Step-by-Step: How to Download Bloomberg Data into Excel

Instructions: Use this document to successfully download or copy data from the Bloomberg into Excel. The first four topics detail the most common ways to transfer data into Excel. The last topic covers common issues and how to fix them.

Note: Bloomberg's data license is very restrictive. Data downloaded from Bloomberg must remain on the same terminal from which it is accessed. It cannot be moved to your personal computer.

Step-by-Step: How to Download Bloomberg Data into Excel
- 1. Using 97) Export to Download Data
- 2. Using Export to Download Data
- 3. Using 97) Edit to Capture Graph Data
- 4. Using Drag & Drop to Copy Data to Excel
- 5. Issue: Excel Not Launching

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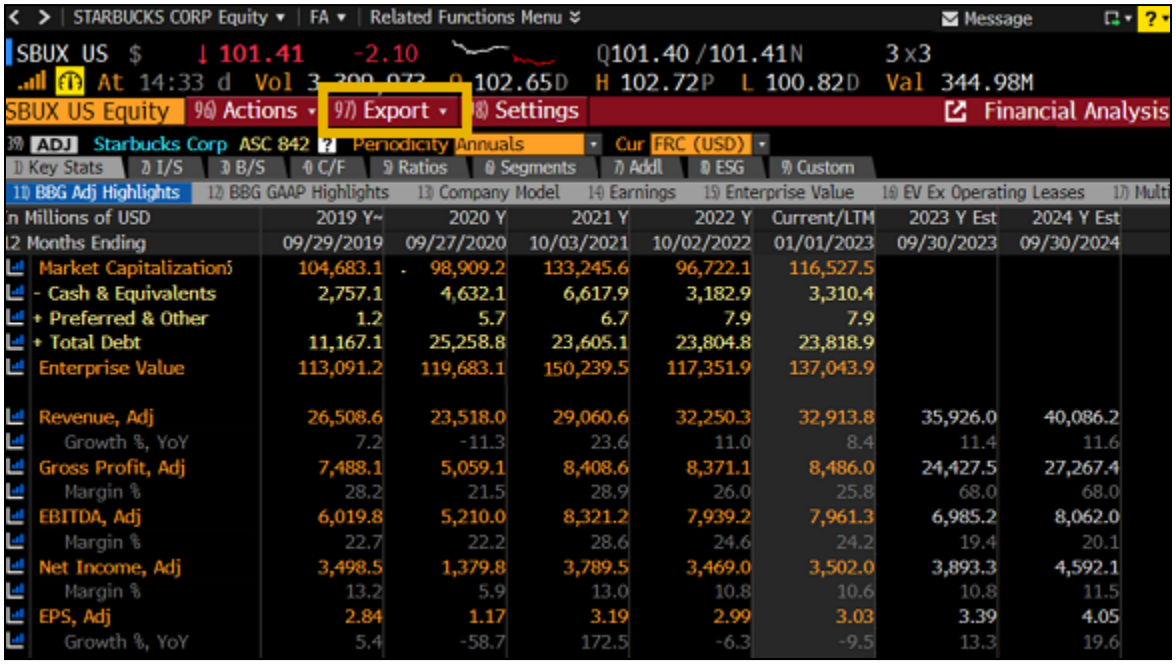
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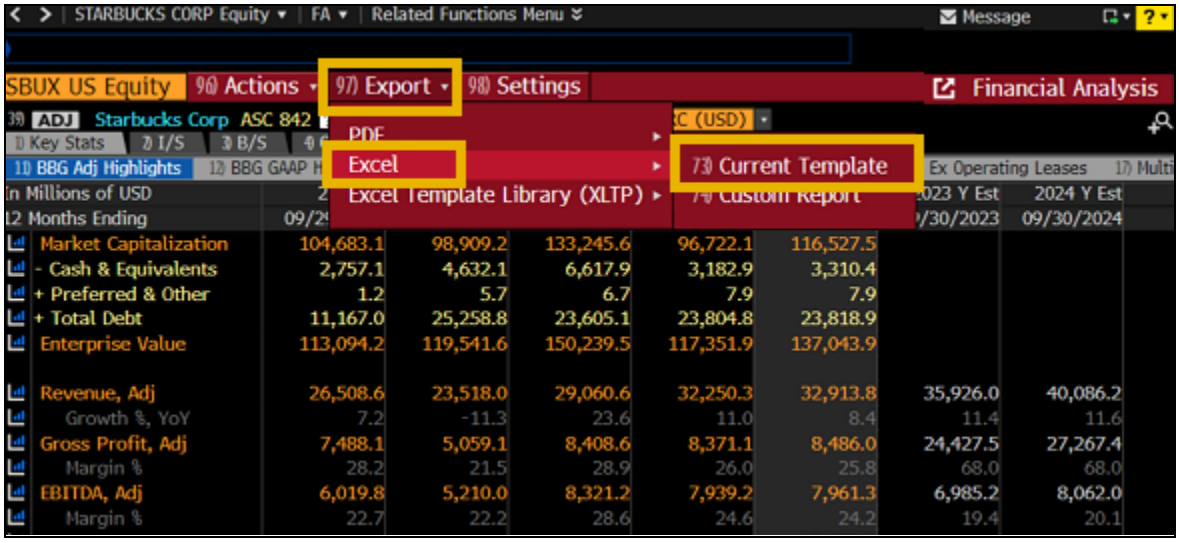
1. Using 97) Export to Download Data

