What’s the plan?

- Further support
- Orbis in a nutshell
- Search criteria (home screen) → defining the dataset
- List view → assigning the variables
- Exporting to Excel
- Company reports & corporate structure
Further support

- Contact the data librarians for short questions by mail or to make an appointment: infofm@ubn.ru.nl

- Always mention: **topic**, **supervisor**, **sample** and **variables** & **historical timeframe**

- Visit our office: EOS 01.545

- Follow-up workshops as of 18 March (to be scheduled)
Further support (2)

- Orbis Quick Reference Card (on our Library Guide)
- Orbis Learning Centre (reference material & video tutorials)
Orbis in a nutshell - strengths

- Listed & non-listed companies
- Corporate ownership and corporate structure
- Aggregated accounting data, financial ratios, shareholders information, directors characteristics etc.
- Coverage: worldwide, last 10 years (historical data available)
- 8 simultaneous users
Orbis in a nutshell - weaknesses

- Quite slowly updated
- Board data → use BoardEx
- Crowdfunding and startups → try Crunchbase
- Stock data & financial markets → use FactSet or Eikon
- Event studies → use FactSet, Eikon or Zephyr
- Original filings → try LexisNexis (incomplete) or Eikon/FactSet (mainly listed firms)
- Orbis can be quite slow…
Orbis – old & new interface

Old interface has most options, but...

works slow at times and can be overwhelming...
Delimit your dataset by adding criteria:

**Australian multinationals with R&D expenditures, 2011-2017**
Orbis – home screen (2)

Location:

Australian multinationals with R&D expenditures 2011-2017
Orbis – home screen (3)

Select e.g. ownership criteria

Tip: see also the extensive Ownership Guide in Orbis
Ownership: Australian multinationals; determine your own criteria (location & % ownership)
Filter on availability of financials in certain years (optional)

<table>
<thead>
<tr>
<th>Variable: Research &amp; Development Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Values: In thousand USD</td>
</tr>
</tbody>
</table>

- **Variable**
- **Values**
- **Time period**

- **Value**
- **Growth rate**
- **Rate of decline**
- **Companies with a positive trend**
- **Companies with a negative trend**

Select all companies with a known value

Make sure you select the right category and test whether you do not downsize too much!
Orbis – home screen (6)

Filter on availability of financials in certain years (optional)

Make sure you select the right category and test whether you do not downsize too much!
Orbis – home screen (7)

Add more criteria -> test your query, e.g. by (un)checking boxes and using boolean logic. Just see what works & go to results!

Think about the consequences of each step!
Orbis – list view (1)

Standard variables -> pick your own variables:

You can always go back to your query in the left-hand corner, but do not use the back button of the browser!
Orbis – list view (2)

Add the desired variables (by clicking on them):

Use the tree-menu or search by keyword
Add more variables:

Tip: the structure of the menu corresponds with the structure of the (variable-)filters in the home screen.
Orbis – list view (3)

Customize the variables, e.g. year(s), currency:
Always add identifiers, including at least the ISIN code (for listed firms)!

Orbis – list view (4)
### Export the data to Excel

You have modified the view. Save as. Undo changes.

