Executive Changes - CEO	An announcement of the change in executive level CEO position/Co-CEO/additional CEO/Temporary CEO/Joint CEO within a firm, change includes new appointment/ resignation/ retirement/ termination/ demise/ rejoining etc.
Executive Changes - CFO	An announcement of the change in executive level CFO/ Co-CFO/additional CFO/Temporary CFO/ Joint CFO Position within a firm, change includes new appointment/ resignation/ retirement/ termination/ demise/ rejoining etc.
Executive/Board Changes - Other	An announcement of either a change in the membership of an elected member of the board of directors or changes in executive level positions within a firm (excludes CEO & CFO Changes). Executive levels other than CEO& CFO include Chairman, President, Chief Technical Officer (CTO), Chief Operating Officer (COO), Chief Compliance Officer (CCO) etc. Change includes new appointment/ resignation/ retirement/ termination/ demise/ rejoining etc.

Fiscal Year End Changes	An announcement that a company changes/ redefines the end of its annual reporting period.
Legal Structure Changes	An announcement that a company changes the legal structure of the business. Changes include changing to a Public Company, changing to a Private Company, changing to Limited Liability Company, Changing from Open Joint-Stock Company to Joint-Stock Company etc.
Name Changes	An announcement that a company changes or plans to change its name.

Customer/Product Related

Business Expansions	The growth of a company, usually by means of increasing their current operations through internal growth, like entering into new markets with existing product, opening a new branch, establishing a new division, increasing production capacity, investing additional capital in the current business. Growth by acquisition is not covered in this type.
Client Announcements	An announcement of the beginning, ending or change in a relationships between a corporation and their clients or potential future clients.
Product Related Announcements	Announcements pertaining to the introduction, change, improvement, or discontinuation of a company's product or services. This includes all announcements from the research to final launch of the product and any enhancements to the product after launching along with announcements related to product recalls. This covers introducing/announcing/unveiling a new product/service/software/solution/platform and technology along with new product line, new models, brands, and new versions of its products or services. This event covers announcements related getting permission/receiving patent rights for releasing new product into the market. For Pharma industry each stage of the new product trails will be covered. For Drilling/Exploration industry when the company releases study results, commences drilling, releases drilling results.
Strategic Alliances	An agreement between two or more entities stating that the involved parties will collaborate in some way to achieve a common goal. This also includes discussions when the two or more companies intend to form an alliance. Collaboration may include forming an alliance to develop a new product; conduct research activities together; integrate their products or services or technology into new solution or as joint solution; forming an alliance to start a new company; entering into joint venture agreement; extend / terminate their previously announced strategic alliance / research collaboration agreement; airline company enters into code sharing agreements.

Dividends/Splits

Dividend Affirmations	When a company reiterates a previous dividend announcement or announces that they will continue to pay the same dividend that they have paid in the past. This only includes dividends paid in cash.
Dividend Cancellation	When a company cancels an already announced dividend or suspends or omits to pay a dividend.
Dividend Decreases	When a company either announces that they will be paying a dividend that is lower than was previously announced or announces that they will pay a lower dividend than they have paid in the past. It only includes dividends paid in cash.
Dividend Increases	When a company announces that they will be paying a dividend that is higher than was previously announced, announces that they will pay a higher dividend than they have paid in the past or announces that they will begin paying a regular divided. (Declarations of non-periodic dividend payments are covered under "Special Dividend Announced" defined below.) This only includes dividends paid in cash.
Dividend Initiation	When a company announces its maiden dividend or reinitiates dividend payment after a long gap.
Ex-Div date (Regular)	The first day of the ex-dividend period for a periodically recurring dividend. An investor who does not own the stock before this date will not be eligible to receive the dividend.
Ex-Div Date (Special)	The first day of the ex-dividend period for a non-periodic dividend. An investor who does not own the stock before this date will not be eligible to receive the dividend.
Preferred Dividend	When a company announces dividend payments on preferential shares. This only includes dividends paid in cash.
Special Dividend Announced	An announcement of a non-recurring distribution of company assets, usually in the form of cash to shareholders.
Stock Dividend (<5%)	A dividend payment made in the form of additional shares rather than a cash payout whose value is less than 5% of the value of the shares held. Stock dividends greater than 5% are considered "Stock Splits & Significant Stock Dividends".
Stock Splits & Significant Stock Dividends	When a company increases the number of outstanding shares of its stock but the proportionate equity of each shareholder remains the same.

