

Bloomberg

Bloomberg Resources at WPI

Fall 2020

The Bloomberg Terminal



Bloomberg Market Concepts: BMC<GO>

- Self-paced e-learning course
- Visual intro to financial markets
- 4 Core Concepts modules + 4 a la carte modules
- 100+ Bloomberg functions
- 200+ knowledge checks
- Confers certificate of completion
- Optimal for Finance, Economics, Accounting, Business, Marketing courses

BMC Certification Courses

Economic Indicators

Currencies

Fixed Income

Equities

Additional BMC Courses

Terminal Basics

Portfolio Management

Stock Options

Commodities

Sept 15
2020

Certificate of completion

11 May 2019

This is to acknowledge
that **HUILIN XIONG**
has successfully completed
Bloomberg Market Concepts.

BMC
Bloomberg Market Concepts

Bloomberg
for Education

Portfolio Management



At the end of this course, students will be able to

- Describe the role of a portfolio manager
- Generate ideas and perform extensive research on investment ideas for a portfolio
- Create a portfolio using screening tools
- Use PORT to analyze historical performance and risk metrics
- Use PORT to evaluate future risk and opportunities for a portfolio

Submodule 1: Defining a Portfolio Manager

- Describe the difference between value, growth, and GARP investment strategies
- Explain how an active manager differs from a passive manager
- Explore the investment process from screening to investment allocation
- Discover the challenges an asset manager experiences

Submodule 2: Generating Ideas

- Screen for securities
- Simulate strategies by exploring their historical performance via backtesting
- Research companies for inclusion in a portfolio strategy

Submodule 3: Building an Equity Portfolio

- Create a multi-factor scoring model to rank companies on fundamentals
- Describe the different position types of a portfolio
- Build a portfolio using Excel and PRTU

Submodule 4: Analyzing a Portfolio

- Explain the importance of portfolio analysis
- Describe how to use the tabs in PORT function for portfolio analysis
- Use analysis to make portfolio adjustments

Submodule 5: Assessing Portfolio Risk

- Determine how much your portfolio's return deviates from the benchmark's return
- Identify the riskiest securities in your portfolio
- Analyze how your portfolio would perform in times of stress or change

BMC Interactivity

BMC
Bloomberg Market Concepts
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Outline Transcript

- Introduction
- Your mandate
- Price-to-earnings ratio
- Dividend yield
- Price-to-book ratio
- Equity research
- EQS: Equity Screening
 - Question
 - Question
 - Question
 - EQBT: Equity backtesting
 - Backtesting results
 - WATC: Watchlist analytics
 - DES: Security Description
 - CN: Company news
 - BI: Bloomberg Intelligence
 - FA: Financial Analysis
 - Company analysis
 - Relative valuation
 - EQRV
 - GF: Graph fundamentals
 - The war room
 - TMSG: Team Message
 - Section quiz
 - Summary

1 <G0> for Results, 89 <G0> to see last unsaved screen

97 Formula 98 Actions 99 Backtest Equity Screening
As Of 04/26/2019

My Recent Screens

- 10 Project BMC44
- 12 Winning Ideas
- 13 BMC Growth Strategy
- 14 Large Cap Growth
- 15 Test BMC
- 20 All Saved Screens

Popular Screens

- 20 Global Infrastructure
- 22 High CDS Spreads
- 23 Insider Buyers
- 24 Quality Screen
- 25 SZSE SHK Northbou...
- 26 Value Screen
- 30 More Screens

Value Screen

Screening Criteria

- 30 Exchanges
- 32 Sectors
- 33 Country of Domicile
- 34 Indices
- 39 Portfolios/Monitors
- 43 More Categories

