FRONTLINE LEARNING
Powering a Knowledge Driven Organization

Deal Analytics
Thomson Reuters Eikon – Microsoft Office

CONTENTS
Introduction & Coverage .................................................. 2
Enable the Deal Analytics App ......................................... 2
Deal Screener .............................................................. 3
League Table .............................................................. 4
Volume Analysis .......................................................... 4
Recalculation Methods ................................................... 4
Backwards Compatibility ............................................... 5
Estimated Deal Fees ...................................................... 5
Introduction & Coverage

THOMSON REUTERS DEALS CONTENT

Thomson Reuters Deals Content is the industry standard for information on new issues, M&A, syndicated loans, private equity, project finance, poison pills, and more. Backed by our international team of expert analysts, we satisfy your need for a global reach from a local perspective.

Use the Deal Analytics App in Thomson Reuters Eikon - Microsoft Office to access the most thorough and accurate account of the global financial marketplace. We provide you with the tools for analyzing investment banking and deal trends, identifying comparable deals, monitoring deal activity, and generating industry-leading league tables and market-share analysis.

WHAT’S INCLUDED?

Mergers & Acquisitions: Over 900,000 global M&A transactions from the 1970s to the present; including 280,000+ US-target and 620,000+ non-US-target transactions.

Debt Capital Markets: Over 760,000 bond deals since the 1960s, including investment-grade, high-yield, and emerging market corporate bonds and ABS/MBS/Agency issues.

Equity Capital Markets: Over 219,000 equity capital markets new issues including IPOs, follow-ons, block trades, and convertible bonds since the 1970s.

Syndicated Loans: Over 239,000 global corporate loan transactions since the 1980s.

Enable the Deal Analytics App

FOR FIRST TIME USE ONLY

1. In the Thomson Reuters ribbon in Microsoft Excel, click Options then Apps.

You only see the apps you are entitled to use. Contact your Thomson Reuters representative to request additional access.

2. Click the Enable or Install button next to the DEAL ANALYTICS app.

3. When the button displays Restart Required, click OK.

To access training courses from FRONTLINE LEARNING:

1. Type TRAINING and Enter into the Eikon search box to open the Training app.

2. Search Eikon using keywords (e.g. ‘deal analytics’) and select OnDemand or Power Tip items from Autosuggest for direct navigation.

3. Visit training.thomsonreuters.com

To access the eLearning course which accompanies this PDF guide:

- Eikon: Retrieve Deals Information in Excel using the Deal Analytics App

4. Close all instances of Microsoft Excel, Microsoft Word, and Microsoft PowerPoint.

The Deal Analytics controls will be visible next time you start Excel.
Deal Screener

RETRIEVE A REPORT OF DEALS MATCHING SPECIFIED CRITERIA
The Set Up Screen tab

Clear / Open
Save / Save As
Select M&A, Equity, Bond, or Loan Deals
Shows number of deals matching defined filters

Add popular filters,...
...search for fields using Autosuggest,...
...or click the down arrow to open the Data Item lookup box

Run Screen to view results

The View Results tab: Table

Switch between Table and Scatterplot views.
Create a dynamic ‘TF’ function to return screen results in Excel
Multi-select deals using Ctrl...
...and save to a watch-list.

The View Results tab: Scatterplot / Bubble Chart

Set the axes to a wide range of scalar fields.
- Select all objects
- Reset zoom
- Add trend-lines
- View as cluster heat-map

Mouse-over deal to view details
Use right-click menu to:
- exclude from table
- view tearsheet
**League Table**

**RETIRE A LEAGUE TABLE OF TOP FINANCIAL ADVISORS**

New League Table: Aggregation tab

- Rank by deal value or number of deals
- Segment by industry, region, or date
- Exclude or include deal types such as Debt Tender Offers and Loan Modifications
- Open the multi-select dialog box
- Current selection(s)

**Volume Analysis**

**RETIRE DEALS DATA AGGREGATED BY TIME PERIOD TO ANALYZE M&A TRENDS**

For example, count deals per year with a specified target nation.

Select Open Volume Analysis from the dropdown to access your previously saved screens, and over 100 pre-built templates.

Select Excel chart type Scatter with Smooth Lines to preserve the scale on both axes, and clearly plot deal volume trend.

**Quick Tips!**

A. Right-click on a deal number and select Deal Tiersheet(s) from the Thomson Reuters sub-menu to view detailed deal information.

B. Select several deal numbers and select Save to list to create a new Watchlist or add to an existing one.

**TF Function Recalculation Methods**

Turn on/off Auto Calculation for TF functions only, including Deals Analytics formulas. If on, formulas are evaluated after creation, and re-evaluated on file-open.

Refresh all Eikon - Microsoft Office data retrieval functions in all workbooks, active workbook, active worksheet, or selection.
Estimated Deal Fees

OVERVIEW

Thomson Reuters delivers investment banking imputed fee content through Thomson Reuters Eikon.

This fee content coupled with Thomson Reuters’ transaction content and analytical tools offers you the ability to thoroughly understand investment banking deal flow and the fees they generate.

Estimated deal fees are populated for all M&A, Equity, Debt, and Syndicated Loans transactions since 1998.

Backwards Compatibility

SAVE AS VALUES

Store the results of your TF functions by taking a values only copy of the workbook or worksheet. This does not influence other Eikon - Microsoft Office Excel functions.

TF FUNCTION

Are you upgrading from TRMSO or Thomson ONE (TRSL)?

Activating the Deal Analytics app means your TF functions keep working with Thomson Reuters Eikon.

ADD IMPUTED FEES TO YOUR DEAL REPORT

1. Click the Build Report button in the View Results tab of the Deal Screener.
2. Click Add report items.
3. Search the Advisor Info folder for imputed.

Refer to the Eikon ON-LINE HELP for further information:

Visit financial.thomsonreuters.com/eikon

For more information, contact your representative or visit us online.

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