

Finance Resource Guide

<u>Library Databases</u>	<u>Mutual Funds, Hedge Funds, and Pension Funds</u>	<u>International Finance</u>
<u>General</u>	<u>Stock Markets</u>	<u>Data</u>
<u>Annual Reports and Filings</u>	<u>Commodities/Futures</u>	<u>Education and Research</u>
<u>Stocks and Bonds</u>	<u>Banking</u>	<u>Selected Print Resources</u>

This guide provides selected information resources in the field of Finance. Included in this guide are the Mildred F. Sawyer Library subscription databases, selected web resources, and a brief list of print resources. For information resources covering economics, accounting, and tax, see the Mildred F. Sawyer [Economics Resource Guide](#), the [Accounting Resource Guide](#), and the [Tax Resource Guide](#). For specific book and periodical titles, check the [Suffolk University Library Catalog](#).

Library Databases

The Sawyer Library subscription periodical indexes and full-text resources are available to currently registered Suffolk University students only.

[Mergent Online](#)

Mergent Online provides financial information for over 15,000 U.S. public companies and 20,000 non-U.S. companies (active and inactive). Allows multiple company reports, 15-year balance sheets and income statements, institutional holdings, FactSheets, equity reports, Profitability Ratios, company history, news, and much more. It includes access to SEC filings

through EDGAR, seven years of annual reports, plus Portraits, which provide in-depth industry analysis and commentary, financial data, and a review of a company's investment potential. Also, Mergent allows for user-defined company comparison reports. International company data includes annual reports, company financials, business history, industry reports, and more. The Sawyer Library has only three licenses for simultaneous use of Mergent Online. When ending a session, PLEASE choose "Logout."

[LEXIS/NEXIS Academic](#)

Provides full-text searching of newspapers, trade journals, wire services, and transcripts of broadcasts. Business, legal, and biographical sources are included. Major newspaper coverage generally starts in the late eighties or early nineties. For company information, select the "Business" tab and then choose from the options within the left-hand column. "Company Dossier" covers over 43,000,000 companies and includes downloadable financial information, stock reports, supplied by various research groups, corporate hierarchies, legal information, and more. For searching in accounting literature, choose the "Business" tab, then choose "Accounting" from the left column. The database accounting literature includes AICPA publications, GAAS and GAAP Guides, accounting journals, and more. Choose "Legal" tab, then Choose "Tax Law" from the left column, in order to search tax journals, state and federal tax cases, Treasury regulations, the Internal Revenue Code, Cumulative Bulletin, and more.

[S & P NetAdvantage](#)

Stock Reports provide data, analysis, and projections for publicly held U.S. corporations. The Stock Report for each company includes the latest share price, current year's range, P/E ratio, current dividend and yield, and S&P's proprietary earnings and dividend rankings. It also offers stock charts showing six to seven years of monthly stock price ranges plus a 10-year summary of per-share data and tables of income and balance sheet data. Bond Reports are also available. Company Profiles provide history and directory information. Corporate Records allows the creation of a user-defined screener for selecting stock information. Options include industry sector, S & P ranking, price-per-share, earnings, and more. Industry Surveys offers the full-texts of the print version of *Standard & Poor's Industry Survey*.

[Value Line Research Center](#)

Covers 1,700 equity issues and provides year-ahead and three-to-five year probable price performance, projections of key financial measures, plus commentary on current operations and future plans. Allows multiple stock screening based on user-defined criteria; current industry reviews in PDF format; timeliness and performance rank changes; user-customized profile summary reports; weekly texts of the "Ratings & Reports," the "Selection & Opinion," and the "Summary & Index," found in the print edition.

[Hoover's Online](#)

Provides detailed company information, including business history, financial information, stock data, competitors, SEC filings and much more. Allows the creation of user-defined company reports in PDF.

[Morningstar Investment Research Center](#)

Morningstar Investment Research Center is an investment resource specializing in fund evaluation. It provides detailed analyst guidance on 1,900 stocks and 2,100 funds.