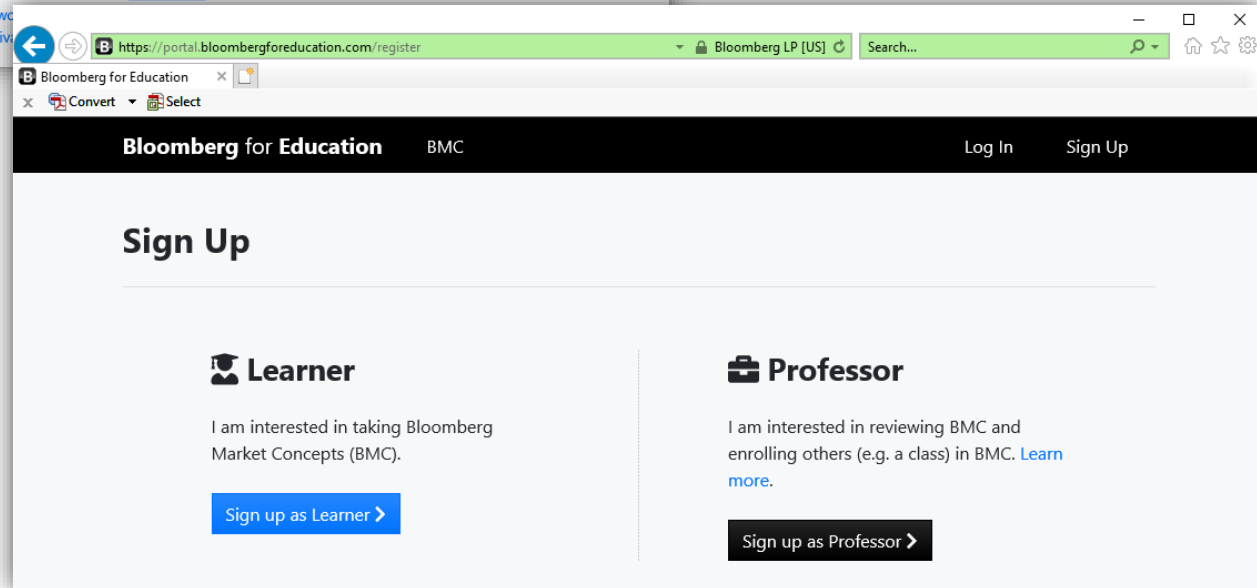
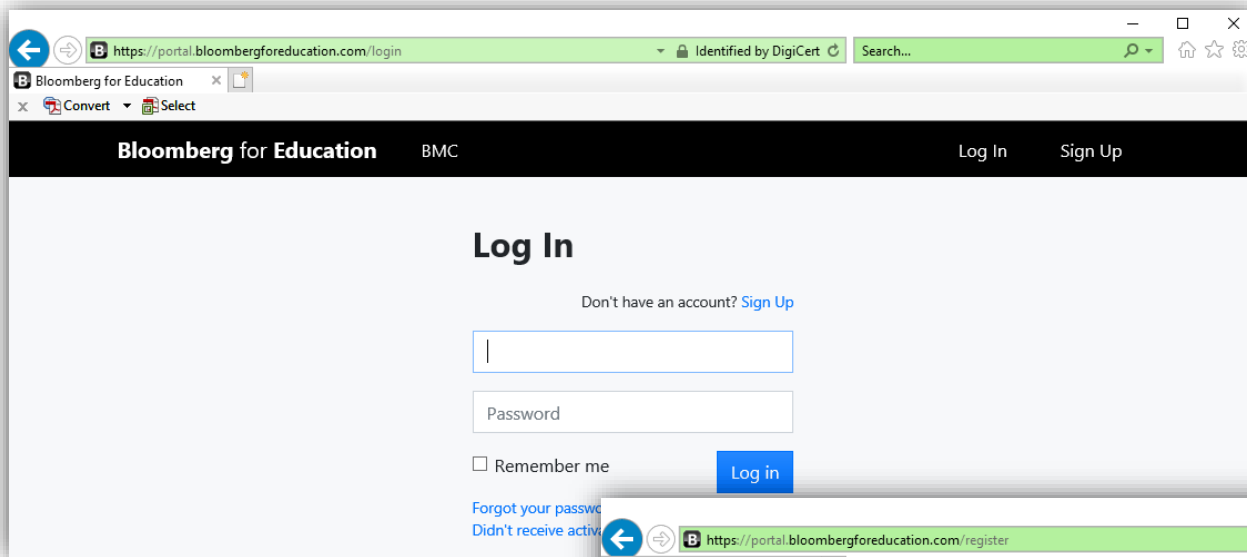
Add Criteria