Description: Many of the screens in the Bloomberg Terminal will have the option to use **97) Export** to download data into Excel.

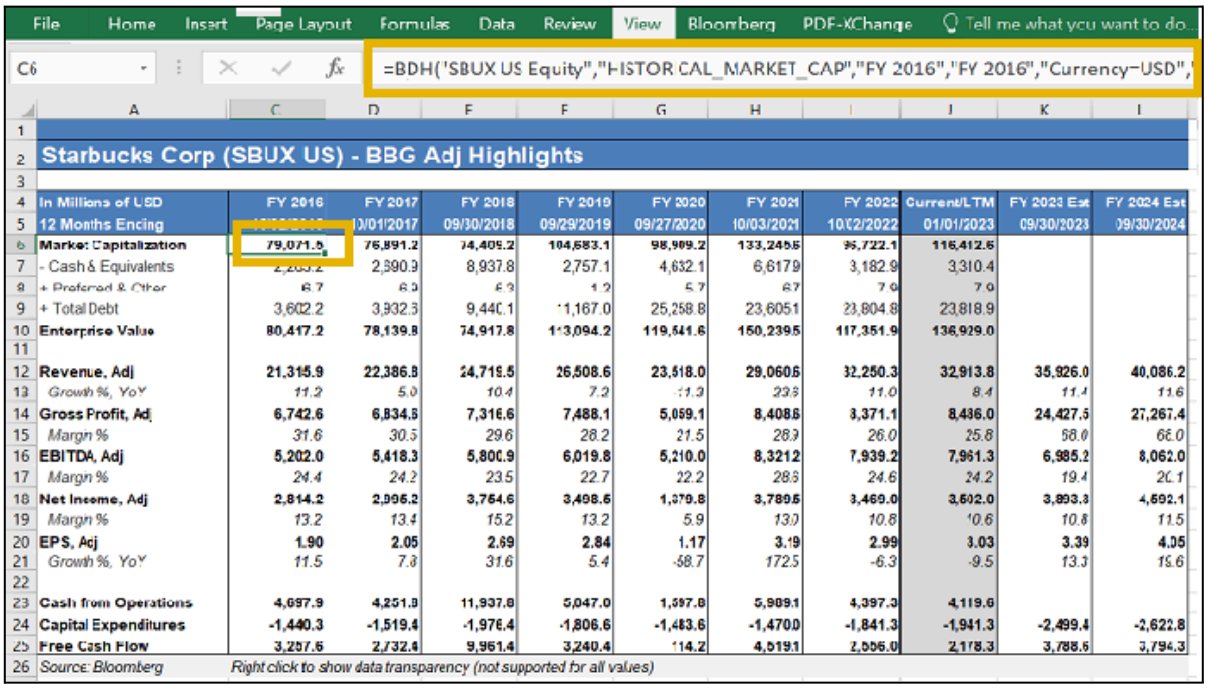
1. Take a look at the red bar at the top of the Bloomberg screen, if you see **97) Export,** you will be able to download data from this screen to Excel using this method.



