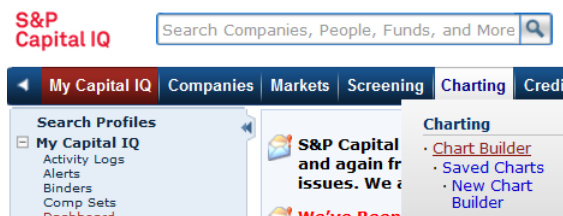


## Charting

### CHART BUILDER

To access Chart Builder, hover over the Charting tab at the top of the S&P Capital IQ platform and click Chart Builder.



The Chart Builder allows you to easily chart financials, market data, forward/trailing multiples, estimates, financial and growth ratios, macroeconomic data, fixed income data, interest rates, and many other metrics. You can customize chart templates, time frames, various annotations, technical analysis indicators, and historical estimates.

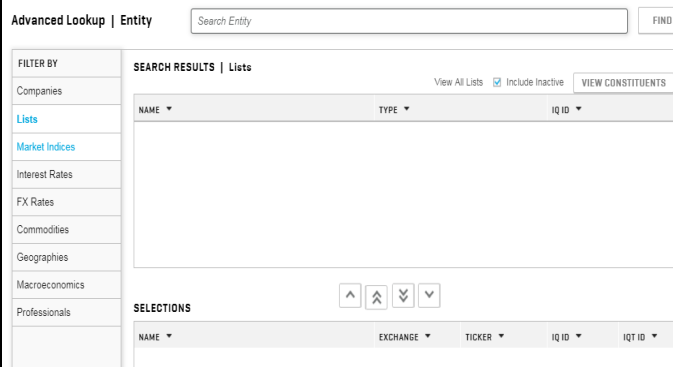
### ADDING AN ENTITY

To add companies, indices, custom indices, lists, commodities, geographies, professionals, or securities to your chart, type the name of the entity directly into the Entity textbox. A pop-up will provide choices. Select the entity you would like to add to your chart.



### ADDING MULTIPLE ENTITIES

To add multiple entities, add a primary entity first on Select Entity box with a metric selection followed by adding rest of the entities on the Compare tab. Select the type of entity (e.g., company, index, etc.) you would like to look up, and then type the name of the entity in the search box. A list of results will appear. Select the entity and click the Select button to add this to the Selections box. Once you have selected all your entities, you can choose to add the entities individually or create a custom index. Then, click the Apply button.

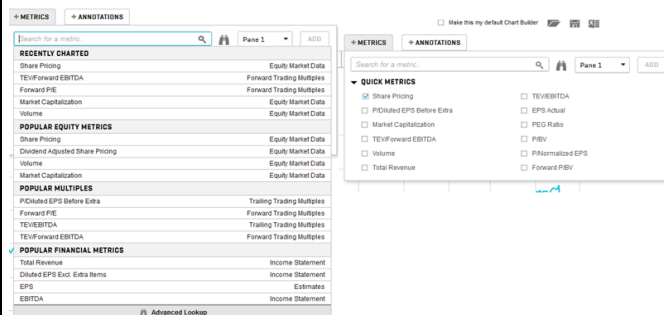


**Note:** If you know all of the tickers/identifiers of the entities you would like to chart, you can simply type them into the Entity box separated by commas.



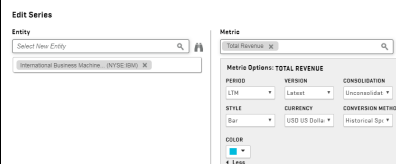
### CHOOSING A METRIC

Next, you can add a metric or multiple metrics for the entity/entities you have chosen. Type in the metric you would like to use and click the Add to Chart button. You can also use Advanced Lookup link at the bottom of Metric to search for metrics, or check off the metrics you would like to use in the Quick Metrics panel to the right of the charting area.



### ADVANCED OPTIONS

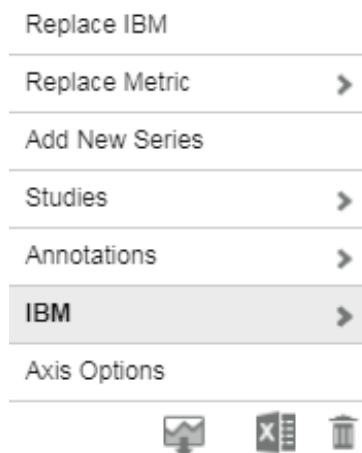
For more charting options, right click on the chart>>Metric>>Edit Series



- **Frequency:** Specify how often data points should appear on the chart (daily, weekly, or monthly).
- **Style:** Select between Line, Bar, Area, Circle, Square, HLC, or Candlestick.
- **Currency:** Specify the currency for your chart.
- **Currency Conversion Method:** Choose to see your chart at historical or today's spot rate.
- **Color:** Change the color of the charted entity metric.