Selected Screening Criteria	Matches
Security Universe	1086623
50 Trading Status: Active	349255
52 Security Attributes: Show Primary Security of company only	71329
53 Country of Domicile: United States	12205
54 Current Market Cap > 20000 Million	340
59 Current Price Earnings Ratio (P/E) < 15	86
56 Current Price to Book Ratio >= 1	74
57 Current Dividend Yield >= 2.5	42
58 Add screening criteria	

Let's say you want to adjust the market cap in your EQS search to increase the number of matches. What should you click to do this most efficiently?

Where can you take the BMC?


<https://portal.bloomberforeducation.com/>









Bloomberg for Education **BMC** Case Studies Terminal Access 

Bloomberg Market Concepts


Bloomberg Market Concepts (BMC) is a library of e-learning courses that provides an introduction to the financial markets. By taking BMC, you will learn about the financial markets via 35 learning outcomes, familiarize yourself with over 100 Bloomberg terminal functions, solidify your knowledge with over 160 interactive questions.

Class Enrollments  Add Class

You are not enrolled in any classes.

ALL COURSES	REQUIRED FOR CLASS	REQUIRED FOR CERTIFICATE
 Economic Indicators  Not Started Discover the regiment upon which economic indicators are published and analyzed.		
 Currencies  Not Started Explore the history and mechanics of currency markets.		
 Fixed Income  Not Started Discover the bond market and all of its unique complexities.		

Bloomberg Certificate



To earn the Bloomberg Certificate, you must complete all courses with the certificate icon.

Course Summary

Economic Indicators	Not Started
Currencies	Not Started
Fixed Income	Not Started
Equities	Not Started
Terminal Basics	Not Started
Portfolio Management	Not Started

New BMC Modules Coming September 15, 2020!