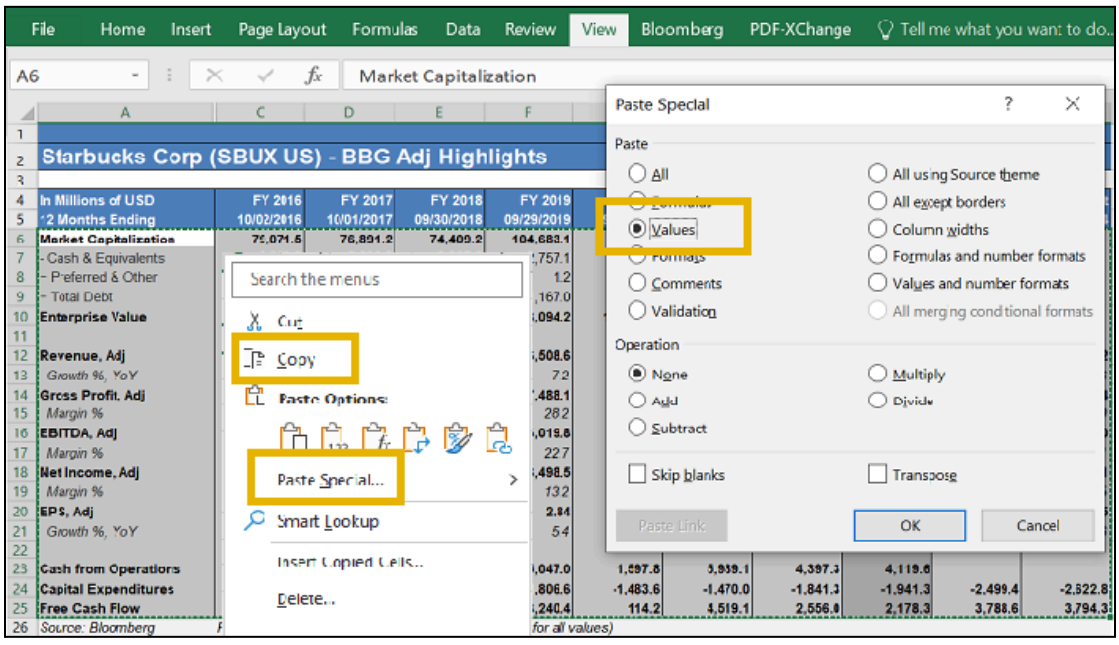
2. Click on **97) Export**. Select **Excel** and then **73) Current Template.**



3. Excel will launch automatically and your data will populate the open spreadsheet. At this point, the formulas in Excel are live.