[Mergent WebReports](#)

Mergent WebReports allows access to an archive of more than 180,000 documents ranging back to the early 1900s, covering over 100 countries and industries. The collection is searchable by company name, year or manual type.

[eStatement Studies \(RMA\)](#)

eStatement Studies is the online version of the RMA Annual Statement Studies which provides composite performance metrics derived directly from the financial statements of financial institutions' borrowers and prospects.

[D&B Key Business Ratios](#)

This database determines solvency, efficiency and profitability ratios.

[IMF Statistical Databases](#)

The IMF database includes a range of time series data on IMF lending, exchange rates, and other economic and financial indicators. Included are: International Financial Statistics (IFS), Balance of Payments Statistics (BOP), Direction of Trade Statistics (DOT), Government Finance Statistics (GFS). The database contains some time series data as far back as 1948.

[Business Source Complete](#)

Provides indexing and abstracting for the most important scholarly business journals, including the full-text of the Harvard Business Review back to 1922. Non-journal content includes financial data, books, conference proceedings, case studies, investment research reports, industry reports, market research reports, country reports, company profiles, SWOT analyses, and more. Covers nearly every area of business, including economics, finance, management, and international business.

[General BusinessFile ASAP](#)

Provides abstracts and articles from magazines, journals, and investment analysts' reports on major companies, industries, economics, and business. Coverage is from 1980 to the present. To access the Company ProFiles, choose the advanced search, then Company ProFiles, then select company name from the drop-down box. The profiles include basic directory information and links to articles about the company's finances, strategic ventures, products and technology, and the overall industry.

[Wall Street Journal](#)

Provides abstracts and full-text articles. Abstracts available from 1984 to date.

[EconLit with Full Text](#)

The American Economic Association's database, which provides indexing and abstracting of international economic literature. It corresponds to the print Journal of Economic Literature and covers books, journal articles, working papers, dissertations, and conference proceedings. Includes full text for more than 430 journals. Coverage is from 1969 to present.

[NBER Working Papers](#)

The National Bureau of Economic Research (NBER) is a private, nonprofit, research organization. It produces and distributes unbiased economic research to policymakers, business professionals, and the academic community. The database provides searchable full-text working papers.

[JSTOR](#)

JSTOR is a full-text collection of back issues of core scholarly journals. It includes over 50 business, finance, and economic journals.

[STAT-USA](#)

A service of the U.S. Department of Commerce, this database includes the National Trade Data Bank (NTDB). Provides full-text reports and statistics on basic U.S. economic and financial data, as well as international trade data.

[Academic Search Complete](#)

Indexes, abstracts, and provides full-text to over 9,500 publications in nearly every academic field, including accounting. It offers more than 5,500 full-text periodicals, including more than 4,600 peer-reviewed journals, including finance.

[CountryWatch](#)

Provides a concise political, economic, corporate, and environmental survey for each of the 191 countries. Coverage is updated daily and includes a comprehensive investment overview for each country.

[Europa World](#)

Europa World is the online version of the *Europa World Year Book*, covering political and economic information in over 250 countries. Country finance data includes currency and exchange rates, bank reserves, money supply, national income and product, balance of payments, GDP by economic activity, budget, and more. Allows user-defined comparisons of multiple country data.

[The Conference Board](#)

Conference Board is a nonprofit, global, research organization. This database provides full-text economic articles and research that make forecasts and analyzes trends. Covers U.S. and international economies and markets.

Web Resources

General Websites

[Yahoo Finance and Investment](#)

http://dir.yahoo.com/Business_and_Economy/Finance_and_Investment/

A comprehensive directory of finance links grouped into broad topics. Covers economics, education, taxes, brokerages, banking, and more.

[Bloomberg](#)

<http://www.bloomberg.com/>

Provides current financial news and much more, including Chart Builder (user-created stock charts); Fund Center (ranking of international funds); a Currency Calculator, and current Market Data.

[CNN/Money](#)

<http://money.cnn.com/>

Provides up-to-date financial news, stock quotes, bond rates, market data, investor research, and much more.

