

# Step-by-Step: SDC Platinum via Workspace - Screening and Exporting M&A Deals by Country and Industry in SDC via the Workspace Web

## 1. Accessing SDC via the Web

- a. Go to <https://workspace.refinitiv.com/web>
- b. Sign in Workspace using your Workspace User ID and Password



English ▼

 **LSEG**

User ID

Password

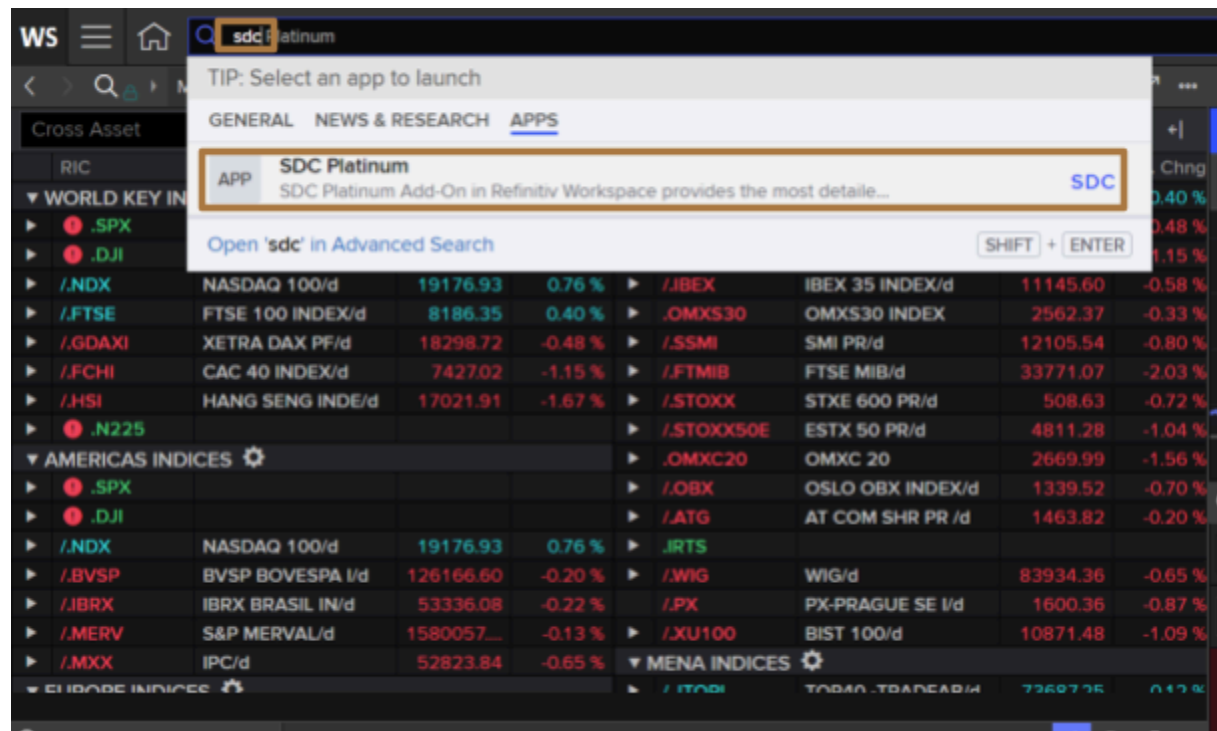
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## Screening and Exporting M&A Deals by Country and Industry