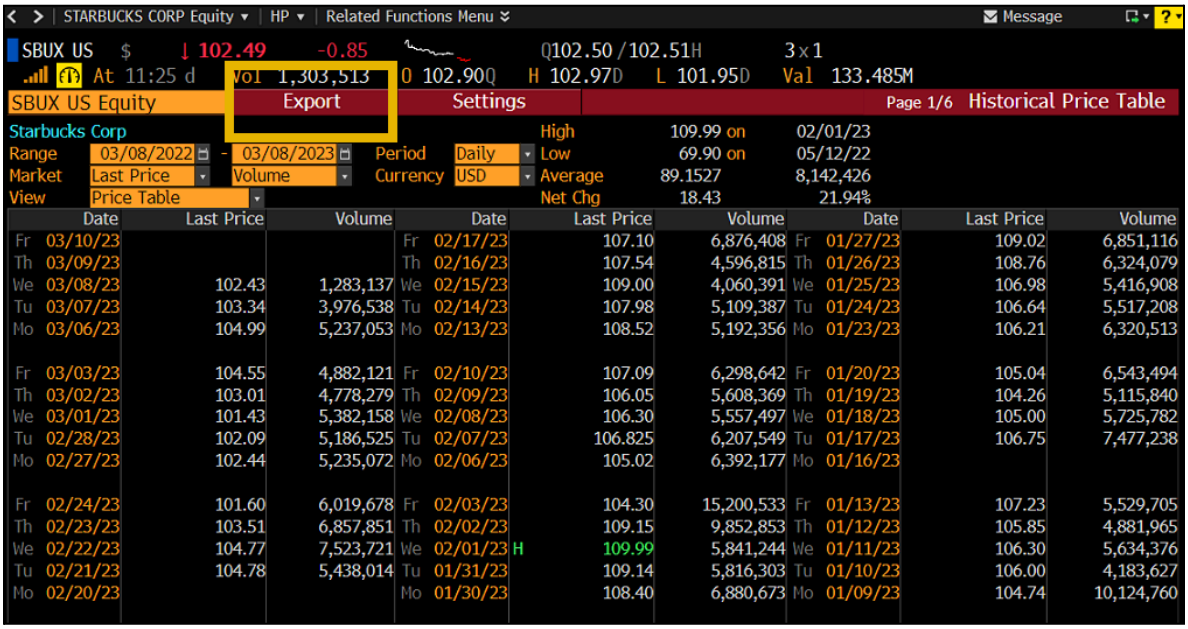
4. Select all of the data, right-click and **Copy.** Right-click again on **Paste Special - Values** over the same area. This will allow you to conduct analysis on values.



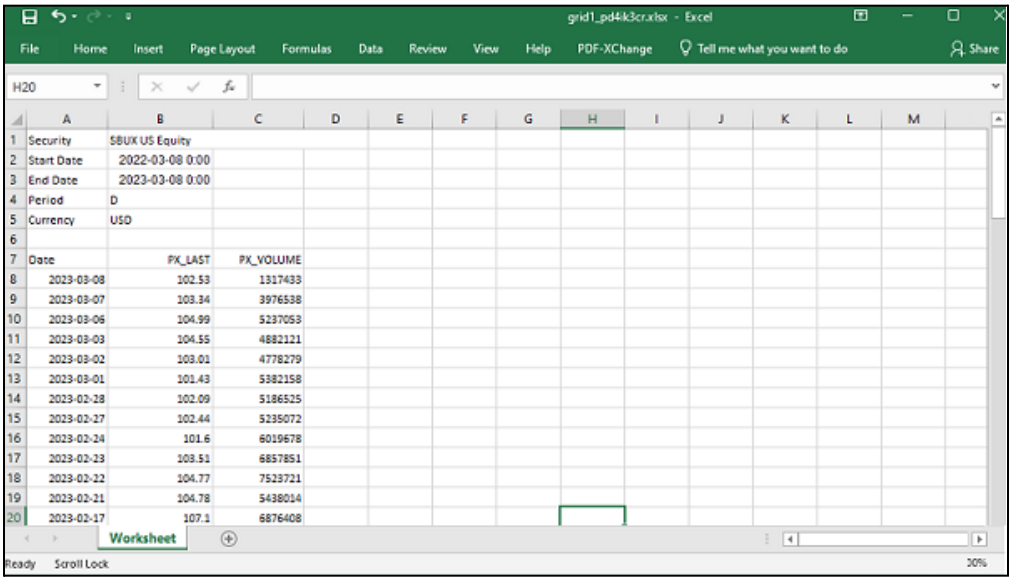
2. Using Export to Download Data

Description: For some screens, **Export** provides the ability to capture data in Excel. For example, Export is an option for the HP screen.