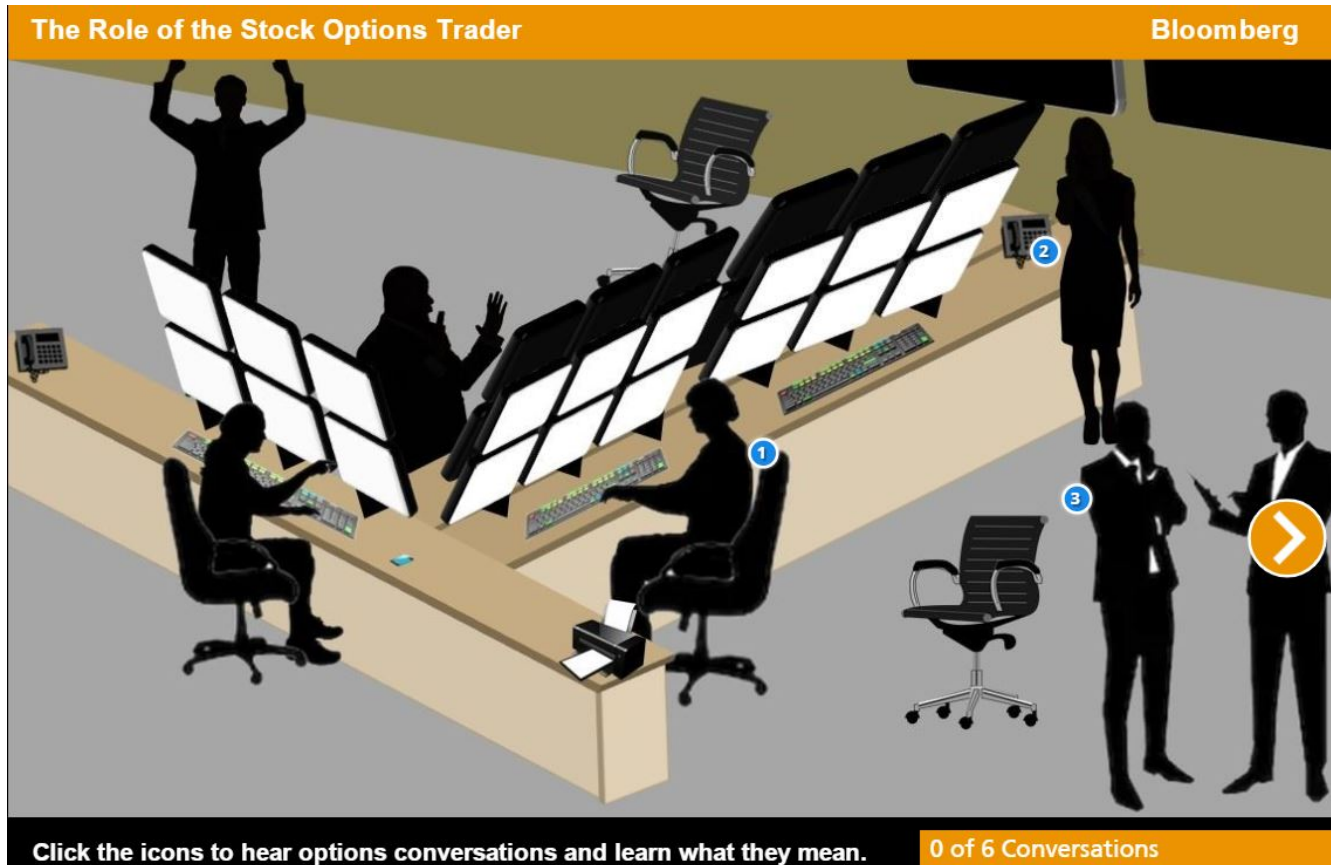
BMC Stock
Options

BMC
Commodities



BMC Stock Options

The Role of the Stock Options Trader Bloomberg



Click the icons to hear options conversations and learn what they mean. 0 of 6 Conversations

BMC Stock Options



BMC Stock Options

Using the Language of the Options Market **Bloomberg**



i

Select any of the terminal screens on the monitors to practice using options terms and concepts.

New BMC Modules Coming September 15, 2020!



BMC Stock Options

BMC Commodities



BMC Commodities

LIVE

Bloomberg **BREAKING NEWS** **LIVE** **BREAKING NEWS** **BREAKING NEWS**

CRISIS IN SAUDI OIL FIELD NOW DISAPPEARING

The effects of the drone attack are disappearing and the oil field is starting to produce at full capacity again.

Oil prices are now decreasing and going back to a pre-crisis level.

Additionally, to compensate - OPEC announced they would increase their production quota.

OPEC

BMC Commodities

Research on the Terminal

U.S. Weekly Sales Growth Falls to 2.5% in 2018

Back to Safety, WTI to Rise to \$60

Select a strategy:

I am going to hedge

I'm not going to hedge

Click the screens to do your analysis. Then select a strategy.

SMNR<GO>



The screenshot displays the Bloomberg SMNR<GO> interface. At the top, there is a navigation bar with various function keys (GO, F1-F4, PRINT, HELP, MEMO, SEARCH, QUOTE, MONIT, NEWS, MSG, MENU, PG BA, PG FW, Survey, Educat, Down, Studen, Not Ap, 1) Save, MENU, DRQS). Below this is a breadcrumb trail: < > APPLE INC Equity > SMNR > Related Functions Menu >. A message icon and 'Message' text are also visible.

A green arrow points to the 'Search' button in the top navigation area. Below the navigation bar, a notification states: 'Please note that dates default to your local time'. The main content area is titled 'Bloomberg Seminars and Events' and is divided into three sections: 'Webinars & Events', 'On-Demand', and 'Live Now'. Each section has a 'View All >' link.

The 'Webinars & Events' section features a card for 'Industrial Sector Outlook for Investor Relations and Strategists' by Bloomberg, scheduled for 8/17 10:00-11:00, with a 'Register' button.

The 'On-Demand' section features a card for 'Tips & tricks to the Terminal: Managing your Launchpad views', which is 2 minutes long, with a 'Register' button.

The 'Live Now' section indicates 'No current events. Next event: Module 3: Introduction to Python, BQuant, BQL' scheduled for 8/11 22:30-23:30, with a 'Register' button.