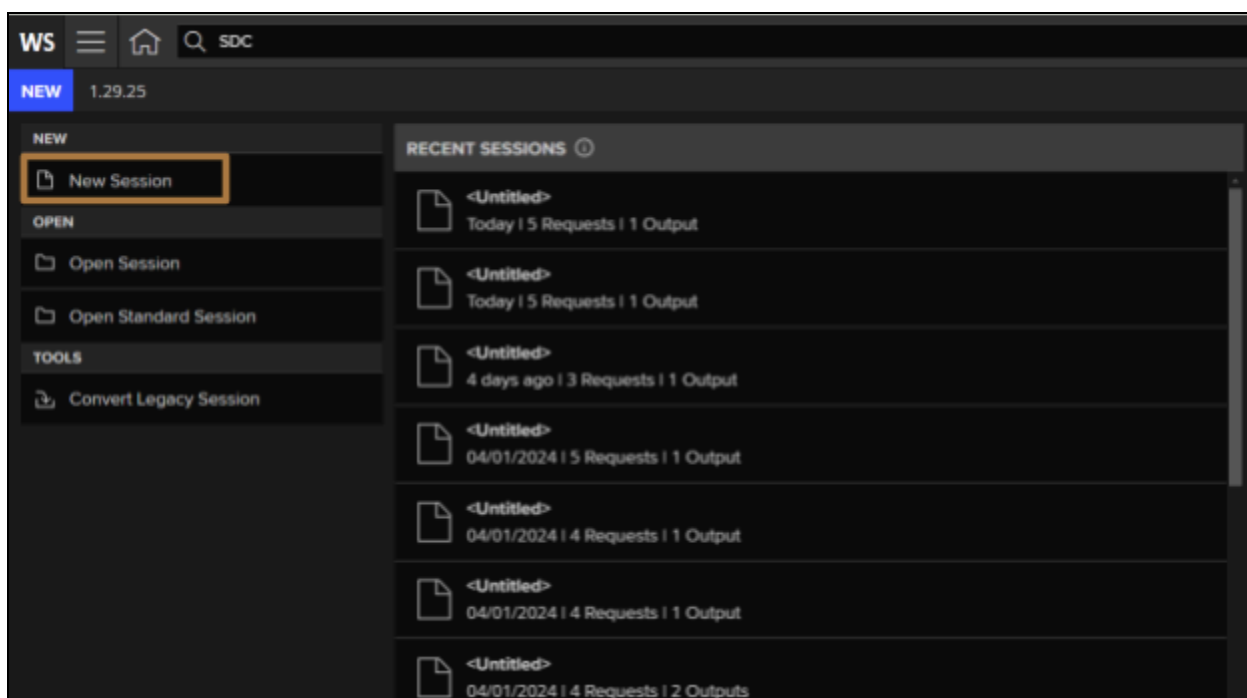
- c. In the search field insert SDC in the upper search field, and select the SDC Platinum application to launch it.



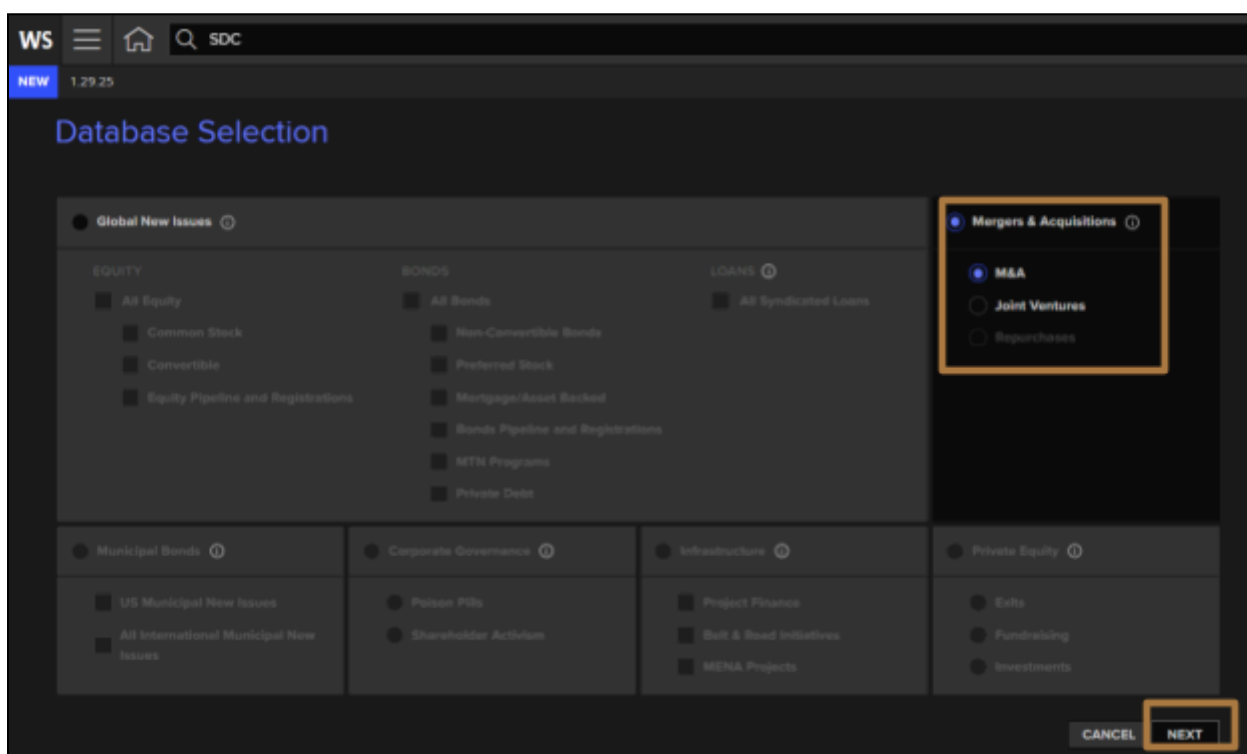
**Tip:** The Workspace Desktop interface is similar to the Workspace Web but with extra [installation](#).