Your search: 891 companies

<table>
<thead>
<tr>
<th>Company name</th>
<th>Flags</th>
<th>SvD ID number</th>
<th>ISNI number</th>
<th>Country ISO code</th>
<th>NACE Rev. 2, core...</th>
<th>Last avail. year</th>
<th>No of subsidiaries</th>
<th>Research &amp;...</th>
<th>Research &amp;...</th>
<th>Research &amp;...</th>
<th>Research &amp;...</th>
<th>Research &amp;...</th>
<th>Research &amp;...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. WESFARMERS LIMITED</td>
<td></td>
<td>AU000164949</td>
<td>AU0000000WES1</td>
<td>AU</td>
<td>2039</td>
<td>2018</td>
<td>65</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2. SHP GROUP LIMITED</td>
<td></td>
<td>AU000420877</td>
<td>AU0000000SHP4</td>
<td>AU</td>
<td>0510</td>
<td>2010</td>
<td>230</td>
<td>0</td>
<td>0</td>
<td>-13,000</td>
<td>-27,000</td>
<td>-64,000</td>
<td>-75,00</td>
</tr>
<tr>
<td>3. RIO TINTO LIMITED</td>
<td></td>
<td>AU004456904</td>
<td>AU0000000RIO1</td>
<td>AU</td>
<td>0729</td>
<td>2017</td>
<td>30</td>
<td>-50,000</td>
<td>-50,000</td>
<td>-104,000</td>
<td>-112,000</td>
<td>-231,000</td>
<td>-246,010</td>
</tr>
<tr>
<td>4. TELSTRA CORPORATION LIMITED</td>
<td></td>
<td>AU051773556</td>
<td>AU0000000TSL1</td>
<td>AU</td>
<td>6190</td>
<td>2018</td>
<td>86</td>
<td>0</td>
<td>0</td>
<td>-1,536</td>
<td>-3,768</td>
<td>-1,854</td>
<td>-5,01</td>
</tr>
<tr>
<td>5. CALTIX AUSTRALIA LIMITED</td>
<td></td>
<td>AU004201307</td>
<td>AU0000000CTK1</td>
<td>AU</td>
<td>1920</td>
<td>2017</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6. QANTAS AIRWAYS LIMITED</td>
<td></td>
<td>AU00661001</td>
<td>AU0000000QAN2</td>
<td>AU</td>
<td>5110</td>
<td>2018</td>
<td>84</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>7. LEND LEASE GROUP</td>
<td></td>
<td>AU000564A</td>
<td>AU0000000LCE3</td>
<td>AU</td>
<td>6831</td>
<td>2018</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8. METCASH LIMITED</td>
<td></td>
<td>AU12973400</td>
<td>AU0000000MTS0</td>
<td>AU</td>
<td>4817</td>
<td>2018</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9. ORIGIN ENERGY LIMITED</td>
<td></td>
<td>AU000051600</td>
<td>AU0000000ORS1</td>
<td>AU</td>
<td>6610</td>
<td>2018</td>
<td>20</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>10. CIMIC GROUP LIMITED</td>
<td></td>
<td>AU004482982</td>
<td>AU0000000CIM1</td>
<td>AU</td>
<td>4299</td>
<td>2017</td>
<td>133</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>11. AGIL ENERGY LIMITED</td>
<td></td>
<td>AU15061375</td>
<td>AU0000000AGL7</td>
<td>AU</td>
<td>3512</td>
<td>2018</td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>12. MANCOR LIMITED</td>
<td></td>
<td>AU000917372</td>
<td>AU0000000AMC4</td>
<td>AU</td>
<td>1729</td>
<td>2018</td>
<td>151</td>
<td>-99,100</td>
<td>-87,400</td>
<td>-82,900</td>
<td>-89,700</td>
<td>-51,175</td>
<td>-69,410</td>
</tr>
</tbody>
</table>
Orbis – export (2)

Export the data to Excel
Ready to clean the data in Excel
Tip: identifiers are a prerequisite for data-merging!
Orbis – company reports (1)

Select a company to view the report

Customize the report in the right column (applies to all reports in the dataset)
Orbis – Company reports (3)

Create an ownership report to get e.g. ...

<table>
<thead>
<tr>
<th>AMCOR LIMITED</th>
<th>HAWTHORN, Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activity:</strong> Corporate, Wood, Furniture &amp; Paper Manufacturing</td>
<td></td>
</tr>
<tr>
<td><strong>Main stock exchange:</strong> Australian Securities Exchange</td>
<td></td>
</tr>
</tbody>
</table>

- **Turnover for 2018:** $ 9.35 bn (+2.0%)
- **Net income for 2018:** $ 724 m (+21%)
- **Market Cap on 15/02/2019:** $ 12.4 bn (+0.5%)

**Ownership**
- **Shareholders:** 65 shareholders
- **Subsidiaries:** 163 subsidiaries
- **Companies in the corporate group:** 244 companies in the corporate group

**Corporate ownership**
- Ownership structure
- Geographic footprint
- Corporate group
- Controlling shareholders
- Current shareholders
- Shareholders history
- Current subsidiaries
- Branches
- Royalties agreements
- News & deals
Orbis – Company reports (4)

The corporate group

Tip: you can search for/filter on all kind of ownership data in the home screen
Orbis – Company reports (5)

Or ownership structure

Everything can be exported, as pdf or image as well
Three things to (definitely) remember

- 2 steps: define your dataset & add variables
- Choose variables that correspond with your filters
- Make sure to add identifiers

ANY QUESTIONS?