Investor Activism

Investor Activism - Activist Communication	Any type of communication from the Activist (firm/person) to a Target firm or Shareholders of the Target on activism agendas. Usually communication is made through SEC filings, letters/emails, press releases, power point presentations etc.
Investor Activism - Agreement Related	Any agreements entered into between Activist and Target related to a campaign. These include Settlement Offers either by Target/Activist, Settlement agreements, Standstill agreements, Confidentiality agreements, or any other disclosure which denotes information suggesting a settlement between the two firms.
Investor Activism - Financing Option from Activist	When an Activist offers financing to Target or Target lenders during a campaign and/or with an activism agenda.
Investor Activism - Nomination Related	Disclosure of nomination related information either by the Target or Activist. These include intent/notice of nominations to the Board by Activist, responses of Target on Activist nominations, and withdrawal of nominations by Activist.
Investor Activism - Proposal Related	All shareholder proposal related information, including proposals made or withdrawn by Activist, and responses of Target on the proposals made by Activist.
Investor Activism - Proxy/Voting Related	Covering Proxy fight related information, including solicitation of proxies by Activist and/or Target during a campaign, and Declaration of voting results by Target firm.
Investor Activism - Supporting Statements	Including the statements issued by Independent Proxy Advisors, and supporting statements made by a third party on Activist/Target during a campaign.
Investor Activism - Target Communication	All communications from the Target firm to Activist or Shareholders of the Target on activism agendas. Usually communication is made through SEC filings, letters/emails, press releases, power point presentations etc.

Listing/Trading Related

Delisting	An announcement that a company's common stock either has been or is scheduled to be removed from its primary exchange. Both voluntary (e.g. SEC Form 15 filers) and involuntary (i.e. companies that have received non-compliance notices from their respective stock exchanges).
End of Lock-up Period	The end of a period of time which an investment may not be sold. In conjunction with a Public Offering, a company and its underwriter typically enter into a lockup agreement to ensure that shares owned by these insiders do not enter the public market too early after the offering.
Exchange Changes	When a company moves from one primary stock exchange to another.
Index Constituent Adds	An announcement that a company has been added to a stock index.
Index Constituent Drops	An announcement that a company has been removed from a stock index.
IPOs	Initial Public Offering: The first sale of stock to the public by a company.
Ticker Changes	When a public company changes its stock ticker to a different ticker in its primary stock exchange, or when an exchange forces a change due to a delisting or other action.

Potential Red Flags/Distress Indicators

Auditor Changes	Announcements related to change of external auditor in a firm.
Auditor Going Concern Doubts	When an auditor for a company has doubts about the accounting statement of their client company's reaffirmation that it will continue to stay in business.
Bankruptcy - Filing	This key development is auto-generated from the Bankruptcies transaction page when a company files to reorganize or liquidate under the Federal Court's supervision.
Business Reorganizations	The reorganization of a division, management, or operations of a company or corporation for efficiency or cost saving purposes. This may increase the earnings of the company.
Debt Defaults	Usually companies borrow money, based on some standard and agreed repayment schedule. Sometimes debt providers demand companies repay

	the debt before scheduled maturity dates in situations where the company fails to perform its obligations under the Indenture. This pertains to these situations which are cause for the accelerated debt payment. These kinds of situations may lead a company to a cash crunch and may also lead to a change in the company's debt structure.
Delayed Earnings Announcements	When a company postpones the release of earnings results/operating results to the public.
Delayed SEC Filings	When a company does not file appropriate corporate documents or filings with the SEC by the appropriate deadline.
Delistings	An announcement that a company's common stock has been or is scheduled to be removed from its primary exchange. Both voluntary delistings, such as SEC Form 15 filers, and involuntary delistings, such as companies that have received non-compliance notices from their respective stock exchanges, are covered under this event type. This key development is only processed for companies that have not been delisted because of an M&A transaction. Common stock and ADR's & GDR's are processed and no other form of listed security is considered for making this key development. Once the company regains compliance this key development is also included in Delistings.
Discontinued Operations/Downsizings	Announcements pertaining to phasing out of a product line, closing of an individual facility (e.g. a plant, branch, division or subsidiary) or a reduction in the work force of a company.
Halt/Resume of Operations - Unusual Events	Announcements pertaining to halt or resume of operations due to unusual events like natural calamities, fire etc.
Impairment/Write Offs	A reduction in the value of an asset or earnings by the amount of an expense or loss. This is usually reduced as a result of poorly estimated losses or gains. Generally companies write off their assets to ensure that their assets are not overstated in the company's financial statements. Whenever a company recognizes an impairment loss, there will be a change in the assets of the company, and will also affect the earnings of the company.
Investor Activism - Activist Communication	Any type of communication from the Activist (firm/person) to a Target firm or Shareholders of the Target on activism agendas. Usually communication is made through SEC filings, letters/emails, press releases, PowerPoint presentations, etc.
Labor-Related	Announcements pertaining to the labor force of a particular company,

