

Morningstar® DatAnalysis Premium

Financial Data Search Examples – Step-by-Step Guide

Example 1: Financial Search

Find fast growing stocks at a reasonable price that meet the following criteria:

- I** Operating revenue growth of more than 5%, over the last three years.
- II** Grown earnings of more than 20% per annum over the past three years.
- III** Consensus earnings estimate growth of more than 15% over the next 2 years.
- IV** EBITDA margin greater than 25%
- V** Price/earnings below 20 times.

Process

Section A

Search Scope:

- ▶ Listed Companies only

Current Financial Search

Section A (Optional)

Search Scope:

- Listed Companies only
- Delisted Companies only
- All Companies
- Specific Companies [Code Lookup](#)

(To add multiple codes, separate them by comma)

Section B

To determine which Section to select, it may first be necessary to click on "find a field". For example, click on "find a field" and type in "operating revenue". You will see a number of hits and then select "Annual Growth 3 year"

I

1. Section
 - ▶ Annual Growth 3 Year
2. Sub-section
 - ▶ Operating Rev.
3. Option
 - ▶ Greater than
4. Value
 - ▶ .05
5. Add Query

Section B

1. Section: [Find a field](#)
Annual Growth 3 Year
2. Sub-section
Operating Rev.
3. Option
Greater than
4. Term(s) or Value: [Field Tips](#)
 .05
5. Add Query
Repeat steps 1-5 for additional queries
[Add Query](#)

Section C

Query List:

Annual Growth 3 Year - Operating Rev. > .05

[Edit Field](#) | [Clear Field](#) | [Clear List](#)

[Search](#) [Clear Search](#)

II

1. Section
 - ▶ Annual Growth 3 Year
2. Sub-section
 - ▶ EAT
3. Option
 - ▶ Greater than
4. Value
 - ▶ 0.2
5. Add Query

Section B

1. Section: [Find a field](#)
Annual Growth 3 Year
2. Sub-section
EAT
3. Option
Greater than
4. Term(s) or Value: [Field Tips](#)
 0.2
5. Add Query
Repeat steps 1-5 for additional queries
[Add Query](#)

Section C

Query List:

Annual Growth 3 Year - Operating Rev. > .05
Annual Growth 3 Year - EAT > 0.2

[Edit Field](#) | [Clear Field](#) | [Clear List](#)

[Search](#) [Clear Search](#)

Example 1: Financial Search (continued)

III

1. Section
 - ▶ Forecasts
2. Sub-section
 - ▶ EPS 2yr. avg. forecast growth
3. Option
 - ▶ Greater than
4. Value
 - ▶ 0.15
5. Add Query

<p>Section B</p> <p>1. Section Find a field</p> <p>Forecasts</p> <p>2. Sub-section</p> <p>EPS 2 yr. avg. forecast growth</p> <p>3. Option</p> <p>Greater than</p> <p>4. Term(s) or Value Field Tips</p> <p>0.15</p> <p>5. Add Query</p> <p>Repeat steps 1-5 for additional queries</p> <p>Add Query...</p>	<p>Section C</p> <p>Query List:</p> <p>Annual Growth 3 Year - Operating Rev. > .05 Annual Growth 3 Year - EAT > 0.2 Forecasts - EPS 2 yr. avg. forecast growth > 0.15</p> <p>Edit Field Clear Field Clear List</p> <p><input type="button" value="Search"/> Clear Search</p>
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IV

1. Section
 - ▶ Annual Ratio Analysis
2. Sub-section
 - ▶ EBITDA Margin
3. Option
 - ▶ Greater than
4. Value
 - ▶ 0.25
5. Add Query