1. Click on **Export.**



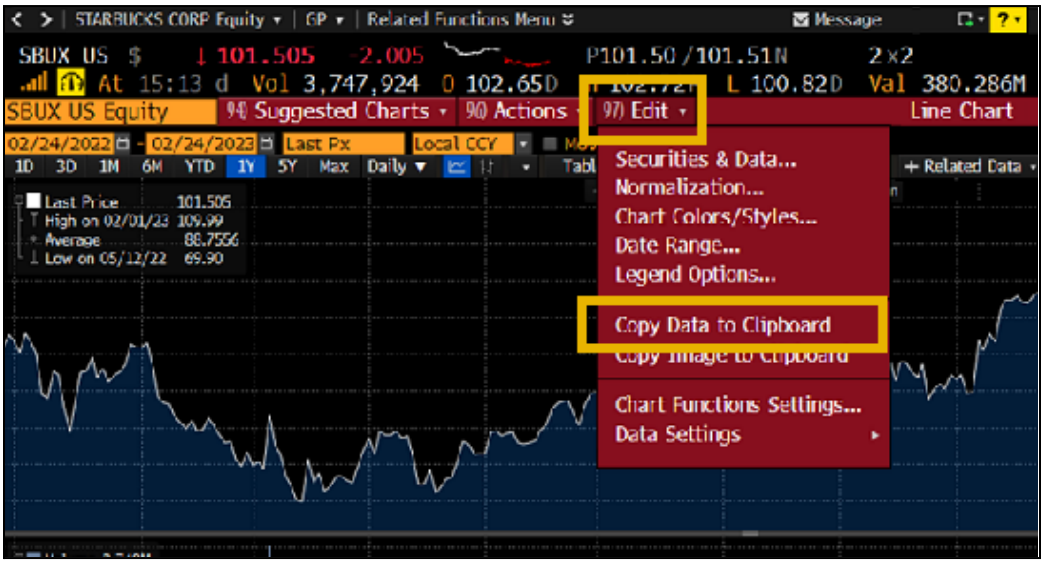
2. **Excel** opens automatically and populates a worksheet with the data from the screen.



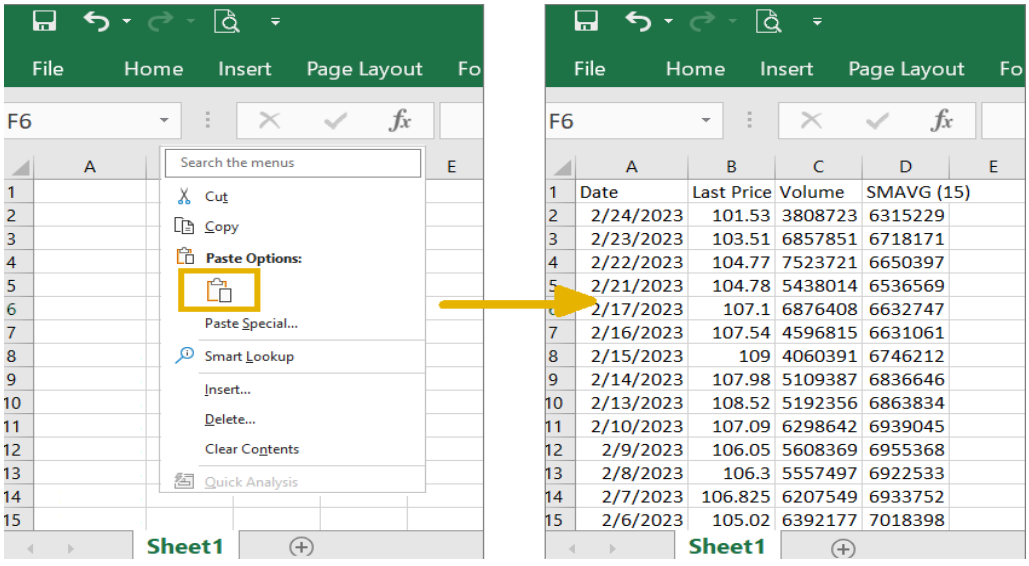
3. Using 97) Edit to Capture Graph Data

Description: Bloomberg often provides graphs to illustrate the progression of data over time. It is possible to capture the data behind the graphs using **97) Edit.**

1. Look at the red bar at the top of the Bloomberg screen, if you see **97) Edit,** you will be able to download the data. Click on **97) Edit**, then click on **Copy Data to Clipboard**.