2. In the SDC landing page, click the **New Session** in the left column to create a new session which allows you to set search criteria, generate reports and more.

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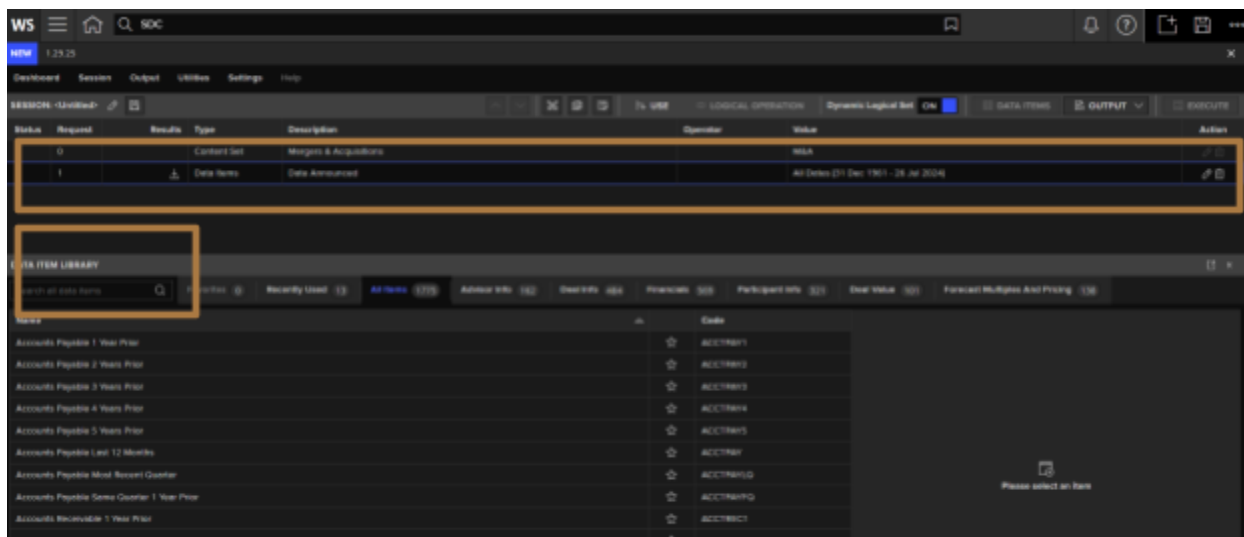
3. Select a database, i.e. **M&A** within the **Mergers & Acquisitions** section, and click the **Next** button in the lower right corner.