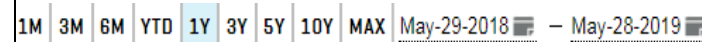
### SIDE PANEL

From the charting side panel, you can quickly add metrics, annotations, and entities to the chart queue, as well as change how your chart is displayed.



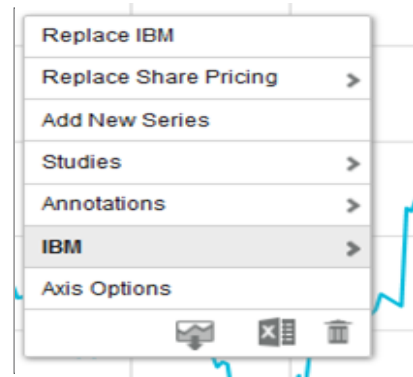
### TIME FRAME AND FEATURES

Click the time frame links above the chart to quickly change the chart's time frame. Use the custom time box to specify a custom time frame.



## EDITING CHARTS

To edit your chart, right-click on the chart and an edit menu will appear.



From this menu you can:

- Replace an entity or metric
- Perform technical analysis
- Add annotations or benchmarks
- Change the style of the chart
- Export to Excel or as an image
- Save charts
- Add axes
- Change the axis type
- Change the scale of each axis
- Change how numbers are displayed on the chart
- Change the format of the date
- Remove the chart

## CHART SUMMARY

You can edit an entity on an individual basis in the Chart Summary section. To do this, click the pencil icon button that is to the right of the entity you would like to change.



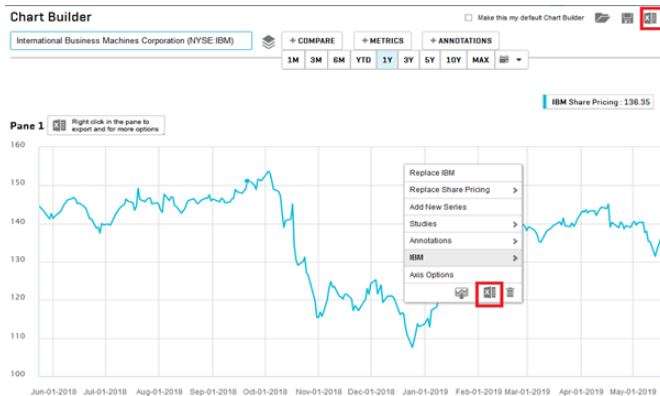
Here you can change an entity or metric, as well as frequency, style, currency, conversion method, name, or color. You can also remove the chart.

### Chart Summary

Panel 1									
NAME	BENCHMARK	INTRADAY PRICE	INTRADAY CHANGE	CHART STATISTICS: MAY-29-2018 TO MAY-29-2018					
				HIGH	LOW	AVG	CHANGE		
International Business Machines Corporation (NYSE:IBM)									
Share Pricing		130.45	-1.82   -1.38%	8.87	-23.83	-3.41	-7.62		
Ford Motor Company (NYSE:F)									
Share Pricing		9.78	-0.95   -9.51%	5.86	-33.30	-16.76	-14.51		

## EXPORTING CHARTS

To export a chart, go to the menu in the upper upper right hand corner of the chart.



If you export to Excel, you will get the chart in an Excel workbook as well as the back-end data for the chart. You can also export as an image, which will create a picture that you can place in presentations.

## SAVING CHARTS

You can also save charts from the top left menu by clicking on the Save Chart icon.



Once you click this, a pop-up will open. Choose whether you would like to save as a new chart or update an existing one, and name your chart. You can then specify an access level and add the chart to an album if you would like.

**Note:** Saving a chart captures the entities on the chart when it is saved. If there is an entity in the Subject Replaces dropdown, this will be replaced when opening the chart from a different profile. If there is no entity, the chart will always display the same subject(s).

## ALBUMS

Albums allow you to keep your charts organized within the S&P Capital IQ platform for future reference. To add a chart to an album, click the Add to Albums arrow when saving a chart. This will allow you to name your album and save it.

### Chart Builder | Save

NEW CHART UPDATE EXISTING CHART

#### CHART NAME

Enter chart name...

#### ACCESS LEVEL

Vineela Inala

ADD TO ALBUM

CANCEL

SAVE

## SAVED CHARTS AND ALBUMS VIEWER

The Saved Charts and Albums section has tabs for Recently Viewed charts, Saved Charts, Saved Albums, and Capital IQ Albums.

To open a chart or album from this section, simply click on the icon and the chart(s) will load. To view more than one chart or album on the same page, right click on each icon and click Add Chart to Page or Add Charts from Album.



Navigate by clicking the arrow buttons on the right and left of the icons.

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