Announcements	including changes in agreements between a company and its employees' union and when a company enters into an agreement with the US Labor Department in respect to workers contract. This also covers announcements related to company's labor/trade union calls/warns/ends a strike against company.
Lawsuits & Legal Issues	This pertains to actions or suits brought before a court against a company, as to recover a right or redress a grievance. This covers lawsuit is filed against the company, updates on the on-going hearings, court delivers verdict against/ in favor of company in a lawsuit, company settles disputes with other parties and court / legal authority seeks additional information from the company.
Regulatory Agency Inquiries	Includes announcements that the Securities and Exchange Commission (SEC)/ Securities regulatory agencies in respective countries launching an inquiry into a company or Securities regulatory agencies files lawsuit against company or Company announces settlement / termination of Securities regulatory agencies investigation, or Securities regulatory agencies seek information from a company. This also covers change in accounting policy of a company or a change in the auditor of a company.
Regulatory Authority - Compliance	Announcements such as approvals, licenses, permissions, certification, objections, challenges etc. from federal regulators or government agencies that influence companies or industry.
Regulatory Authority - Enforcement Actions	Announcements such as complaints, fines, penalties, investigations etc. from federal regulators or government agencies that influence companies or industry. This also covers events talking about enforcement actions by Regulatory Authority against companies or events talking about investigations against company initiated by Regulatory Authority.
Restatements of Operating Results	Pertinent to whenever there is a revision to a company's earlier financial statements. The need for restating financial figures can result from fraud, misrepresentation, change of accounting policy or a simple clerical error.

Potential Transactions

Considering Multiple Strategic Alternatives	When a company is evaluating a range of alternatives/options/measures to enhance shareholder value which may include, sale, IPO, mergers and acquisitions, joint ventures, partnerships, strategic alliances, financing, recapitalization, share buybacks etc. This is important to strategic/financial buyers and investment/consulting firms that are interested in finding new investment possibilities or clients as the case maybe.

M&A (Merger & Acquisition) Rumors and Discussions	Pertinent to rumors/confirmed announcements for potential or initial talks for a merger, acquisition, and stake sale involving company(s) before any actual agreement is signed between the target(s) and buyer(s). This development also includes denials pertaining to merger/acquisition/sale talks amongst the concerned companies.
Potential Buybacks	Pertinent to speculations or intentions of a company to announce a buyback plan or where a company is seeking shareholder's approval through Annual General Meeting, Extraordinary General Meetings etc. to launch a Buyback plan.
Potential Privatization of Government Entities	Announcements that pertain to the potential conversion of ownership in a government/state-controlled entity to private or public ownership through the means of share sale, auction, tender offer, etc.
Seeking Acquisitions / Investments	This development is used when a company seeks to acquire or purchase a majority or minority interest in other companies/assets/divisions/ subsidiaries/brands/products etc. Also, this development is used when a company is looking at specific markets/sectors, where it already does not operate, for investment purposes.
Seeking Financing/Partners	When a company seeks equity funding/venture capital for general corporate purposes. The development is also used when a company is looking for joint ventures, partnerships, and strategic alliances. This may also include companies looking at the possibility of raising funds through an Initial Public Offering before the appointment of advisors/underwriters/lead managers and prior to the filing of the prospectus.
Seeking to Sell/Divest	This development is used in cases where a company is looking for a complete or a partial sell-off or a spin-off of its assets, divisions, subsidiaries, brands, properties etc. The development is also used when a company is looking at divesting its stake in another company. The companies, which have denied/withdrawn from a potential sale/spin off are also included in this key development.
Shelf Registration Filings	A term used for the SEC rule 415, which allows a corporation the ability to comply with registration requirements up to 2 years before making a public offering. The corporation must still file the required annual and quarterly reports to the SEC.

