NOTE: Lexis-Nexis Academic offers company-specific, financial information, with extensive profiles for publicly traded entities. Database users will find narratives drawn from standard sources – Hoovers, Standard & Poors, Disclosure (SEC), and other publications.

I. How do I find general business news in Lexis-Nexis?

From the main search interface, select “News” from the “Search” tab. Enter a term of interest; in the “Sources” field, select “Business News Publications.” The interface will momentarily pause (reconfigure). To see all sources included in this publication group, select the information icon (“i”) to the right of the search field. Specify a date range of interest; the resulting search screen appears thusly:

The succeeding screen displays search results in the right frame, arranged by publication date (default option). You can also sort records by relevance. The left frame displays publication types; select a category of interest to see this subset. You may also sort records within subsets.

An article’s title is the direct link to its full text; selecting the check box in front of article designates the text for saving or printing. Saved items are denoted in boldface within the frame.
II. How do I research a company using Lexis-Nexis?

Users seeking information for publicly traded companies will find a wealth of financial data available in Lexis-Nexis. Select “Business” from the “Search” tab to see the default option, the “Company Dossier.” A basic search here involves entering a company name or its ticker symbol (NYSE code). If your company has a number of subsidiaries or divisions, a second screen may appear, asking for clarification as to which company you are seeking. For example, the Walt Disney corporation appears thusly:
Select “The Walt Disney Company” (DIS) as the entity of interest; information for privately held companies is very minimal (contact information). The full, dossier entry (“The Snapshot”) for the Walt Disney Company offers many elements, including: contact information, company website link, stock chart, SIC/NAICS codes, description of operations, news items, list of executives, board of directors’ names, list of competitors, and some stock information. Direct links to company information in Hoover’s, Standard & Poor’s News, and Disclosure are offered.
III. What are the differences in the various, company reports?
Deciphering the Reports: Hoovers, Lexis-Nexis, and Disclosure

1. Hoover Reports: Features a company’s 500 Ranking, Executives List (with some salaries) and board of directors list. Company description and history noted; NAICS/SIC codes provided. Subsidiaries and competitors list offered; basic financials included. Report drawn from EDGAR/SEC annual filings.

2. Lexis-Nexis Corporate Affiliations: Offers company information; executives listing (no salaries), and board of directors. Company description and SIC code. Products and competitors’ information; basic financials and SEC information.

3. Disclosure SEC Database: Provides company information, subsidiaries listing, and executives (with some salaries). Board of directors noted with compensation. Company description and SIC code(s). Extensive company financials – assets, liabilities, equity, income statement (cash flow, etc.), and quarterly financials. Also details dividends, stock price, shares held by officers, company narrative, company history and market strategies.

4. SEC Filings: In Lexis-Nexis, insert company name or ticker (NYSE) symbol. From the “Sources” field, select form of interest and then specify date, probably from previous year to note current trends. The forms:

   (a) 8-K: Notes change in directors or officers during calendar year. CEO departure of bankruptcy would be filing cause.
   (b) 10-K: Company’s annual filing. Offers comprehensive summary of company’s performance, history, organizational structure, executive compensation, equity, subsidiaries, audited financial data, and various financial statements. Report is filed every twelve months with the U.S. Securities & Exchange Commission (SEC). Also termed (by SEC) as an “annual proxy statement.”
   (c) 10-Q: Quarterly reports filed by company. Three per year.

A company’s SEC Filings = (3) 10-Q reports + (1) 10-K in final quarter.

IV. Other Lexis-Nexis Options for Business Research

Compare Companies (“Dossier Compare Companies”): Select upwards of five companies of interest for comparison with this feature. Place the company name or its ticker symbol in the search fields (ex. “Walt Disney” and “Six Flags”). Resulting financials include assets, liabilities, income statement, and ratio analyses. Select the “Download Table” option to format results into Excel spreadsheet.

Company Profile: Use a company’s name or ticker symbol and select sources of interest. Use the phrase “executive compensation” to access data on salaries and stock options. Specify date range of interest, if necessary.

SEC Filings: To locate these documents, use the company’s name or ticker symbol. Default option will return all filings; drop down menu allows you to specify report. Select applicable dates and geographic area, if needed.

Accounting: Explores accounting news and issues through a range of professional and trade publications.

Country Profiles: Select country of interest, applicable sources, and date range.