[Wachowicz's Web World: Web Sites for Discerning Finance Students](#)

http://web.utk.edu/~jwachowi/wacho_world.html

A financial management Web directory. Sites are grouped under topics found in the 12th edition of Fundamentals of Financial Management by James Van Horne and John Wachowicz. Covers areas such as Working Capital Management, Valuation, and Investment in Capital Assets.

[OSU Virtual Finance Library](#)

<http://fisher.osu.edu/fin/overview.htm>

Provided by Ohio State's Department of Finance, this site offers a vast listing of quality links, arranged by broad topic. Helpful for students, researchers, and the general public. (Some dead links).

[Global Investor](#)

<http://www.global-investor.com/>

Provides information and resources to the global financial community. Includes books for purchase, conference and course information, extensive finance glossary, and links for ordering free publications.

[Finance Links. Journal of Finance](#)

<http://www.cob.ohio-state.edu/fin/journal/jofsites.htm>

This Journal of Finance metasite provides comprehensive and quality websites grouped under broad topics, including Financial Institutions, Derivatives, Finance Journals, and Research Centers.

[Finance Wise](#)

<http://www.financewise.com/>

Search engine focusing on financial content. Topics are indexed with site contents evaluated by an editorial staff. Includes Special Reports by country, region, and topic. To utilize the full website, the user must register. Registration is free. There are some dead links.

[Financial Times](#)

<http://www.usa.ft.com/>

Includes news, analysis, and market prices from this world-famous financial newspaper, which has an emphasis on international markets. Some features are freely available and others are available only to subscribers. Current Suffolk students and faculty, may use [LEXIS/NEXIS Academic](#) for "free" access to feature articles back to the early eighties.

[ALA/Best of Business Web Sites: Financial Markets and Investments](#)

<http://www.ala.org/ala/mgrps/divs/rusa/sections/brass/brassprotools/bestofthebestbus/bestbusinesswebsitesfinancial.cfm>

Lists the best financial and investment websites, chosen by members of the Business Reference and Services Section (BRASS) of the American Library Association (ALA).

[Forbes](#)

<http://www.forbes.com/companies/>

Provides lists of top 500 U.S. and international companies, 200 best small companies, and Forbes 2000 in different categories, plus up-to-date business and company news.

[Annual Reports and Filings](#)

[Annual Report Gallery](#)

<http://www.annualreports.com/>

A directory of free online annual reports of American companies. Users may search by five criteria: alphabetically, company name, ticker symbol, sector, or industry.

[Securities and Exchange Commission \(SEC\)](#)

<http://www.sec.gov/>

The SEC regulates and enforces securities laws of the United States. The website includes texts of SEC company filings, laws and regulations, proposed and final rules, commission opinions, congressional testimony, and much more.

[Edgar Database](#)

<http://www.sec.gov/edgar/searchedgar/webusers.htm>

Provides texts of reports and filings of corporations that have filed with the U.S. Securities and Exchange Commission. Includes current and historical material. Also, provides texts of mutual fund prospectuses.

[IRIN. Annual Report Resource Center](#)

<http://www.irin.com/cgi-bin/main.cgi?index=main>

The Investor Relations Information Network (IRIN) provides free access to some U.S. company annual reports, generally starting in 1998. Allows browsing and searching by ticker symbol, company name, and keyword.

[Public Register's Annual Report Service](#)

<http://www.annualreportservice.com/>

This is a free annual report service which allows searching by name, ticker symbol, industry, or state. Free registration is required to view reports.

Stocks and Bonds

[Big Charts](#)

<http://bigcharts.marketwatch.com/avatar.asp>

A free service, providing interactive charts, quotes, industry analysis, intraday stock screeners, and market news. The database allows searching by symbol, keyword, industry, fund name, and index and exchange. Includes historical quotes and charting.

[CNN/Money](#)

<http://money.cnn.com/>

Provides up-to-date financial news, stock quotes, bond rates, market data, investor research, and much more.