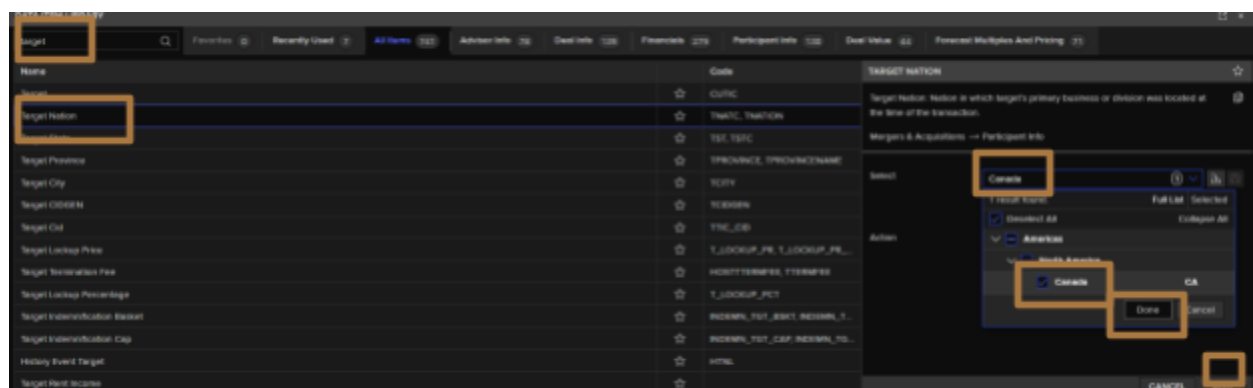
## Screening and Exporting M&A Deals by Country and Industry

**Tip:** We do not have a subscription to all SDC databases and as a result, not all databases can be selected in the Database Selection page.

4. In the new M&A session, the selected database is shown in the upper part of the window and the lower **Data Item Library** allows you to set criteria to screen deals.



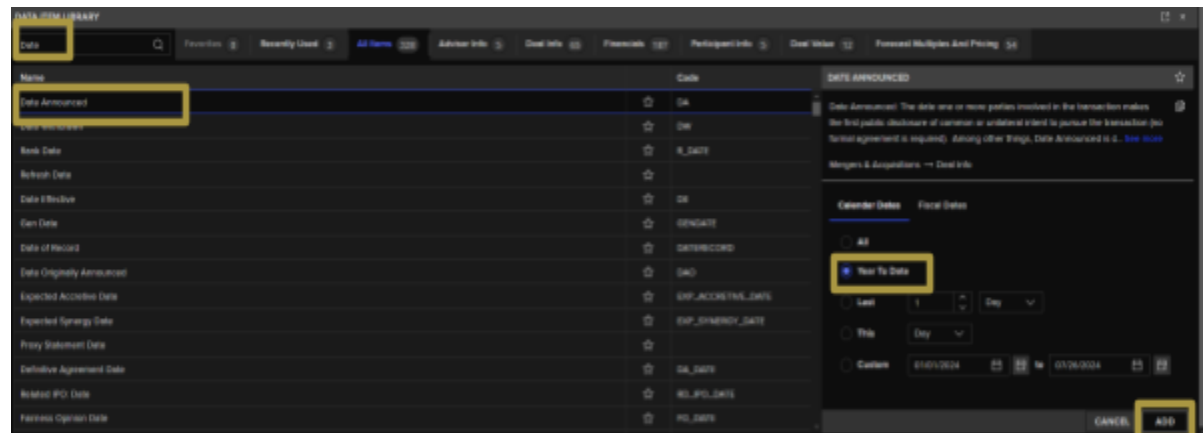
5. For this example, we are going to screen M&A deals in Canada for the Energy industry year to date,
  - a. **Insert Target in the Data Item Library** search field and select **Target Nation** in the recommended options and in the **Target Nation** details pane, insert **Canada** in the Select field, and select **Canada** in the result. Hit the **Done** button and then click the **Add** button in the lower right corner to add the criterion to the session.



