Bloomberg Keyboard - Each yellow key across the top of the keyboard takes you to a different market. The keys from left to right are:

- GOVT – Government (US Treasury and non-US government agency securities)
- CORP – Corporate Debt
- MTGE – Mortgages
- M-MKT – Money Market (includes Commercial Paper, CDs, Bankers Acceptances, Medium Term Notes)
- MUNI – Municipal Debt
- PFD – Preferred Shares
- EQUITY – Equity Shares
- CMDTY – Commodity Markets
- INDEX – Indexes
- CRNCY – Currency Markets

GO key – Equal to the Enter or Return key on a Bloomberg terminal.

HELP (F1) key – For help on a specific topic, type a keyword and then press the green HELP key. You will be directed to a menu of selections related to that keyword. Ex. spread <HELP> - to locate a list of FAQs on how to formulate various types of spread analysis in Bloomberg.

MENU key – In most cases this will take you back to the previous screen you were in. This is somewhat similar to the BACK key in Internet Explorer.

Email Screen-shots of Bloomberg – To do this type GRAB and the <GO> key, then an e-mail box comes up. Fill in the TO: and Subject: and then send. It will arrive in email as a .gif file.

Change Screen Size – Right click on the mouse key to select menu items to change screen size.

Company Profile – Type the company name and the HELP key. Ex. Ford <HELP> - Provides a company profile which includes links to company research and information on all equity, bonds and loans issued by the Ford Motor Company. Click on “BI Research Primer” to get detailed analysis of the company.

League Tables – Type LEAG and the GO key to link to the league table functions in Bloomberg where you can generate league tables on many different criteria going back several years.

M&A Deals and Analysis (data available back to 1999) – Type MA <GO>.

Bloomberg Intelligence – Type BI and the GO key to get detailed analysis of numerous industry sectors. To get ESG industry comps, click on “Comp Sheets” in the lower left, then Tab “57) ESG”.

Where to go for assistance:

- Live Chat – Press the HELP key twice - This will take you to 7/24 Live Chat Help from Bloomberg.
- Bloomberg Online Interactive Manuals – Type BPS <GO>
How can I get detailed company information in Bloomberg?

Type [ticker], click EQUITY, and click GO to browse main menu or type shortcut to go directly to information. E.g., VOD LN [EQUITY] HP [GO] for Vodafone prices.

- DES for company description
- EE for earnings estimates.
- ERN for earnings.
- FA for financial analysis.
- GP for historical price graph.
- HP for historical price table.
- BRC for analyst reports for company
- RV for peer group relative analysis
- SPLC for supply chain analysis
- MGMT for management profiles.
- PGE for product segmentation.
- QM for quote montage of quotes and market share data from all exchanges where equity trades.
- ANR for analyst recommendations
- FTW for factors to watch for optimization analysis
- TREN for news and twitter sentiment analysis
- ESG for environmental, social and governance metrics for a company

How can I screen for equities and other securities in Bloomberg?

1. Type EQS and click GO.
2. Choose Actions to Edit Display to change the columns displayed or Edit Criteria to change the search criteria.
3. Choose Output then Excel to export table as displayed.

How can I find market index prices, members, and movers in Bloomberg?

Use the format Bloomberg abbreviation for index [INDEX] and use Bloomberg shortcuts to go directly to information, e.g. SPX [INDEX] HP [GO] for S&P 500

- CCMP [INDEX] MEMB [GO] for NASDAQ Composite members
- INDU [INDEX] MOV [GO] for leading and lagging Dow Jones Industrial Average members

How can I get comparative returns in Bloomberg?

To compare returns of up to 3 specific securities and indices type COMP and click GO.

- In amber fields type in the full tickers (including appropriate yellow key) for specific securities or indices. E.g., for Genzyme type GENZ US [EQUITY].
- Use amber fields for Range and Period to specify a date range and frequency.

How can I analyze industries based on ESG metrics?

- Type BI BESGG <GO> for the ESG indicators industry analysis dashboard.
How do I screen for or find performance and rankings of pension funds, mutual funds and other funds in Bloomberg?

To screen for funds based on specific search criteria type FSRC and click GO.

To create a Fund Performance Chart that compares returns of funds across various time periods type FPC and click GO.

1. Choose 99) Fund Family to search for specific funds; in the Search All Families box type Vanguard and then select Vanguard Funds/USA from the list of fund families.
2. Click on a fund name to get more information.

How can I screen for equities and other securities in Bloomberg?

1. Type SRCH and click GO.
2. Choose Actions to Edit Display to change the columns displayed or Edit Criteria to change the search criteria.
3. Choose Output then Excel to export table as displayed.

Excel Add-in

You will need to install the Excel add-in to use Bloomberg in Excel. In theory you should only have to do it once on your account but if it doesn’t show up, follow these installation instructions again.

Excel Add-in Instructions

- Open Excel
- Start Menu – All Programs – Applications – Install Excel Add-in
- Dialog box will pop up – click Install (the installation takes about 5 seconds)
- Click Ok when Installation is finished and close dialog box
- If Bloomberg doesn’t appear as an Excel ribbon heading, close Excel and reopen it
- Any questions, contact a reference librarian or use the Help button on the Bloomberg keyboard. Push the help button twice to get a live chat box with a Bloomberg representative

How can I set up a spreadsheet in Excel with comparative metrics for a list of securities?

1. Open Excel and click on the Bloomberg link tab. (Make sure you are also logged into Bloomberg.)
2. In the A column put in relevant tickers (these can be looked up in Bloomberg). For example: IBM US Equity, MSFT US Equity, etc.
3. Then in Bloomberg type in the ticker that is in cell: A1.
4. Then search for the codes for the metrics of interest, by typing: FLDS – to bring up the Fields look up screen.
5. Then look-up the various fields of interest, i.e. ESG ratings or Price to Earnings, etc. Put the cursor in the relevant Excel cell, i.e. B1. Then put the cursor on the Value in Bloomberg and drag it over to the relevant cell.
6. To make sure the values aren’t lost, once you have all the data you need downloaded to the excel spreadsheet, copy the entire sheet and “Paste-Special” to a blank excel sheet. Now you have a file that you can save and email to yourself.
How can I copy a screen in Bloomberg into Word or a Powerpoint slide?

1. Put your cursor in the view of screen in Bloomberg you wish to copy.

2. Press on the ALT and the PRINT keys.

3. Then to paste the screen into a document, press the CTRL and letter V keys.