[PC Quote](#)

<http://www.pcquote.com/>

Stock quotations for shares traded in the US. Includes ticker-symbol lookup and real-time streaming quotes from the NYSE, AMEX, and NASDAQ. Provides market sector information, bond ticker data, and real-time Dow Jones news.

[Bloomberg](#)

<http://www.bloomberg.com/>

Offers Chart Builder, user-created stock charts; Fund Center, a ranking of international funds; a Currency Calculator, and current Market Data.

[ADR.Com](#)

<http://www.adr.com/>

A project of J. P. Morgan, this site provides a comprehensive look at the international American depositary receipts (shares of non-US companies trading in the US). Includes news, commentary, daily pricing and charting.

[Hoover's IPO Central](#)

<http://www.hoovers.com/global/ipoc/index.xhtml>

Hoover's IPO Central provides IPO listings by industry or by name. Includes performance and filing information.

[IPO Express](#)

<http://ipoportal.edgar-online.com/ipo/home.asp>

Up-to-date, comprehensive IPO information, including pricings, performance, and filings.

[SIFMA](#)

<http://www.sifma.org/>

As a result of the merger between The Securities Industry Association(SIA) and The Bond Market Association(TBMA), the new association is called The Securities Industry and Financial Markets Association(SIFMA). The website provides legislative news, conference information, research papers, comment letters, regulatory issues, and more.

[Investing in Bonds](#)

<http://www.investinginbonds.com/>

Supported by The Securities Industry and Financial Markets Association(SIFMA), this site provides daily municipal bond and corporate bond reports, glossary, investor guides and educational materials, and current news.

[TreasuryDirect](#)

<http://www.treasurydirect.gov/>

This website allows the user to buy and redeem securities directly from the U.S. Department of the Treasury in electronic form.

[Government Section of Treasury Direct](#)

<http://www.treasurydirect.gov/govt/govt.htm>

From the United States Bureau of Public Debt, this website includes federal debt schedules, and daily, annual, and monthly debt data. Includes [Public Debt Reports](#).

[Municipal Securities Rulemaking Board \(MSRB\)](#)

<https://www.msrb.org/msrb1/>

The MSRB makes rules regulating dealers of municipal bonds, municipal notes, and other municipal securities. The website provides texts of security rules and forms, up-to-date news and pertinent publications.

[National Venture Capital Association](#)

<http://www.nvca.org/>

This professional group provides an overview of the industry. Although some publications are fee-based, there is useful free content. The front page includes links to industry statistics and public policy highlights.

[The MoneyTree Survey](#)

<http://www.pwcmoneytree.com/moneytree/index.jsp>

A collaboration between PricewaterhouseCoopers, Venture Economics and the National Venture Capital Association, the MoneyTree Survey is a quarterly study of venture capital investment activity in the USA. Historical trends as well as current information are available.

Mutual Funds, Hedge Funds, and Pension Funds

[Morningstar Mutual Funds](#)

<http://www.morningstar.com/Cover/Funds.html>

Free access to extensive mutual fund performance data, plus stock quotes and key company ratios, and news. [Morningstar Fund QuickRank](#) ranks more than 8,000 funds.

[Mutual Funds. Investing Company Institute \(ICI\)](#)

<http://www.ici.org/>

The ICI is the national association of the U.S. investment company industry. Its website includes texts of news releases, congressional testimony, comment letters, research publications, and policy papers. Provides industry statistics, mutual fund and closed-end fund statistics, as well as unit investment trust data.

[Yahoo! Mutual Fund Center](#)

<http://finance.yahoo.com/f0?u>

Yahoo's Mutual Fund Center is a valuable, comprehensive site for investors. Includes a daily quote look-up, current news, and a [Stock Screener](#), which searches funds by selected criteria, including fund family, rank, rating, performance, price, and more. Lists historic top performers by category. Provides free fund prospectuses, and links to educational material and glossary.

[Hedge Fund Center](#)

<http://www.hedgefundcenter.com/>

The Hedge Fund Center is an unbiased resource whose goal is to provide professional objective information. The site explains theoretical, operational, and commercial issues related to hedge funds.