Results Announcements/Corporate Communications

Analyst/Investor Day	This pertains to events conducted for Analyst/Investor to update issues related to company.
Announcement of Interim Management Statement	Announcements of periodic Interim Management Statement.
Announcement of Operating Results	Announcements of quarterly, annual, or other periodic operating results.
Announcements of Earnings	Announcements of quarterly, annual, or other periodic earnings.
Announcements of Sales/Trading Statement	Announcements of results exclusively for reporting sales/revenue/turnover results for a particular period.
Annual General Meeting	The Annual General Meeting of a company is usually held at the end of each fiscal year, at which time the previous year and the outlook for the future are discussed, and directors are elected by common shareholders. Shortly before each annual meeting, the corporation sends out a document called a proxy statement to each shareholder.
Company Conference Presentations	This pertains to when a company participates in a "Conference" conducted by third parties, to discuss any issues with its Shareholders \ Analysts \ Investors.
Conferences	Events hosted by investment companies where various companies participate to update analysts, shareholders, investors etc. regarding issues related to company.
Corporate Guidance - Unusual Events	An announcement that a company expects impact on operating results due to unusual events like natural calamities, fire etc.
Delayed Earnings Announcements	When a company postpones the release of its earnings to the public.
Delayed SEC Filings	When a company does not file appropriate corporate documents or filings

	with the SEC at the appropriate deadline.
Earnings Calls	This pertains to when a company conducts a "Conference Call" to discuss its quarterly, annual, or other periodic earnings results.
Earnings Release Date	This pertains to the future dates communicated by a company, when its Earnings Results will be announced.
Estimated Earnings Release Date (S&P Global Derived)	Estimated future dates of Earnings release. It is auto generated based on historical earnings announcements dates.
Fixed Income Calls	Quarterly, annual, and other periodic conference call conducted by the company to discuss updates/earnings results with its fixed income investors.
Guidance/Update Call	This pertains to when a company conducts a "Conference Call" to discuss its guidance/ expectations for the future periods or to update its shareholders / analysts / investors on its operations during a particular period.
Interim Management Statement Calls	A conference call conducted by the company to discuss its periodic interim management statement.
Interim Management Statement Release Date	Scheduled release date of periodic Interim Management Statement.
M&A (Merger & Acquisition) Call	This pertains to when a company conducts a "Conference Call" to discuss or to update its shareholders/ analysts/ investors on Mergers and Acquisitions related issues.
Operating Results Calls	A conference call conducted by the company to discuss its quarterly, annual, or other periodic operating results (other than earnings results).
Operating Results Release Date	Scheduled release date of company's quarterly, annual, or other periodic operating results (other than earnings results).
Preferred Stock Buybacks	Repurchase of outstanding Preferred shares by a company in order to reduce the number of preferred shares in the market. Companies buyback preferred

	shares to increase the value of shares (reducing supply), or to reduce recurring fixed dividend payment burden.
Regulatory Authority - Regulations	Announcements related to rules, regulations, guidelines, policy statements etc. from federal regulators or government agencies that influence companies or industry.
Restatements of Operating Results	The restatement of a company's announcement of operating results due to needs for a correction or change in the initial announcement. This pertains to whenever there is a revision in a company's earlier financial statements. The need for restating financial figures can result from fraud, misrepresentation, change of accounting policy or a simple clerical error.
S&P Events	This pertains to events conducted by Standard & Poor's.
Sales/Trading Statement Calls	Includes all Conference Calls regarding sales, trading, or other results except earnings results.
Sales/Trading Statement Release Date	Future dates when Sales, Trading, or other operating results will be released.
Shareholder/ Analyst Calls	This pertains to when a company conducts a "Conference Call" to update its shareholders and analysts on any special issues related to the company other than earnings and expectations. This also pertains to when a Company announces Webcast of its AGM.
Special Calls	This pertains to when a company conducts a "Conference Call" to discuss any special issues (product launches, Joint ventures, expansions, strategic alliances etc.).
Special/ Extraordinary Shareholders Meeting	A meeting other than the annual general meeting between a company's shareholders, executives and any other members. An EGM is usually called on short notice and deals with an urgent matter. As an EGM usually deals with matters which are urgent and need to be discussed before the next annual general meeting and requires approval of shareholders.

Financial Data Item Definitions

Below is a list of definitions for financial data items. Please note that not all items appear in the S&P Global Market Intelligence for Salesforce application.

