## Step-by-Step: Screening a List of M&As with Capital IQ

**Description:** The following example demonstrates how to screen a list of closed M&A deals in the Information Technology industry in Canada during the last 12 months in Capital IQ.

1. Go to the <u>York University Libraries' homepage</u>, type **Capital IQ** into the Omni search bar, and click **Search**.

York University Libraries	
Library Home Ask & Services • Research & Learn • Collections	Locations and Spaces      About Us     CONTAC
Search Omni Catalogue	Library/Yorku Website Search
::::::::::::::::::::::::::::::::::::::	SEARCH
I Advanced Search   Research Guides   Library FAQ   Omn Using Library Licensed Content	i Guide   My.Account

2. **Capital IQ** should be the first result in your search results list. Click **Available Online** in the record.

libraries YORK



3. In the database record, scroll down to the View Online section. Click the Capital IQ link. You will be asked to enter your Passport York first, and then Sign In to Capital IQ using your Capital IQ login credentials. If you haven't done so already, please follow the instructions in the How to access Capital IQ at York link to set up your Capital IQ account.

View Online	
Full text availability	
Capital IQ Please see How to access Capital IQ at York for access instructions.	

4. In Capital IQ, hover the **Screening** tab from the top Navigation bar and select the **Transactions** link.

S&P Capital IQ Search Companies, People, Funds, and More						
My Capital IQ	Companies	Markets	Screening	Charting	Coverage	Proje
Screening	Idea	a Generatio	on	Repor	ting	
<ul> <li>Companies</li> <li>Quick Screen</li> <li>Equities</li> <li>Fixed Income</li> <li>Key Developr</li> <li>People</li> <li>Irransactions</li> <li>Projects</li> <li>Projects/Port</li> <li>Saved Screer</li> <li>Saved Templa</li> </ul>	er Inv er Inv PE/ Comments Scr Ner Cre All folios ns Targ ates Fin	Investment Banking Investment Management PE/VC Corporate Screening Lite New and Newsworthy Credit Ratings All Idea Generation Screens argeting Find Buyers or Investors		<ul> <li>Screet</li> <li>Compa</li> <li>Creat</li> <li>Creat</li> <li>Creat</li> </ul>	ening Reports arable Analy ie - Companie ie - Transacti ie - Fixed Inc	ysis es ons ome

5. On the **Transaction Screening** page, set the Screening Criteria as below:

a. Within the **M&A Details** group, select the **Dates** link.

M&A Details	
Dates Valuations Features Target Security Types Target Security Details Consideration Offered Consideration Details Deal Conditions	
Deal Responses Deal Attitude Deal Approach	

b. Select the **Announced Date** from the **M&A** list. Set the **Time Frame** as the **Last 12 Months**. Click the **Add Criteria** button to apply the criterion.

Sort by: All Transactions Announced Date	DESC V Views Top 10000	v	View Results =
Screening Criteria: Transaction Dates			-e X
All Transactions Announced Date Announced Date (Including Bids and Letters of Intent) Closed Date Cancelled Date Announced Date Announced Date Cancelled Date Cancelled Date Cancelled Date Cancelled Date Cancelled Date Cancel Date Cancel Date Cancel Date Definitive Agreement Date Closed Date	*	Time Count	
Orden 1 V Type: Rev OR AND	Automatically calculate results		Add Collevia

c. Within the General Transaction Details group, select the Status link.

General Transaction Details	
Dates Descriptions Pre-Deal/Post-Deal Comments Types Status Primary Features Valuations Advisors and Fees Related Transactions	

d. Select **Closed** in the **Available Items** list and click the **Right Arrow** to add it to the **Selected Items** list. Click the **Add Criteria** button to apply the criterion.

Screening Criteria: Transaction Status			<b>0</b> = x
Available Items:		Selected Items:	
Cancelled			-
Closed	>>		
Effective Emerged/Reorganized Expired			
Exclude results matching the above criteria.			
Order: 2 V Type: New OR AND ZAutomatically calculate	results		Add Criteria

e. Within the **Company Details** group, click the **Industry Classifications** link.

Company Details
Industry Classifications
Geographic Locations
State of Incorporation
Country/Region of Incorporation
Business Descriptions
Products
Company/Strategy Notes
Status
Ownership Status
Company Type
Company Statistics
Business Relationships
Most Recent Auditor
No. of Analysts
Analyst Coverage
Alpha Factor Library Factors

f. Check the **Information Technology** check box. Click the **Add Criteria** button to apply this criterion.



g. Within the **Company Details** group, click the **Geographical Locations** link.



h. Click the plus sign in front of **United States and Canada**, and check the **Canada** check box. Click the **Add Criteria** button to apply the criterion.

Screening Criteria: Geographic Locations	🜖 👄 X
City: (OR)	
Zq/Portal (DR)	
Search Geographic Locations: Search Clear Spottal Code Mapping	
Africa / Middle East	
🗉 🗌 Asia / Pacific	
B D Europe	
3 Latin America and Caribbean	
United States and Canada	
📧 🗹 Canada	
United States of America	
4	E.
Search by Headquarters Only	
DExclude results matching the above criteria.	
2 Relationship Options	
Order: 2 🗸 Type: 🐻Menv OR AND 🛃Automatically calculate results	Add Criteria

 All the added criteria are listed at the top of the Transaction Screening page. Click the View Results button to view the M&A deals that meet all the added screening criteria. The results can be exported to Excel.

Transaction Screening	
🛞 Sectings 🔚 Save as 📧 📧 📾 Add to - 0	
Screen For: Ocompanies Fixed Income Key Devs People Transactions Projects	
View Criteria Customize Display Columns Saved Screens Idea Generation	
Reorder Reserves	x O
1 M&A Announced Date: [Last 12 Months]	39567 Edit 🗙 Options 🔻
2 V Transaction Status: Closed	29718 Edit 🗙 Options 🔻
3 V Industry Classifications (Target/Issuer): Information Technology (Primary)	4318 Edit 🗙 Options 🔻
4 Geographic Locations (Target/Issuer): Canada (Primary)	164 Edit 🗙 Options 🔻
Search: Search or add data points and formulas	Add to Screen
Sort by: M&A Announced Date V DESC V View: All Results V of 164	View Results +>

- 7. Still need help? Go to the Ask Us page on the Libraries' website to access our:
  - chat service
  - email help
  - in-person research help hours
  - or to book an in-depth research consultation with a librarian.