<p>Section B</p> <p>1. Section Find a field</p> <p>Annual Ratio Analysis</p> <p>2. Sub-section</p> <p>EBITDA Margin</p> <p>3. Option</p> <p>Greater than</p> <p>4. Term(s) or Value Field Tips</p> <p>0.25</p> <p>5. Add Query</p> <p>Repeat steps 1-5 for additional queries</p> <p>Add Query...</p>	<p>Section C</p> <p>Query List:</p> <p>Annual Growth 3 Year - Operating Rev. > .05 Annual Growth 3 Year - EAT > 0.2 Forecasts - EPS 2 yr. avg. forecast growth > 0.15 Annual Ratio Analysis - EBITDA Margin > 0.25</p> <p>Edit Field Clear Field Clear List</p> <p><input type="button" value="Search"/> Clear Search</p>
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V

1. Section
 - ▶ Price Sensitive
2. Sub-section
 - ▶ PER
3. Option
 - ▶ Less than
4. Value
 - ▶ 20
5. Add Query
6. Search

<p>Section B</p> <p>1. Section Find a field</p> <p>Price Sensitive</p> <p>2. Sub-section</p> <p>PER</p> <p>3. Option</p> <p>Less than</p> <p>4. Term(s) or Value Field Tips</p> <p>20</p> <p>5. Add Query</p> <p>Repeat steps 1-5 for additional queries</p> <p>Add Query...</p>	<p>Section C</p> <p>Query List:</p> <p>Annual Growth 3 Year - Operating Rev. > .05 Annual Growth 3 Year - EAT > 0.2 Forecasts - EPS 2 yr. avg. forecast growth > 0.15 Annual Ratio Analysis - EBITDA Margin > 0.25 Price Sensitive - PER < 20</p> <p>Edit Field Clear Field Clear List</p> <p><input type="button" value="Search"/> Clear Search</p>
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Example 2: Financial Search

Search the GICS Sector, Industrials and Listed companies only to determine:

- I The stocks that have posted the greatest increase in free cash flow over the past five years
- II What is their return on invested capital?
- III Display their debt to see if it has increased or decreased over this period.

Process

Section A

Search Scope:

- ▶ Listed Companies only

GICS Sector:

- ▶ Industrials

Section B



1. Section

- ▶ Annual Growth 5 year

2. Sub-section

- ▶ Free Cash Flow

3. Option

- ▶ Rank highest

4. Value (leave blank)

5. Add Query



1. Section

- ▶ Annual Ratio Analysis

2. Sub-section

- ▶ ROIC

3. Option

- ▶ Display only

4. Value (leave blank)

5. Add Query



1. Section

- ▶ Annual Growth 5 year

2. Sub-section

- ▶ Net Debt

3. Option

- ▶ Display only

4. Value (leave blank)

5. Add Query

6. Search

Section A (Optional)

Search Scope:

Listed Companies only

Delisted Companies only

All Companies

Specific Companies [Code Lookup](#)

(To add multiple codes, separate them by comma)

GICS Sector:

Industrials

Section B

1. Section [Find a field](#)

Annual Growth 5 Year

2. Sub-section

Free Cash Flow

3. Option

Rank highest

4. Term(s) or Value [Field Tips](#)

5. Add Query

Repeat steps 1-5 for additional queries

Section C

Query List:

Annual Growth 5 Year – Free Cash Flow Rank highest

[Edit Field](#) | [Clear Field](#) | [Clear List](#)

[Clear Search](#)

Section B

1. Section [Find a field](#)

Interim Ratio Analysis

2. Sub-section

ROIC

3. Option

Display only

4. Term(s) or Value [Field Tips](#)

5. Add Query

Repeat steps 1-5 for additional queries

Section C

Query List:

Annual Growth 5 Year – Free Cash Flow Rank highest

Interim Ratio Analysis – ROIC Display only

[Edit Field](#) | [Clear Field](#) | [Clear List](#)

[Clear Search](#)

Section B

1. Section [Find a field](#)

Annual Growth 5 Year

2. Sub-section

Net Debt

3. Option

Display only

4. Term(s) or Value [Field Tips](#)

5. Add Query

Repeat steps 1-5 for additional queries

Section C

Query List:

Annual Growth 5 Year – Free Cash Flow Rank highest

Interim Ratio Analysis – ROIC Display only

Annual Growth 5 Year – Net Debt Display only

[Edit Field](#) | [Clear Field](#) | [Clear List](#)