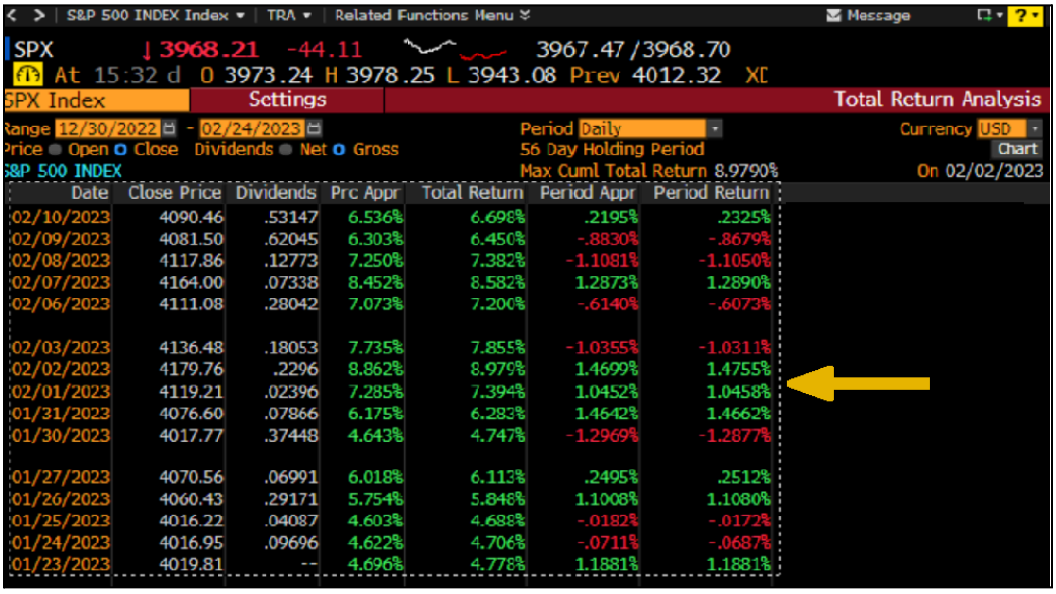
2. Launch Excel from the workstation desktop and open a blank worksheet. Position cursor in a cell, right-click and select the Paste icon (or CTRL+V). The data behind the graph will download into the rows/columns of the worksheet.



4. Using Drag & Drop to Copy Data to Excel

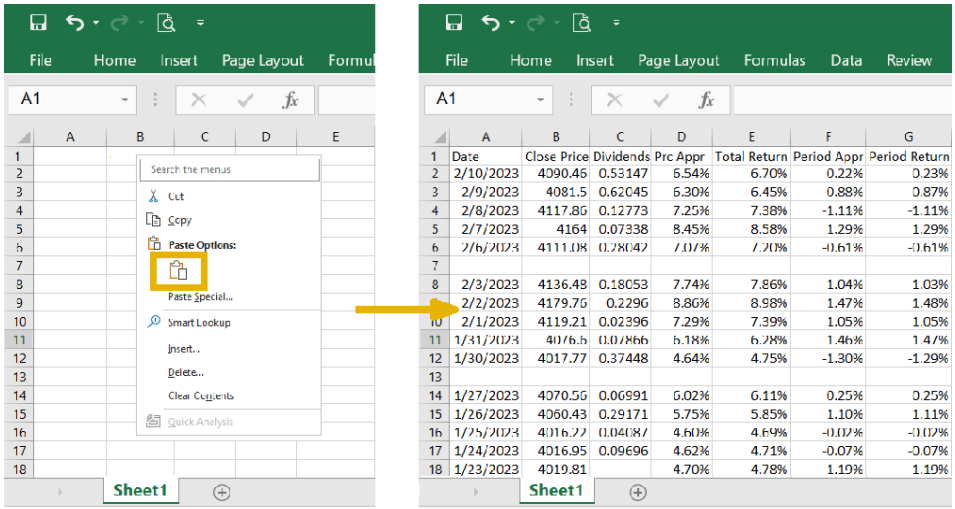
Description: Some screens allow you to highlight and paste the data into an Excel worksheet (e.g., S&P Index).This method captures only the data visible on the screen, so you may need to cut/paste multiple times to get relevant data into Excel.