[Hedge Fund Association \(HFA\)](#)

<http://www.thehfa.org/>

The HFA is an international not-for-profit association of hedge fund service providers and investors. The site provides information describing hedge funds and investing in such. Includes articles on hedge fund strategies plus press releases and news.

[Insured Retirement Institute \(IRI\)](#)

<http://www.irionline.org/>

The IRI is a nonprofit trade association for industry, financial advisors and consumers. This

website offers information and resources to assist in understanding annuities and the role of these products in financial retirement planning. IRI provides the industry with educational coursework, consumer pamphlets, industry statistics, [Annuity Fact Book](#), and research.

[Pension & Investments Online](#)

<http://www.pionline.com>

An "international financial newspaper for institutional investing and fund management." Provides full-text of the 2004 Pension Fund Directory, 2004 Money Manager Directory, and 2004 Global Money Manager Directory, covering rankings and total assets for top plans. News and other valuable material is available only with a paid subscription.

[Pension Benefit Guaranty Corporation \(PBGC\)](#)

<http://www.pbgc.gov/>

"PBGC is a federal government corporation established by Title IV of the Employee Retirement Income Security Act of 1974 (ERISA) to encourage the continuation and maintenance of defined benefit pension plans, provide timely and uninterrupted payment of pension benefits to participants and beneficiaries in plans covered by PBGC, and keep pension insurance premiums at the lowest level necessary to carry out the Corporation's objectives." Includes forms, factsheets, technical updates, and 7 years of pension insurance data.

Stock Markets

[Stock Exchanges of the World](#)

<http://library.nsuok.edu/collegebt/act/stockres.html>

Provided by the Northeastern State University Library, this site offers links to U.S. and foreign stock exchanges.

[World Federation of Exchanges](#)

<http://www.world-exchanges.org/WFE/home.Asp?nav=ie>

The World Federation of Stock Exchanges is the global trade association for the exchange industry. Membership includes 54 regulated exchanges from all regions of the world. Includes links to member exchanges, texts of publications and research, and annual, monthly, and time series data (PDF and Excel).

[\(former\) American Stock Exchange](#)

<http://www.amex.com/>

NYSE Euronext (NYX), the world's leading and most diverse exchange group, acquired the American Stock Exchange (Amex).

[NASDAQ](#)

<http://www.nasdaq.com/>

[New York Stock - Exchange NYSE Euronext](#)

<http://www.nyse.com/>

Commodities/Futures

[Chicago Mercantile Exchange \(CME\)](#)

<http://www.cmegroup.com/>

The CME Group serves the risk management needs of customers, providing all major futures and options products available on any exchange. This website offers current market quotes, interest rates, and market regulation advisory notices.

[U.S. Commodity Futures Trading Commission \(CFTC\)](#)

<http://www.cftc.gov/>

An independent agency of the U.S. government, the commission's mission is to protect market users and the public from fraud and abusive practices and to foster financially sound futures and option markets. The website discusses oversight programs, consumer advisories, and enforcement actions. Includes texts of reports and publications plus rules, orders, and congressional testimony.

[Futures Industry Association \(FIA\)](#)

<http://www.futuresindustry.org/>

The FIA represents all organizations that have an interest in the futures market, including futures merchants, international exchanges, banks, brokers, and accounting firms. The site provides texts of the current [Outlook 2009](#), current [Comment Letters](#), and much more.

[TFC Commodity Charts](#)

<http://tfc-charts.w2d.com/>

Tracks commodities and financial indicators and offers free commodity charts (daily, weekly, monthly, and historical) and quotes. Also allows the creation of personalized charts, where the user may select commodities, dates, and chart types.

Banking

[Federal Reserve System Online](#)

<http://www.federalreserveonline.org/>

Provides links to district banks of the Federal Reserve System, texts of policy papers and financial and regulatory reports, and articles from the [Federal Reserve Bulletin](#). The [Federal Reserve Board Statistics](#) is valuable for current daily and historical data on foreign exchange rates, interest rates (including those for government investments like T Bills), consumer credit, banks and finance companies, and a variety of other monetary measures.