[Clear Search](#)

Example 3: Financial Search

Search peer group comparisons in the GICS Media Industry Group to find which stocks meet the following criteria:

- I** EBIT Margin greater than 20%
- II** Return on equity greater than 15%
- III** Display their PER
- IV** Display their dividend yield

Process

Section A

Search Scope:

- ▶ Listed Companies only

GICS Sector:

- ▶ Consumer Discretionary

GICS Industry group:

- ▶ Media

GICS industry:

- ▶ Media

Section A (Optional)

Search Scope:

Listed Companies only
 Delisted Companies only
 All Companies
 Specific Companies [Code Lookup](#)

(To add multiple codes, separate them by comma)

GICS Sector:

GICS Industry Group:

GICS Industry:

[List of GICS Industry Classification](#)
[More Information about GICS](#)

Section B



1. Section

- ▶ Annual Ratio Analysis

2. Sub-section

- ▶ EBIT Margin

3. Option

- ▶ Greater than

4. Value

- ▶ 2

5. Add Query

Section B

1. Section [Find a field](#)

2. Sub-section

3. Option

4. Term(s) or Value [Field Tips](#)

5. Add Query
Repeat steps 1-5 for additional queries

Section C

Query List:

Annual Ratio Analysis - EBIT Margin > 2

[Edit Field](#) | [Clear Field](#) | [Clear List](#)



1. Section

- ▶ Annual Ratio analysis

2. Sub-section

- ▶ ROE

3. Option

- ▶ Greater than

4. Value

- ▶ 15

5. Add Query

Section B

1. Section [Find a field](#)

2. Sub-section

3. Option

4. Term(s) or Value [Field Tips](#)

5. Add Query
Repeat steps 1-5 for additional queries

Section C

Query List:

Annual Ratio Analysis - EBIT Margin > 2

Annual Ratio Analysis - ROE > 15

[Edit Field](#) | [Clear Field](#) | [Clear List](#)

Example 3: Financial Search (continued)

III

1. Section
 - ▶ Price Sensitive
2. Sub-section
 - ▶ PER
3. Option
 - ▶ Display only
4. Value (leave blank)
5. Add Query

IV

1. Section
 - ▶ Price Sensitive
2. Sub-section
 - ▶ Dividend Yield
3. Option
 - ▶ Display only
4. Value (leave blank)
5. Add Query
6. Search

Example 4: Financial Search

Search the half yearly performance data of listed companies only, to determine:

- I Companies with market capitalisation greater than \$500 million
- II Companies which have posted the greatest increase in free cash flows over the last half year compared to the previous corresponding period.
- III Display days payables
- IV Display days receivables

Process

Section A

Search Scope:

- ▶ Listed Companies only

Section B

I

1. Section
 - ▶ Price Sensitive
2. Sub-section
 - ▶ Market Cap.
3. Option
 - ▶ Greater than
4. Value
 - ▶ 500m
5. Add Query

Example 4: Financial Search (continued)

II

1. Section
 - ▶ Interim Growth 1 year
2. Sub-section
 - ▶ Free Cash Flow
3. Option
 - ▶ Rank Highest
4. Value (leave blank)
5. Add Query

Section B

1. Section [Find a field](#)

Interim Growth 1 Year

2. Sub-section

Free Cash Flow

3. Option

Rank highest

4. Term(s) or Value [Field Tips](#)

5. Add Query

Repeat steps 1-5 for additional queries

Section C

Query List:

Price Sensitive - Market Cap. > 500000000

Interim Growth 1 Year - Free Cash Flow Rank highest

Edit Field | [Clear Field](#) | [Clear List](#)

[Clear Search](#)

III

1. Section
 - ▶ Interim Ratio Analysis
2. Sub-section
 - ▶ Days Payables
3. Option
 - ▶ Display only
4. Value (leave blank)
5. Add Query
6. **Search**

