Getting started with Orbis

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Maarten Gubbels

Data support – NSM Library team

Feb 19th & 27th 2020
What’s the plan?

- Support
- Orbis in a nutshell
- Search criteria → defining the dataset
- Results list view → assigning the variables
- Exporting to Excel
- Company reports & corporate structure
- Related products
Support

➢ Contact the data librarians: datasupport-NSM@ubn.ru.nl
  • (short questions or make appointment)

➢ Mention: topic, sample and variables & historical timeframe, supervisor

➢ Visit our office: EOS 01.545

➢ Follow-up workshops as of March 4th

➢ https://libguides.ru.nl/be/data

➢ https://libguides.ru.nl/BE/FAQdata
Support

- Orbis Learning Zone (reference material & video tutorials)
Orbis in a nutshell – strengths

- Listed & non-listed companies
- Corporate ownership and corporate structure
- Accounting data, financial ratios, shareholders information, director characteristics etc.
- Coverage: worldwide, last 10 years (historical data currently unavailable)
- 8 simultaneous users
- Access (also off campus), link via https://libguides.ru.nl/BE/data or website university library
Orbis in a nutshell – weaknesses

- Quite slowly updated
- Board data → use BoardEx
- Stock data & financial markets → use Eikon or FactSet
- Event studies → use Zephyr, FactSet or Eikon
- Crowdfunding and startups → try Crunchbase
- Original filings → try Nexis Uni (incomplete) or Eikon/FactSet (mainly listed firms)
- Orbis can respond quite slow…
Overview databases

Sources and tools for finding economic and financial literature and data

For more information on data retrieval and analysis tools contact the data support of the NSM Library team.

Self study material and handouts of support sessions can be found in the database descriptions and at our workshop page.

Do you need an answer to simple questions about data? Check out our FAQ data page.

Databases of 'Financials & equities' contain data about i.a. companies, equities, indices, ownership, accounting, patents and markets.

Check the other tabs and think about which data you need for your research.

To contact our (data) librarians see: https://libguides.ru.nl/BE/NSMteam or send an e-mail to datasupport-NSM@ubr.ru.nl.

If 'more...' under a database does not work, look for the same database in a previous tab. This is because of the box format.

- Bank Focus (Orbis)
  - Financial institutions: company specific financials; ownership
    more...

- China Stock Market & Accounting Research (CSMAR)
  - Company specific; equity; Indices; IPO; M&A; corporate governance
    more...

- Eikon/ Datastream - Thomson Reuters
  - Company; financials; accounting; equity; Indices; CSR/ESG; M&A (deals); macro-economics
    more...
Orbis – create search

Delimit your sample by adding criteria:

*Australian multinationals with R&D expenditures, 2011-2018*
Orbis – create search

Location:

<table>
<thead>
<tr>
<th>World region, country &amp; subdivisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add all</td>
</tr>
<tr>
<td>Australia</td>
</tr>
<tr>
<td>Austria</td>
</tr>
</tbody>
</table>
Orbis – create search

Select e.g. ownership criteria

Tip: Tools – Ownership explorer
Ownership: Australian multinationals; determine your own criteria (location & % ownership)
Orbis – create search

Filter on availability of financials in certain years (optional)
Financials → … detailed/ profit & loss … → R&D Expenses

Do not downsize too much!
Orbis – create search

Filter on availability of financials in certain years (optional)

<table>
<thead>
<tr>
<th>Time period</th>
<th>Values</th>
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</table>

Criteria have to be valid for:
- At least one of the selected periods
- All selected periods

Data support - NSM Library team
Orbis – create search

Add criteria → test your query:
e.g. by (un)checking boxes and using boolean logic

What are the consequences of each step?!
Orbis – save search

Always save your search locally (on your own computer)

By default Orbis saves in the cloud. After closing of the browser the saved search is not automatically retained!
Orbis – save search

Export your saved search to your computer through ‘load a search’
Orbis – save search

Import a saved search by clicking on the folder-icon

And ‘import’
**Orbis – results list view**

Select variables: ‘Add/remove columns’
(default variables below)

![Image of results list view]

- Select variables: ‘Add/remove columns’
- (default variables below)

You can go back to your query (Menu or ‘Add a search step’)
**Do not use** the ‘page back’ button of the browser!
Orbis – results list view

Add the desired variables:

Use the tree-menu or search by keyword
Orbis – results list view

Add variables:

The structure of the menu = structure of the home menu (company filters)
Orbis – results list view

Customize the variables, e.g. year(s), currency:

If you cannot select multiple years at once, change to ‘free view’ on results page.
Always add identifiers, including at least the ISIN code (for listed firms)!
### Orbis – export

Export the data to Excel

Your search: 841 companies

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<th>Company name</th>
<th>BvD ID number</th>
<th>ISSN number</th>
<th>No of subsidiaries</th>
<th>Research &amp;...</th>
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<th>Research &amp;...</th>
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Data support - NSM Library team
Orbis – export

Export the data to Excel
Orbis – export

Ready to clean the data in Excel/Stata

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<table>
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<tr>
<th>Company name Latin alphabet</th>
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Tip: identifiers are a prerequisite for data-merging!
Orbis – company reports

Select a company to view the report

Customize the report in the left column (applies to all reports in the dataset)
Orbis – company reports

Create an ownership report to get e.g. the corporate group
Orbis – company reports

Or ownership structure

Everything can be exported, as Excel or PDF pdf or image as well

Data support - NSM Library team
Orbis – related databases

- BankFocus (4 users) → interface for financial sector (sometimes Orbis has more history though)
- Zephyr (4 users) → event studies (mainly M&A)
- Orbis IP (2 users) → patents and innovation
Three things to (definitely) remember

1. Define your dataset & add variables
2. Add variables that correspond with your filters
3. Make sure to add identifiers (ISIN, BvD ID)

ANY QUESTIONS?

➢ Come to follow-up workshops from March 4\textsuperscript{th} onwards for assistance
https://libguides.ru.nl/BE/workshops