[Federal Deposit Insurance Corporation \(FDIC\). Industry Analysis](#)

<http://www.fdic.gov/bank/index.html>

Provides comprehensive financial information and analysis on the banking industry as well as economic trends. Includes searchable databases of data on specific banks, texts of FDIC policy research on regional and national banking, and data on failed banks.

[Federal Deposit Insurance Corporation. Statistics on Banking](#)

<http://www2.fdic.gov/SDI/SOB/>

"A quarterly publication that provides detailed aggregate financial information as well as key structural data for all FDIC-insured institutions." The user can customize reports using five categories- Industry (commercial or savings), Geography (state or national) By (asset, foreign office, insurance fund, or time series), Date (starting in 1992), and Report (assets and liabilities, income and expense, structure tables, or publication).

[Banking Data and Research](#)

<http://www.ala.org/ala/mgrps/divs/acrl/publications/crlnews/1999/nov/bankingdataresearch.cfm>

Annotated internet banking resources, provided by the Association of College & Research Libraries (ACRL). Some dead links.

[Bank Rate Monitor](#)

<http://www.bankrate.com/brm/default.asp>

Provides current rates on CD's, IRA's, loans, and credit card balances, plus news, educational materials, and glossaries.

[Economic Data \(FRED II\)](#)

<http://research.stlouisfed.org/fred2/>

The Federal Reserve Economic Data (FRED II) is a database of over 2,900 U.S. economic time series. A small sample of time series data includes Treasury maturity rates, deposits, consumer credit, government securities, trade data, and bank prime loan rate. Data can be downloaded in Excel and text formats and can be viewed in charts.

[Bank for International Settlements \(BIS\)](#)

<http://www.bis.org/index.htm>

The BIS "is an international organization which fosters international monetary and financial cooperation and serves as a bank for central banks." The website offers full-texts of policy papers, working papers, international financial statistics, and other publications. Includes legal texts, such as the Charter, statutes, and basic agreements. Also provides a list of central bank [websites](#).

[European Central Bank](#)

<http://www.ecb.int/home/html/index.en.html>

"The European Central Bank and the national central banks together constitute the Eurosystem, the central banking system of the euro area. The main objective of the Eurosystem is to maintain price stability: safeguarding the value of the euro." This website provides daily rate exchanges, texts of legal instruments, including treaties, statutes, and policy procedures, and texts of the [ECB](#)

[Monthly Bulletin](#). Includes data, such as balance of payments, investment funds, and securities issues. Research papers and occasional papers are available for downloading.

[Bank of Canada](#)

<http://www.bankofcanada.ca/en/>

The Bank of Canada sets financial and monetary policy and manages public funds and debt. The website provides current interest and exchange rates, price indexes and monetary data indicators, and full-text access to speeches and working papers.

International Finance

[globalEDGE](#)

<http://globaledge.msu.edu/ibrd/ibrd.asp>

Developed by Michigan State University's Center for International Business Education and Research (MSU-CIBER), this site is a web portal that connects international business professionals to information and learning resources on global business activities, including links to data, government, banking, and finance resources. The Money category provides comprehensive, annotated links to banks, finance, and stock exchange resources.

[World Bank Group: Financial and Private Sector](#)

<http://www.ifc.org/economics/>

The World Bank provides loans, advice, and technical assistance to low and middle income countries to reduce poverty. Its Finance and Private Sector website provides graphed data of topic indicators by country. In addition, it offers downloadable statistics, publications, and key financial reports, in addition to a searchable database covering banking systems, capital markets, financial development and rural and microfinance.

[OECD. Financial Markets](#)

http://www.oecd.org/topic/0,2686,en_2649_37467_1_1_1_1_37467,00.html

The Organization for Economic Co-operation and Development (OECD) is "30-member countries sharing a commitment to democratic government and the market economy." The OECD covers financial issues related to banking, securities, and institutional investors, while promoting the liberalization in financial services. Its finance and investment website offers summaries and texts of reports, working papers, case studies, guidelines, speeches, and more. Investment, interest, market, and economic data are available for downloading. Publications and statistics may be accessed by topic or by country.