Below these sections is a navigation bar with tabs for 'All', 'Webinars & Events', 'On-Demand', and 'Schedule'. The 'Schedule' tab is selected, showing a view for the 'Week of Aug 10 - Aug 16'. A language dropdown menu is set to 'All Languages'.

The schedule lists the following events:

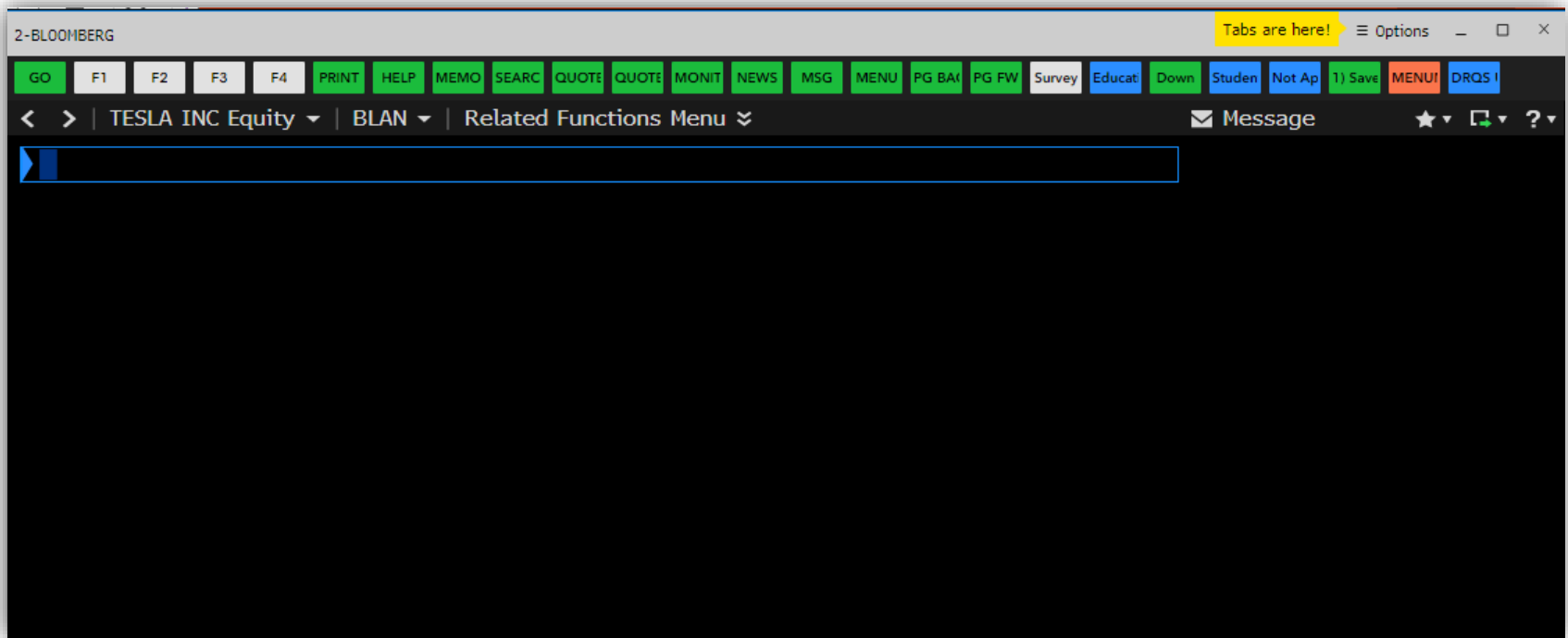
- 22:30 - 23:30 Today: Module 3: Introduction to Python, BQuant, BQL. *** Buyside Only***... Register
- 23:00 - 00:00 Today: [원격 웹 세미나]블룸버그 기초교육. *웹 세미나로 진행됩니다 아래의 링크로 접속하신 후 패스워드를 입력해야 하는 경우 ... Register
- 23:00 - 00:00 Today: Idea Generation & Back Testing. This course is designed to introduce Bloomberg Equity Functionalities. It will cover:... Register
- 00:00 - 01:00 Aug 12: Introduction to DLIB | Cross-asset | Risk. This is a webinar training on DLIB <GO> and it will be hosted on Nexi. ... Register