1. Using the mouse, **highlight** the data on the screen. (Bloomberg will copy text/data automatically, without need for CTRL+C.)



Date	Close Price	Dividends	Prc Appr	Total Return	Period Appr	Period Return
02/10/2023	4090.46	.53147	6.536%	6.698%	.2195%	.2325%
02/09/2023	4081.50	.62045	6.303%	6.450%	-.8830%	-.8679%
02/08/2023	4117.86	.12773	7.250%	7.382%	-1.1081%	-1.1050%
02/07/2023	4164.00	.07338	8.452%	8.582%	1.2873%	1.2890%
02/06/2023	4111.08	.28042	7.073%	7.200%	-.6140%	-.6073%
02/03/2023	4136.48	.18053	7.735%	7.855%	-1.0355%	-1.0311%
02/02/2023	4179.76	.2296	8.862%	8.979%	1.4699%	1.4755%
02/01/2023	4119.21	.02396	7.285%	7.394%	1.0452%	1.0458%
01/31/2023	4076.60	.07866	6.175%	6.283%	1.4642%	1.4662%
01/30/2023	4017.77	.37448	4.643%	4.747%	-1.2969%	-1.2877%
01/27/2023	4070.56	.06991	6.018%	6.113%	.2495%	.2512%
01/26/2023	4060.43	.29171	5.754%	5.848%	1.1008%	1.1080%
01/25/2023	4016.22	.04087	4.603%	4.688%	-.0182%	-.0172%
01/24/2023	4016.95	.09696	4.622%	4.706%	-.0711%	-.0687%
01/23/2023	4019.81	--	4.696%	4.778%	1.1881%	1.1881%

2. Launch **Excel** from the workstation desktop and open a blank worksheet. Position cursor in a cell, right-click and select the **Paste** icon (or press **CTRL+V**). The data behind the graph will download into the rows/columns of the worksheet.



Date	Close Price	Dividends	Prc Appr	Total Return	Period Appr	Period Return
2/10/2023	4090.45	0.53147	6.54%	6.70%	0.22%	0.23%
2/9/2023	4081.5	0.62045	6.30%	6.45%	0.88%	0.87%
2/8/2023	4117.86	0.12773	7.25%	7.38%	-1.11%	-1.11%
2/7/2023	4164	0.07338	8.45%	8.58%	1.29%	1.29%
2/6/2023	4111.08	0.28042	7.07%	7.20%	-0.61%	-0.61%
2/3/2023	4136.48	0.18053	7.74%	7.86%	1.04%	1.03%
2/2/2023	4179.76	0.2296	8.86%	8.98%	1.47%	1.48%
2/1/2023	4119.21	0.02396	7.29%	7.39%	1.05%	1.05%
1/31/2023	4076.6	0.07866	6.18%	6.28%	1.46%	1.47%
1/30/2023	4017.77	0.37448	4.64%	4.75%	-1.30%	-1.29%
1/27/2023	4070.56	0.06991	6.02%	6.11%	0.25%	0.25%
1/26/2023	4060.43	0.29171	5.75%	5.85%	1.10%	1.11%
1/25/2023	4016.22	0.04087	4.60%	4.69%	-0.02%	-0.02%
1/24/2023	4016.95	0.09696	4.62%	4.71%	-0.07%	-0.07%
1/23/2023	4019.81		4.70%	4.78%	1.19%	1.19%

5. Issue: Excel Not Launching

Description: Occasionally, Excel does not launch as expected when using the export functionality within Bloomberg (e.g., 97) Export). Follow the steps below to resolve the issue.

1. Press **Alt + D** or click on the **Gear icon** in the top right corner of the Bloomberg screen and select **Terminal Defaults** from the drop down menu.



2. Choose the **Setup tab** in the Terminal Defaults window. Beside **Download Setup,** click **Edit.** Check box **Download to Bloomberg TEMP.** Click **OK.** Excel should launch appropriately on your next download.