Type	Definition
Fiscal Period Ending	The completion of a one-year, or 12-month, accounting period.
Filing Date	Filing Date - Income Statement represents the filing date of a reported financial statement. For calculated financial periods such as LTM or Q4 the filing date of the latest component period becomes the filing date for the entire calculated period. In certain cases where the filing date of a source document is not available Market Intelligence makes the following assumptions about the document's filing date: Press release documents - reported period end date + 15 days Interim and quarterly non-press release documents - reported period end date + 30 days Annual non-press release documents - reported period end date + 60 days
Currency	Reflects the reported currency for the company.
Revenue	Revenues is a line item in the Standard template with the following components: Accident and Health Premiums Earned Asset Management Fee Brokerage Commission Credit Card Fee Commission and Fees Income (Loss) on Equity Invest. (Income Block) - (Bank Template) Fees and Other Income Foreign Exchange Gain (Loss) - Income Gain (Loss) on Sale of Assets - (Revenue Block) Gain (Loss) On Sale Of Investments and Securities (Rev) Gain (Loss) on Sale of Loans - (Revenue Block) - (Bank Template) Other Premiums Earned Underwriting & Investment Banking Fee Interest and Dividend Income Corporate Segment Interest and Dividend Income Other than Corporate Segment Income (Loss) on Real Estate Held for Investment - Income Income (Loss) From Foreclosed Properties - (Rev) Life Insurance Premiums Earned Loan Servicing Revenue Mortgage Banking Activities Mortgage Banking

	Property Management Fee Non-Insurance Activities Revenues Non-Operating Income (Expenses) - (Income Block) - (Bank Template) Property & Casualty Premiums Earned Trading and Principal Transactions Tenant Reimbursements Rental Revenues Service Charges On Deposits Revenues - (Collected) Cargo Revenues Franchise Revenues Gain (Loss) on Sale of Loans & Receivables - (Revenue Block) - (Collected) Management Fee Passenger Revenues Product Revenues Research and Development Revenues Royalty Income - (Rev) Rental Revenues Service Revenues Income From Trading Activities Trust Income Deductions from Sales Insurance And Annuity Revenues Excise Taxes Excluded from Sales Other Non-Interest Income (Collected) This item excludes: Excise Taxes Included in Sales (Supple) Provision for Doubtful Accounts - Patient Service Revenue
Total Revenue	Total Revenues is subtotal line item in the Standard template with the following components: Revenues Other Revenues, (Summary Subtotal)
Gross Profit	Profit is a subtotal line item in the Standard template and is the (difference) between the following data items: Total Revenues - Cost of Revenues
Other Operating Exp., Total	Other Operating Expenses, Total is a subtotal line item in the Standard template with the following components: Selling General & Admin Expenses, Total Depreciation & Amortization, Total - (IS) R&D Expenses Other Operating Expenses
Net Income	Net Income - (IS) is a subtotal line item across all templates with the following components:

	Standard template: Earnings From Continuing Operations Earnings Of Discontinued Operations Extraordinary Item & Accounting Change (Standard template) Minority Interest in Earnings Non-Standard templates: Earnings From Continuing Operations Earnings Of Discontinued Operations Extraordinary Item & Accounting Change - (Template Specific) Minority Interest in Earnings
Basic EPS	Net EPS - Basic is a line item across all templates calculated using the following formula: Net Income to Common Incl Extra Items / Basic Weighted Average Shares Outstanding Note: 1. This item is adjusted for historical stock splits 2. For multiple class companies, per share items are primary class equivalent, and for foreign companies listed in Market Intelligence as primary ADRs, per share items are ADR-equivalent
Diluted Net EPS	Net EPS - Diluted is a line item across all templates calculated using the following formula: (Diluted Net Income + Earnings Of Discontinued Operations + Extraordinary Item & Accounting Change / Diluted Weighted Average Shares Outstanding Note: 1. This item is adjusted for historical stock splits 2. For multiple class companies, per share items are primary class equivalent, and for foreign companies listed in Market Intelligence as primary ADRs, per share items are ADR-equivalent
EBITDA	EBITDA is the headline EBITDA number in Capital IQ. It is a line item in the Standard, Real Estate, Insurance and Utility templates with the following components: EBIT D&A for EBITDA
EBIT	The headline Market Intelligence EBIT number is equal to Operating Income
Total Assets	Total Assets is subtotal line item across all templates with the following components: Standard template: Total Current Assets Net Property, Plant & Equipment Long-term Investments Goodwill