Section B

1. Section [Find a field](#)

Interim Ratio Analysis

2. Sub-section

Days Payables

3. Option

Display only

4. Term(s) or Value [Field Tips](#)

5. Add Query

Repeat steps 1-5 for additional queries

Section C

Query List:

Price Sensitive - Market Cap. > 500000000

Interim Growth 1 Year - Free Cash Flow Rank highest

Interim Ratio Analysis - Days Payables Display only

Edit Field | [Clear Field](#) | [Clear List](#)

[Clear Search](#)

IV

1. Section
 - ▶ Interim Ratio Analysis
2. Sub-section
 - ▶ Days Receivables
3. Option
 - ▶ Display only
4. Value (leave blank)
5. Add Query
6. **Search**

Section B

1. Section [Find a field](#)

Interim Ratio Analysis

2. Sub-section

Days Receivables

3. Option

Display only

4. Term(s) or Value [Field Tips](#)

5. Add Query

Repeat steps 1-5 for additional queries

Section C

Query List:

Price Sensitive - Market Cap. > 500000000

Interim Growth 1 Year - Free Cash Flow Rank highest

Interim Ratio Analysis - Days Payables Display only

Interim Ratio Analysis - Days Receivables Display only

Edit Field | [Clear Field](#) | [Clear List](#)

[Clear Search](#)

Example 5: Formula Search

Find stocks that currently have a current market capitalisation less than the value of cash assets plus property assets.

Process

Section A

Search Scope:

- ▶ Listed Companies only

Current Formula Search

Section A (Optional)

Search Scope:

Listed Companies only

Delisted Companies only

All Companies

Specific Companies [Code Lookup](#)

(To add multiple codes, separate them by comma)

Section B



- Section
 - ▶ Price sensitive
- Sub-section
 - ▶ Market Cap.
- Option
 - ▶ Less than
- Value

Value	Factor	Section	Sub-section
1	*	Annual Balance Sheet	CA Cash
	+		

Value	Factor	Section	Sub-section
1	*	Annual Balance Sheet	NCA PP&E

- Add Query

Section B

1. Section [Find a field](#)

Price Sensitive

2. Sub-section

Market Cap.

3. Option

Less than

4. Term(s) or Value [Field Tips](#)

Value	Factor	Section	Sub-Section
1	*	Annual Balance Sheet	CA Cash
	+		
1	*	Annual Balance Sheet	NCA PP&E

5. Add Query

Repeat steps 1-5 for additional queries

[Add Query](#)

List of Search Fields

Section C

Query List:

Price Sensitive - Market Cap. < (1 * Annual Balance Sheet - CA Cash) + (1 * Annual Balance Sheet - NCA PP&E)

[Edit Field](#) | [Clear Field](#) | [Clear List](#)



- Section
 - ▶ Annual Balance Sheet
- Sub-section
 - ▶ CA Cash
- Option
 - ▶ Display only
- Value (leave blank)
- Add Query

Section B

1. Section [Find a field](#)

Annual Balance Sheet

2. Sub-section

CA Cash

3. Option

Display only

Example 5: Formula Search (continued)



1. Section
 - ▶ Annual Balance Sheet
2. Sub-section
 - ▶ PP&E
3. Option
 - ▶ Display only
4. Value (leave blank)
5. Add Query
6. **Search**

Section B

1. Section [Find a field](#)
Annual Balance Sheet

2. Sub-section
NCA PP&E

3. Option
Display only

4. Term(s) or Value [Field Tips](#)

(Value Factor Section
Sub-Section)

(Value Factor Section
Sub-Section)

5. Add Query
Repeat steps 1-5 for additional queries
[Add Query](#)

[List of Search Fields](#)

Section C

Query List:

Price Sensitive - Market Cap. < (1 * Annual Balance Sheet - CA Cash) + (1 * Annual Balance Sheet - NCA PP&E)
Annual Balance Sheet - CA Cash Display only
Annual Balance Sheet - NCA PP&E Display only

[Edit Field](#) | [Clear Field](#) | [Clear List](#)

[Search](#) | [Clear Search](#)