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**S&P Global**

Market Intelligence

## **CASE STUDY**

# **Simplifying the Assessment of Company Fundamental Data**

### **THE CLIENT:**

A small financial  
technology firm

### **USERS:**

The data operations team

This small-sized financial technology firm was established a few years ago to provide retail investors with information to help buy stocks. The firm offers visual displays of company fundamental data, letting its growing base of users easily evaluate the financial health of a company before having to read extensive reports.



## Pain Points

The firm needed access to good quality financial data to drive its applications if it was to have a successful launch. The data operations team spoke with a number of potential providers, but couldn't identify one company capable of delivering the broad range of information that was needed for its visual displays. The team turned to S&P Global Market Intelligence ("Market Intelligence") to learn more about its capabilities.

**The data operations team was looking for a one-stop solution for a wide range of essential data to drive heavily-used applications on the firm's website.**



## The Solution

Market Intelligence discussed a wide array of data available on its platform. This included:



### Company Financials

Over 5,000 individual data items, comprising industry-specific metrics on 17 industries.<sup>1</sup> The financials are adjusted for nonrecurring charges to enhance cross-company comparability and can be easily linked back to the source documents. Daily and monthly market data is also included across active and inactive publicly-traded companies



### Estimates

Consensus and detail level estimates from hundreds of contributors worldwide, with over 55 periodic and non-periodic measures (e.g., EPS, Revenue, Net Income, price target, and recommendations).



### Company Profiles

Profiles of public and private firms worldwide including company contact information, competitors, financial auditors, and summary or detailed-level business descriptions.

<sup>1</sup> All data mentioned in this Case Study is as of April 2020.

**Ownership**

Detailed historical equity ownership data on over 90,000 public and private companies, institutional investment firms, mutual funds, and insiders/individual owners.

**Key Developments**

Information on more than one million key developments for public, private, and investment firms globally, with topics such as earnings announcements, dividends, board meetings, customer announcements, and organization structural changes.

**Professionals**

Insight on over 3.2 million professionals, including their biography, contact data, education, compensation, affiliations, and corporate board memberships — each linked to a person ID.

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Discussions then turned to Xpressfeed, a proprietary data loading and maintenance technology that provides a reliable and efficient solution to data delivery and management. The Xpressfeed Loader application has automatic schema generation that simplifies maintenance and enables a fully-populated database to be up and running quickly. Additionally, the Loader runs client-side, providing greater control over when and how the data is processed in internal depositories.



## Key Benefits

Market Intelligence data and delivery solutions have provided many benefits, including:

- **Efficiencies from having a one-stop shop for a wide range of essential data** to drive heavily-used applications on the firm's website.
- **A feeling of confidence** knowing that the data goes through a robust series of quality checks.
- **Ease of maintenance** with a delivery mechanism that quickly refreshes data when new releases become available.
- **Ongoing information** to stay apprised of new developments at Market Intelligence that may be of interest, such as alternative textual data.

*[Click here](#) to learn more about our data services and delivery mechanisms.*

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# S&P Global

## Market Intelligence

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