	Other Intangibles, Total Finance Div. Loans and Leases, LT Finance Division Other Long-Term Assets, Total Other Assets, Total Banks template: Cash And Equivalents Total investments Net Loans Net Property, Plant & Equipment Goodwill Other Intangibles, Total - (Template Specific) Investment in FHLB Other Assets, Total - (Template Specific) Capital Markets template: Cash And Equivalents Cash & Securities Segregated Securities Owned Securities Purch. Under Agreem. To Resell Securities Borrowed Accounts Receivable, (Summary Subtotal) - (Template Specific) Net Property, Plant & Equipment Goodwill Other Intangibles, Total - (Template Specific) Other Assets, Total - (Template Specific) Financial Services template: Cash And Equivalents Long-Term Investments - (FS Template) Trading Asset Securities Loans and Lease Receivables - (FS Template) Other Receivables Net Property, Plant & Equipment Goodwill Other Intangibles, Total - (Template Specific) Other Assets, Total - (Template Specific) Insurance template: Total investments Cash And Equivalents Reinsurance Recoverable - (IS) Deferred Policy Acq. Costs Separate Account Assets Other Receivables - (Insurance Template) Net Property, Plant & Equipment Goodwill Other Intangibles, Total - (Template Specific) Other Assets, Total - (Template Specific)

	Real Estate: Total Real Estate Assets Cash And Equivalents Accounts Receivable, (Summary Subtotal) - (Template Specific) Invest. in Debt and Equity Securities Goodwill Other Intangibles, Total - (Template Specific) Other Assets, Total - (Template Specific) Utility template: Total Current Assets Net Property, Plant & Equipment Net Nuclear Fuel Regulatory Assets Goodwill Other Intangibles, Total - (Template Specific) Other Assets, Total - (Template Specific)
Total Cash and ST Investments	Total Cash And Short Term Investments is a subtotal line item in the Standard template with the following components: Cash And Equivalents Short Term Investments Trading Asset Securities
Total Current Assets	Total Current Assets is subtotal line item in the Standard and Utility templates with the following components: Standard template: Total Cash & ST Investments Total Receivables Inventory Prepaid Exp. Finance Div. Loans and Leases, ST Finance Division Other Current Assets, Total Other Current Assets, (Summary Subtotal) Utility template: Cash And Equivalents Short Term Investments - (Utility Template) Trading Asset Securities Accounts Receivable, (Summary Subtotal) - (Template Specific) Inventory - (Utility Template) Prepaid Exp. Other Current Assets, (Summary Subtotal) - (Template Specific)

Net Property, Plant and Equipment	Net Property Plant And Equipment is a subtotal line item across all templates (excl. Real Estate) with the following components: Gross Property Plant And Equipment Accumulated Depreciation Note: In the cases where a breakdown of Net Property Plant and Equipment into Gross PP&E and Accumulated Depreciation is not reported, Net PP&E data is collected directly into Net Property Plant And Equipment
Total Liabilities	Total Liabilities - (Standard / Utility Template) is a subtotal line item in the Standard and Utility templates with the following components: Standard template: Total Current Liabilities Long-Term Debt Capital Leases Finance Division Debt Non-Current Finance Division Other Non-Current Liabilities, Total Other Liabilities, Total Utility template: Total Current Liabilities Long-Term Debt - (Template Specific) Capital Leases Trust Preferred Securities (BS) Other Liabilities, Total - (Template Specific)
Total Current Liabilities	Total Current Liabilities is a subtotal line item in the Standard and Utility templates with the following components: Standard template: Accounts Payable, Total Accrued Expenses, Total Short-term Borrowings Current Portion of Long Term Debt/Capital Leases Finance Division Debt Current Finance Division Other Current Liabilities, Total Other Current Liabilities, Total Utility template: Accounts Payable, Total - (Template Specific) Accrued Expenses, Total - (Template Specific) Short-Term Borrowings - (Template Specific) Finance Division Other Current Liabilities, Total Other Current Liabilities, Total - (Utility Template) Current Portion of Long-Term Debt / Capital Leases - (Template Specific)