[IMF. Finances.](#)

<http://www.imf.org/external/fin.htm>

"The International Monetary Fund is a cooperative international monetary organization whose members currently include 183 countries." It was established to promote international monetary cooperation, exchange stability, and to provide temporary financial assistance to countries to help ease balance of payments adjustment. This website provides the texts of the Fund's Quarterly

reports and financial reports, monthly data on financial resources, and [Financial Data by Country](#) (from 1996 to present), including outstanding purchases and loans, quota amounts, financial arrangements, and projected payments.

[Bank for International Settlements \(BIS\)](#)

<http://www.bis.org/index.htm>

The BIS "is an international organization which fosters international monetary and financial cooperation and serves as a bank for central banks." The website offers full-texts of policy papers, working papers, international financial statistics, and other publications. Includes legal texts, such as the Charter, statutes, and basic agreements. Also provides an updated list of central bank [websites](#).

[European Central Bank](#)

<http://www.ecb.int/home/html/index.en.html>

"The European Central Bank and the national central banks together constitute the Eurosystem, the central banking system of the euro area. The main objective of the Eurosystem is to maintain price stability: safeguarding the value of the euro." This comprehensive website provides daily rate exchanges, texts of legal instruments, including treaties, statutes, and policy procedures, and texts of the *ECB Monthly Bulletin*. Includes data, such as balance of payments, investment funds, and securities issues. Research papers and occasional papers are available for downloading.

Data

[Government Documents. Finance & Banking](#)

<http://www.lib.umich.edu/govdocs/stecfin.html>

Provided by the University of Michigan Documents Center, this site offers annotated links to finance and banking data resources. Links are arranged by broad categories, such as foreign investment, mutual funds, price converters, stock markets, and bankruptcy.

[New York Stock Exchange. Fact Book Interactive Viewer](#)

<http://www.nyse.com/factbook>

The Viewer allows access to current and historic data via charts and graphs. The user may search using keyword or choose a chapter. Chapters cover topics, such as bonds, futures, international data, stock price trends, historical data, and much more.

[Economic Time Series](#)

<http://www.economagic.com/>

Provides over 100,000 economic time series, for which data and charts can be retrieved. Data can be charted with comparisons, and Excel files are also available. Majority of data sets involve U.S. macroeconomic data from the Federal Reserve, Census Bureau, Bureau of Labor Statistics, and the Department of Commerce. Includes stock price indexes and information from foreign banks, such as the Bank of Japan and the Central Bank of Europe.

[Economic Data \(FRED II\)](#)

<http://research.stlouisfed.org/fred2/>

The Federal Reserve Economic Data (FRED II) is a database of over 2,900 U.S. economic time series. A small sample of time series data includes Treasury maturity rates, deposits, consumer credit, government securities, trade data, and bank prime loan rate. Data can be downloaded in Excel and text formats and can be viewed in charts.

[Federal Deposit Insurance Corporation Statistics on Banking](#)

<http://www2.fdic.gov/SDI/SOB/>

"A quarterly publication that provides detailed aggregate financial information as well as key structural data for all FDIC-insured institutions." The user can customize reports using five categories- Industry (commercial or savings), Geography (state or national) By (asset, foreign office, insurance fund, or time series), Date (starting in 1992), and Report (assets and liabilities, income and expense, structure tables, or publication).

[Federal Reserve Board: Statistics: Releases and Historical Data](#)

<http://www.federalreserve.gov/Releases/>

Valuable site for current daily and historical data on foreign exchange rates, interest rates (including those for government investments like T Bills), consumer credit, banks and finance companies, and a variety of other monetary measures.