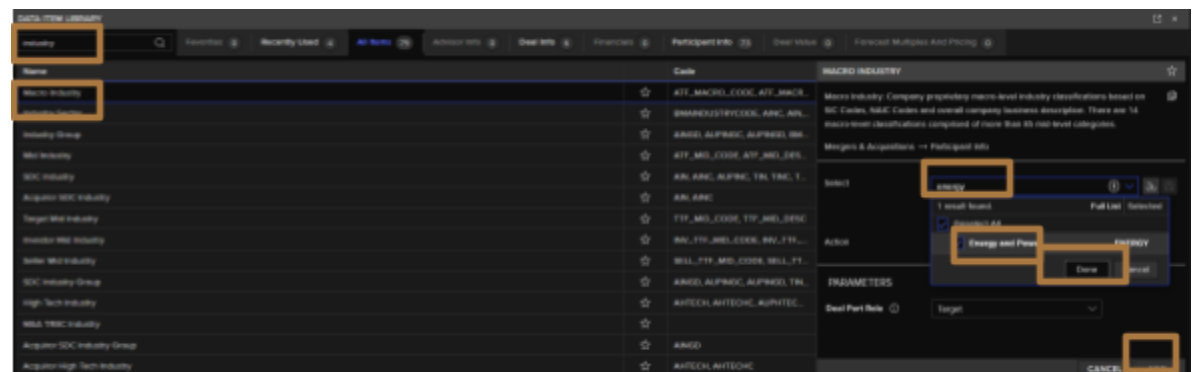
- b. Similarly, add **Canada** as the **Acquiror Nation** to the session.

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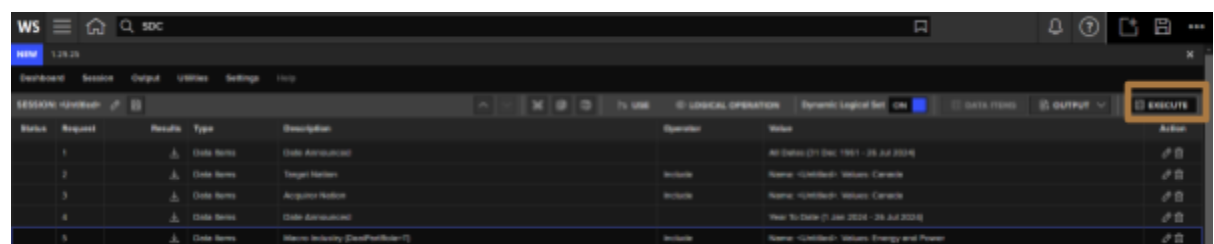
- c. Insert **Date** in the search field of the **Data Item Library** and select **Date Announced** as a search criterion. In the **Date Announced** details pane select **Year to Date** and click the **Add** button in the lower right corner to add it to the session.



- d. Add Energy and Power Macro Industry as a search criterion to the session.

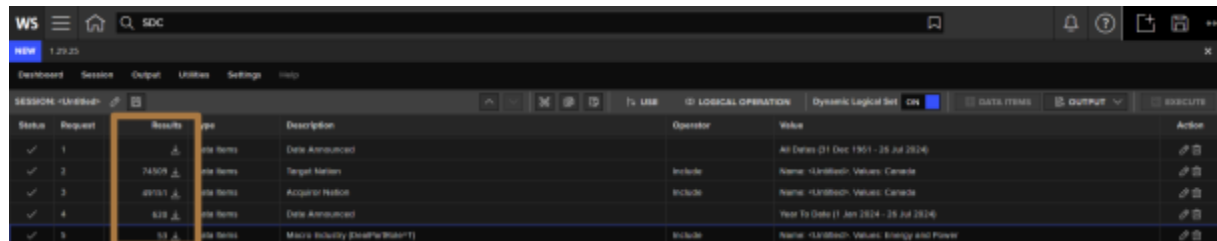


- e. Click the **Execute** button in the upper right corner to run all the search criteria added.