Tangible Book Value	Tangible Book Value represents book value of common equity, net of goodwill and intangible assets Total Common Equity - Goodwill - Other Intangibles, Total - Finance Division Goodwill - Finance Division Goodwill and Intangible Assets - Finance Division Intangibles Insurance template - components excluded: Deferred Policy Acquisition Costs - (BS)
Total Preferred Equity	Total Preferred Equity is a subtotal line item across all templates with the following components: Standard template: Preferred Stock Redeemable Preferred Stock Non-Redeemable Preferred Stock Convertible Preferred Stock - Others Non-standard templates: Preferred Stock Redeemable Preferred Stock Non-Redeemable Preferred Stock Convertible Preferred Stock - Others - (Template Specific)
Total Common Equity	Total Common Equity is a subtotal line item across all templates with the following components: Common Stock & APIC Retained Earnings Treasury Stock & Other Non-Standard Templates: Common Stock & APIC - (Template Specific) Retained Earnings Treasury Stock & Other - (Template Specific) Real Estate template - additional component: Distributions in excess of earnings
Total Equity	Total Equity is a subtotal line item across all templates with the following components: Total Preferred Equity Total Common Equity

	Total Minority Interest
Cash from Ops	Cash From Operations is a subtotal line item across all templates with the following components: Standard template: Net Income Depreciation and Amortization, Total Amortization of Deferred Charges, Total - (CF) Other Non-Cash Items, Total Change in Net Operating Assets Non-standard templates: Net Income Depreciation and Amortization, Total Amortization of Deferred Charges, Total - (Template Specific) Other Operating Activities, Total (Template Specific)
Capital Expenditure	Capital Expenditure is a line item in the Standard template that represents cash outflows towards purchase of plant, property and equipment by the company and has the following components: Capital Expenditure - (Template Specific) Nuclear Fuel Expenditures This item excludes: Purchase/ sale of real estate properties Purchase/ sale of intangible assets like licenses, patents, trademarks etc. Purchase/ sale of investments Sale of property, plant and equipment Additions to deferred charges Cash restricted for capital expenditure
Cash From Financing	Cash from Financing is a subtotal line item across all templates with the following components: Standard template: Total Debt Issued Total Debt Repaid Issuance of Common Stock Repurchase of Common Stock Issuance of Preferred Stock Repurchase of Preferred Stock Total Dividends Paid Other Financing Activities, (Summary Subtotal)

	Non-standard templates: Total Debt Issued - (Template Specific) Total Debt Repaid - (Template Specific) Issuance of Common Stock - (Template Specific) Repurchase of Common Stock - (Template Specific) Issuance of Preferred Stock - (Template Specific) Repurchase of Preferred Stock - (Template Specific) Total Dividends Paid Other Financing Activities, (Summary Subtotal) - (Template Specific)
Cash From Investing	Cash From Investing is a subtotal line item across all templates with the following components: Standard template: Capital Expenditure Sale of Property, Plant, and Equipment Cash Acquisitions Divestitures Other Investing Activities, (Summary Subtotal) Non-standard templates: Capital Expenditure Sale of Property, Plant and Equipment Cash Acquisitions Divestitures Other Investing Activities, (Summary Subtotal) - (Template Specific) Real Estate template - additional components: Acquisition of Real Estate Assets, Total Sale of Real Estate Assets, Total Net Sale / Acquisition of Real Estate Assets Purchase / Sale of Intangible Assets - (Template Specific) Real Estate template - components excluded: Capital Expenditure Sale of Property, Plant and Equipment
Levered Free Cash Flow	Levered Free Cash Flow is a supplemental line item in the Standard, Insurance, Utility and Real Estate templates with the following components: EBIT * (1 - Tax Statutory Rate) + Interest Expense, Total) * (1 - Tax Statutory Rate) + Depreciation & Amortization, Total - CF + Amortization of Deferred Charges, Total - (CF)

	+ Capital Expenditure + Sale (Purchase) of Intangible Assets + Total Stock-Based Compensation - Change In Net Working Capital Notes: 1. Market Intelligence assumes statutory tax rate of 37.5% for all companies 2. All components of Levered Free Cash Flow are stored and used as inputs with a positive sign indicating profit or a cash inflow and with a negative sign to indicate a loss or a cash outflow
Unlevered Free Cash Flow	Unlevered Free Cash Flow is a supplemental line item in the Standard, Insurance, Utility and Real Estate templates with the following components: EBIT * (1 - Tax Statutory Rate) + Depreciation & Amortization, Total - CF + Amortization of Deferred Charges, Total - (CF) + Capital Expenditure + Sale (Purchase) of Intangible Assets + Total Stock-Based Compensation - Amortization of Debt Issuance Costs - (CF) - Change In Net Working Capital Notes: 1. Market Intelligence assumes statutory tax rate of 37.5% for all companies 2. All components of Unlevered Free Cash Flow are stored and used as inputs with a positive sign indicating profit or a cash inflow and with a negative sign to indicate a loss or a cash outflow
Return on Assets	(EBIT * 0.625) / ((Total Assets (t) + Total Assets (t-1)) / 2) Notes: (1) If both periods of data (t and t-1) are not available then the ratio will be shown as NM (2) If the denominator is less than or equal to zero then the ratio will be shown as NM
Return on Capital	(EBIT * 0.625) / ((Total Capital (t) + (Total Capital)(t-1)) / 2) Notes: (1) If both periods of data (t and t-1) are not available then the ratio will be shown as NM (2) If the denominator is less than or equal to zero then the ratio will be shown as NM

