

**Bloomberg Instructions for
Bloomberg Market Concepts (BMC)
Certification Program**

Fin 409 Modeling and Valuation
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The purpose of this teaching tool is to introduce you to Bloomberg and where the Bloomberg terminals are on campus; share the Bloomberg Market Concepts Course and teach you to how to log in, see the videos, and take the exams; and introduce you to a the Bloomberg template library.

Introducing Bloomberg

Bloomberg is a good source of information and news that drives decision making in the business and investment world. Bloomberg is a source of real-time and historical financial news and information for central banks, investment institutions, commercial banks, government offices and agencies, law firms, corporations and news organizations in over 150 countries.

Bloomberg is a good tool that helps gather and manipulate information—if you know how to use it. Learning to utilize it well will not only help you excel in your classes, but it will also equip you with powerful information for your job search and career. The Certification Process is a start at becoming even more proficient at Bloomberg. In addition, once you finish the Bloomberg Essentials Certification, you will show me that you can utilize these tools by completing a project that you can share with later classes.

Locating Bloomberg Terminals

As students of BYU we are lucky to have access to a several Bloomberg terminals. There are ten Bloomberg terminals in room W247 of the Tanner Building (the computer password is “kimsmith”. You are welcome to go and use these terminals. This is the best place for students to access Bloomberg.

There is another terminal located on the first floor of the Harold B. Lee Library next to the Management/Economics reference desk (Social Sciences) which you can also use.

Bloomberg Market Concepts Course

The Bloomberg Market Concepts Course has been designed to equip financial professionals with a comprehensive knowledge of Bloomberg to help you accomplish your professional responsibilities. You will participate in classes to improve your knowledge of and proficiency with the Bloomberg service. This is an investment in yourself which is done outside of the regularly scheduled class.

Getting a Bloomberg Login

Each individual is REQUIRED to have their own Bloomberg login in order to participate in the BMC course.

To create a login, hit the red default key and then <Go> (the enter key). Follow the prompts to create a log in. It will bring you to the login screen. Leave the login name blank and hit <Go>. Fill in the information including language, first name, last name, new password, and re-enter new password. Then type <1> in the upper left corner to continue.

You will need a validation code that Bloomberg will send you. Generally, use an SMS text message. Type in your cell phone number and type <1> to send the code. Bloomberg will send you a text message to your phone number you typed in. You will receive it on your cell phone and type it into the screen where it says "Validation Code." It may take up to a few minutes to get the code so be patient (it took me 5 minutes). You will be taken to a registration screen, where you'll be prompted to fill in additional information. Fill in the required fields (they will be highlighted in amber) and any other fields if you would like to. Hit the <1> complete registration in the upper left corner to continue; you've now created your login.

Log on using your new login and password. It will ask you for our country/region for suggested defaults, and type "US" and hit enter. You will need to add your time zone (Mountain). Type "?" into the box and hit enter to view the choices for the time zone. When done, check to make sure that everything else is correct (default currency, language, etc...) type <1> to store your defaults.

Sign Up for the Curriculum

Once logged into Bloomberg with your individual log in, type BMC<Go> and then click on "Sign Up". Fill in your name, email, and set a password that you will remember. Read and Click on that you have read the terms of service. Click on "Sign Up." Enter the activation code received in your email, and then you will be given one year access to all four modules.

Click on "Access Course" to watch online interactive video seminars for each course. There are four different sections to this course: Economic Indicators, Currencies, Fixed Income, and Equities.

For the purposes of this class, you will need to complete watching the videos for each of the modules, and finish answering all 120 assessment questions through the four modules. Sadly, there is no required score to complete the course.

Getting Your Certificates

Upon completion of the courses, you will be able to download your "Certificate of Completion". Please print it off and hand it in at the end of class.

Bloomberg Template Library

One of the best tools on Bloomberg is the Excel-based templates they provide. They provide hundreds of templates that you can import into Excel. Instead of writing your tools from scratch, you can find a template that does something similar to what you want, and then make adjustments to that template to accomplish your task.

To access the templates, go to the Bloomberg terminal and open Bloomberg. Then login to Bloomberg.

Go open Excel. When you go into Excel, you should see the Bloomberg tab to the right of the Developer tab. If you do not see it, you will need to install this Bloomberg Add-in.

Problem Solving: Installing the Bloomberg Add-in

To add this, click on File, Options, Add-ins, and Manage Excel Add-ins. Click on [Go]. Make sure the Bloomberg Excel Tools Add-in is checked. If so, click on OK and you are done.

If not, click on Browse, and on my computer (it may be different on other Bloomberg computers), go to the main hard drive, BLP, API, Office Tools, and click on the file *BloombergUI.xla*. Click on Insert, and you should see it on your list of Excel Add-ins with a check in the box. Click on OK, and it should bring you back to the spreadsheet.

To access the templates, click on the Bloomberg tab, then Template Library. It may take a few seconds to bring up the templates. Note that they have templates on different categories, such as Tutorials, CDS, Commodities, Currencies, Derivatives, Economics, Equity, Fixed Income, and other types. Click on the type of templates you are interested in by left-clicking on the “+” in front of the category.

Template Example

For example, suppose you are looking for a template for detailed financial information by company. Click on Equity, and now notice that they have other categories as well. Let’s look at the Fundamentals, and left-click on the “+” in front of this category. Look for the template “Bloomberg Company In-depth Analysis,” put the cursor on this template and click on “Open.” It will import this template into your spreadsheet.

Now, if you type in the Company Ticker in this template in cell E5, it will bring in all the data for your company, compute the ratios, redo the graphs, and help you with the analysis. Notice that there are tabs for Overview, Peers, Indices, Financials, Ratings, Brokers Earnings Estimates, Valuation and Owners. Not bad for a few minutes work.

I hope this tutorial is helpful. Bloomberg is a good tool that you can use as you navigate this wonderful world of finance.