- f. The number of results that meet the added criteria is shown in the Results column

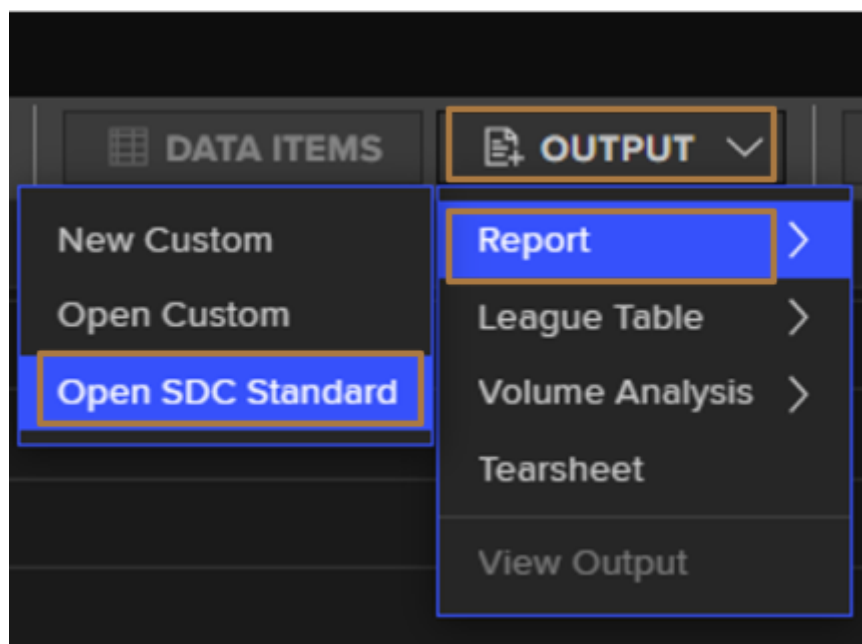
## Screening and Exporting M&A Deals by Country and Industry



Status	Request	Results	Type	Description	Operator	Value	Action
✓	1		Data Items	Data Announced		All Dates (31 Dec 1901 - 31 Jul 2024)	
✓	2	74308	Data Items	Target Nation	Include	Name: <Unlabeled> Values: Canada	
✓	3	49131	Data Items	Acquirer Nation	Include	Name: <Unlabeled> Values: Canada	
✓	4	818	Data Items	Data Announced		Year To Date (1 Jan 2024 - 31 Jul 2024)	
✓	5	52	Data Items	Media Industry (Small/Medium)	Include	Name: <Unlabeled> Values: Energy and Power	

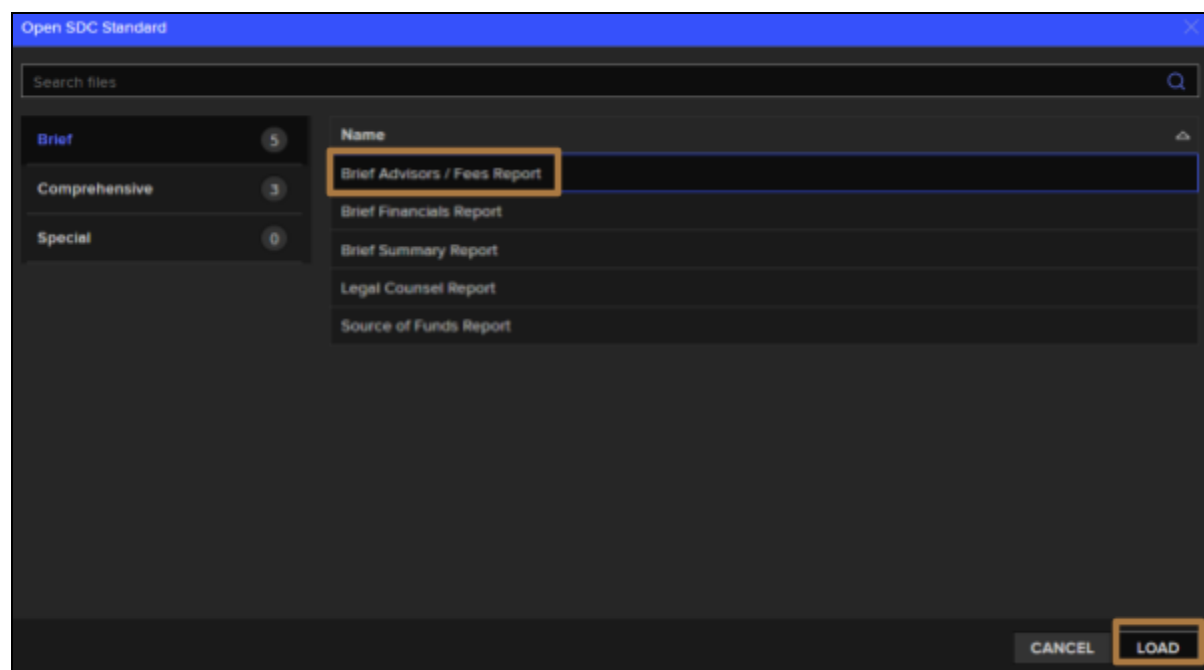
6. Create a Report.