Return on Equity	Earnings From Continuing Operations / ((Total Equity (t) + Total Equity (t-1)) / 2) Notes: (1) If both periods of data (t and t-1) are not available then the ratio will be shown as NM (2) If the denominator is less than or equal to zero then the ratio will be shown as NM

Market Data

As-of	The date as of which the market data items are true.
Ticker	An abbreviation used to uniquely identify publicly traded shares of a particular stock or security on a particular stock exchange.
Exchange	The primary stock exchange where securities are traded.
Price Open	Price of the trading item at market open.
Price High	Highest price of the trading item during the market day.
Price Low	Lowest price of the trading item during the market day.
Price Close	Price of the trading item at market close.
Market Capitalization	Market capitalization figure, given in millions of the currency of the primary trading item. This figure is calculated using Common Stock.
Total Enterprise Value	Total Enterprise Value, in millions of the currency of the primary trading item.
VWAP	Volume Weighted Average Price: the average price throughout the day, adjusted for volume of shares traded.
Volume	Volume of shares traded during the trading day.
Shares Outstanding	Number of shares outstanding for the trading item

Topic Tags

Topic Tags are niche industry classifications with insights into a company's operations than the typical S&P Market Intelligence and S&P Capital IQ/GICS® industry classification provide. Currently, 300+ Topic Tags are available on the S&P Capital IQ Pro platform, relating to 2 million+ private and public companies.

Topic Tags data can help you:

- Generate ideas for business development workflows
- Identify trends and investable companies in niche industries
- Filter transactions and PE investments using Topic Tags
- Assess competitors, risks, acquisitions, etc.

In the Salesforce App, we have added the ability to screen companies based on Topic Tag themes, with the underlying Topic Tags available in the Company Profile view. We currently have 27 themes available, given in the table below.

Please Note: Themes will continue to evolve and is subject to change in the future. New themes will be added only when a package upgrade is available.

Theme	Theme Name
1	AgriEcosystems
2	Artificial Intelligence
3	Blockchain and Cryptocurrency
4	Cloud Solutions
5	Cybersecurity and Privacy Protection
6	Data and Analytics
7	Digital Finance
8	Digital Health Solutions
9	Education and Employment Technologies
10	Entertainment, Gaming, and Media
11	Environmental Solutions and Carbon Management
12	Health Support Services
13	Immersive and Interactive Technologies
14	Data Center and Networking Technologies
15	Integrated Mobility and Logistics Solutions
16	Lifestyle and Wellness
17	Manufacturing and Automation Technologies
18	Marketing Technology
19	Marketplace Platforms
20	Pet Products and Services
21	Renewable Energy Solutions
22	Shared Economy and Mobility Innovations
23	Software and Development Technologies
24	Sustainable Energy Technologies
25	Therapeutic Specialties
26	Travel and Hospitality
27	Urban Infrastructure and Technology

Revision History

The changes made to this document include the following:

V1.0	March 2014	Initial version
V1.1	November 2015	Reflects functionality changes in Version 1.80
V3.0	May 2017	Reflects functionality changes in Version 3.0
V3.6	July 2018	Reflects upgrade information for Version 3.6
V3.6, 3.7, 3.8	December 2018	Reflects features available on versions 3.6, 3.7, and 3.8
V3.9	December 2020	Reflects features available on version 3.9
V4.1	November 2021	Reflects features available on version 4.1
V4.4	January 2024	Reflects upgrade information for Version 4.4
V5.1	July 2024	Reflects upgrade information for Version 5.1 as per the new Lightning Web Components (LWC) changes.
V5.5	March 2025	Reflects data addition & introduction of Custom Field Mapping
V5.7	May 2025	Backend fixes to ensure smooth operations. No change in functionality
V5.8	August 2025	Minor UI updates. No change in functionality.
V6.0	June 2026	Reflects addition of Topic Tags, expanded company relationships coverage, and revamp of 'Relationships' tab.