Bloomberg Intelligence

The screenshot displays the Bloomberg Intelligence terminal interface. At the top, there is a navigation bar with function keys (GO, F1-F4, PRINT, HELP, MEMO, SEARCH, QUOTE, MONIT, NEWS, MSG, MENU, PG BAI, PG FW, Survey, Educat, Down, Studen, Not Ap, T) Save, MENU!, DRQS!) and a search bar containing "APPLE INC Equity". Below the navigation bar, the main content area is divided into several sections:

- Actions & Settings:** Includes "Events & Chatrooms", "Settings", and "Bloomberg Intelligence".
- Search & Popular Searches:** Shows a search bar with "Search BI Research and Data" and "Popular Searches Coronavirus, China, 5g".
- Featured Research:** A list of 6 research items:
 - 1) Big Oil Recovery Pains
 - 2) IPOs are Global Bank Bright Spot
 - 3) Pre-Call Refis Attractive Amid Funding Cost Declines
 - 4) Auto Suppliers Will Look Worse Than Great Recession
 - 5) Microsoft Better Off If Private Equity Buys TikTok
 - 6) U.S. Countercyclical Capital Buffer
- Suggested BI:** A section with a dropdown menu set to "All Regions", containing:
 - Suggested Key Data | More »**
 - 7) ☆ IDC Mobile Phone Value (\$M): Quarterly Data Update 12:00
 - 8) ☆ IDC Global Mobile Phone Shipments (Units): Quarterly Data Update 12:00
 - 9) ☆ IDC Global Smartphone Value (\$M): Quarterly Data Update 12:00
 - 10) ☆ IDC Global Smartphone Shipments: Quarterly Data Update 12:00
 - 11) ☆ IDC Global Smartphone Average Price: Quarterly Data Update 12:00
 - Suggested Research | More »**
 - 12) Cineworld May Not Be Immediate Target After Decree Scrap: React 13:23
 - 13) Uber, Lyft Loss on California Law Only First Bump on Rocky Road 10:30
 - 14) BioNTech Covid-19 Vaccine Data Still the Focus: Earnings Outlook 10:18
 - 15) Onpattro Aids Alnylam's Spending as Cash Burn Keeps Intensifying 09:21
 - 16) Despite Intense Spending, BeiGene Is Flush with Cash Amid Raise 09:18
 - 17) Cash Pile, Proprietary Pipeline Among Pluses for Turning Point 09:03
 - 18) Turning Point Could Be Attractive Target If Data Stay Positive 09:03
 - 19) All Eyes on Key 2H Turning Point Clinical Data: Company Outlook 09:03
 - 20) Taming Big Tech Via U.S. Antitrust Law an Uphill Task: BI Basics 08:09
- Equity IPO Volume:** A bar chart titled "Spotlight | More » Equity IPO Volume" showing IPO volume from July 2018 to July 2020. The y-axis is labeled "IPO VALUE (\$ MIL)" and ranges from 0 to 440,000.
- Navigation & My BI:** On the left, there is a "Browse All of BI" menu with categories like Industries (Communications, Consumer Discretionary, etc.), My BI, and Suggested BI Dashboards (Biotech, Internet Media, Mobile Phones).

Use the Terminal's Command Line Autocomplete/AI



Prepare for a Career

Get ahead with the Bloomberg community

- Apply for entry-level jobs posted on our job board by our 300,000+ users
- Find and network with alumni and others on the Terminal using our people finder tools

Source companies that you want to work for using our equity search tools

- Sort by hundreds of fields, including market cap, market activity, and revenue
- Find companies that match your environmental, social, and governance values on our ESG dashboard
- Search for state and federal jobs by exploring government agencies and directories with our government functionality

Take the Bloomberg Market Concepts course

- Understand how the markets work
- Put the certification on your resume and on LinkedIn to appear in automated company resume searches

Prepare for interviews

- Research companies and industries to get smart on the business using our Bloomberg Intelligence dashboard
- Learn how what is happening in the markets right now affects your desired career



Bloomberg

Experiential

Learning Partner