- a. Click the **Output** button, select **Report** and then select **Open SDC Standard**



- b. In the Open SDC Standard pop-up window, select Brief Advisors / Fees Report and then click the Load button to load the report.

## Screening and Exporting M&A Deals by Country and Industry



- c. Click on the Execute button in the upper right corner again to run the report then click the Excel button > Export as Values to export the report to Excel.

The screenshot shows the SDC Standard interface with the 'Export' button highlighted in the top left corner. The main table displays a list of M&A deals. The columns are: Date Announced, Date Effective, Date Effective (in...), Target Short Name, Acquirer Short Name, Acquirer Financial..., Bank Value (M...), Deal Value (M...), Target & Acquisi..., and Currency of Deal. The table contains 15 rows of data.

Date Announced	Date Effective	Date Effective (in...)	Target Short Name	Acquirer Short Name	Acquirer Financial...	Bank Value (M...)	Deal Value (M...)	Target & Acquisi...	Currency of Deal
01/04/2024			General Steel H...	Bent Capital B...		15.40	15.40	Connection De...	
01/04/2024	02/07/2024	02/07/2024	Wendover SM C...	National Bank F...	Adams Energy ...	19.00	19.00	Connection De...	
01/10/2024	01/10/2024	01/10/2024	Beutelsch-Drill...	Carroll's Invest...				US Dollar	
01/11/2024			Griffin Water...	Target Capital L...				Connection De...	
01/11/2024			Secure Energy ...	Secure Energy ...		232.43	232.43	Connection De...	
01/10/2024			Vision Battery L...	Beutelsch-Drill...				US Dollar	
01/10/2024			Pace Resources...	Pace Resources...		262.42	262.42	Connection De...	
01/04/2024	01/04/2024	01/04/2024	WFB-Hill-Son...	Le Energy Pl...				US Dollar	
01/05/2024			South Energy ...	South Energy ...				Connection De...	
01/01/2024	01/01/2024	01/01/2024	Black Rock...	Investment...				Connection De...	
01/01/2024	01/01/2024	01/01/2024	Black Rock...	Black Rock...				US Dollar	
02/01/2024	02/01/2024	02/01/2024	Interlock Inc.	South Blue Ch...		2.69	2.69	Connection De...	
02/05/2024	02/05/2024	02/05/2024	Pace Natural ...	Cypress Creek L...				US Dollar	
02/10/2024			AG Paradox Pl...	Long Energy Inc.	Raymond Jones...	15.00	15.00	Connection De...	
02/10/2024	02/10/2024	02/10/2024	Valero Energy...	Mutual-Global...				US Dollar	
02/14/2024	04/14/2024	04/14/2024	Universal Coppe...	Evans & Evans L...	Udell Copper ...	3.04	3.27	Connection De...	
02/15/2024	02/15/2024	02/15/2024	Elmwood Inc.	Delco Inc.				US Dollar	

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