[NBER Macrohstory Database](#)

<http://www.nber.org/databases/macrohistory/contents/index.html>

The National Bureau of Economic Research (NBER) maintains an extensive data set that covers pre-WWI and interwar economies, including production, employment, money, prices, asset market transactions, foreign trade, and government activity. The data set has some coverage of the United Kingdom, France and Germany, although it predominantly covers the United States.

[OECD Statistics. Finance](#)

http://www.oecd.org/topicstatsportal/0,2647,en_2825_495635_1_1_1_1_1,00.html

The Organization for Economic Co-operation and Development (OECD) is "30-member countries sharing a commitment to democratic government and the market economy." Its financial statistics portal offers transaction and stock data, balance of payments statistics, foreign direct investment statistics, exchange rates, and public debt data.

[Bank for International Settlements. International Financial Statistics.](#)

<http://www.bis.org/statistics/index.htm>

The BIS "is an international organization which fosters international monetary and financial cooperation and serves as a bank for central banks." The International Financial Statistics site provides banking statistics, securities statistics, derivative statistics, and the joint BIS-OECD-World Bank statistics on external debt.

[United Nations. Statistics Division](http://unstats.un.org/unsd/)

<http://unstats.un.org/unsd/>

The U.N. Statistics Division's site offers data within broad categories, including national accounts, trade, environment, energy, industrial, and social. Not all of the statistics are available for free.

Education and Research

[Rodney L. White Center for Financial Research. Wharton School of the University of Pennsylvania](http://finance.wharton.upenn.edu/~rlwctr/)

<http://finance.wharton.upenn.edu/~rlwctr/>

Rodney L. White Center is one of the oldest financial research institutions in the nation. It sponsors a wide range of financial research and offers freely downloadable working papers from 1971 to the present. The [Wharton Financial Institutions Center](#) offers current full-text working papers, and the [Weiss Center for International Financial Research](#) offers full-text working papers from 1998.

[Securities Class Action Clearinghouse. Stanford Law School](http://tfc-charts.w2d.com/)

<http://tfc-charts.w2d.com/>

The Clearinghouse maintains an annual Index of Filings (from 1996) containing issuers that have been named in federal class action securities fraud lawsuits. Includes over 6,000 complaints, briefs, and other litigation materials. Also offers news and texts of articles and reports.

[Research. London Business School](http://www.london.edu/facultyandresearch/researchactivities.html)

<http://www.london.edu/facultyandresearch/researchactivities.html>

The London School of Business is one of the world's best known centers for financial education and research. This site allows some free downloading of working papers.

[Institute of Business and Economic Research \(IBER\)](http://iber.berkeley.edu)

<http://iber.berkeley.edu>

University of California Berkeley's IBER provides free texts of working papers on finance, economics, and other areas from the 1970's and 1980's to the present.

[Center for Research in Security Prices](http://www.crsp.com/)

<http://www.crsp.com/>

"The Center for Research in Security Prices (CRSP®) is a financial research center at the University of Chicago Graduate School of Business." The site provides conference information and some free downloading of working papers.

[Charles A. Dice Center](http://fisher.osu.edu/fin/dice/index.htm)

<http://fisher.osu.edu/fin/dice/index.htm>

"The Charles A. Dice Center for Research in Financial Economics is dedicated to promoting high-quality research in financial economics at Ohio State University. The Center is especially

interested in sponsoring research which is of importance to the financial community of Ohio and the United States." This website offers free downloading of working papers.

[The Pension Research Council](http://www.pensionresearchcouncil.org/)

<http://www.pensionresearchcouncil.org/>

The Pension Research Council of the Wharton School of the University of Pennsylvania sponsors research on private pension and social security programs and other benefit plans in the U.S. and around the world. This site allows access to the organization's newsletters and some working papers.

[Asia-Pacific Financial Markets \(FIMA\) Research Center](http://www2.hawaii.edu/~fima/)

<http://www2.hawaii.edu/~fima/>

The FIMA Research Center is a leader in academic and policy research on financial markets development in the Asia-Pacific region. The website provides some journal reprint articles, a listing of finance links, and free working papers.

[InvestorWords](http://www.investorwords.com/)

<http://www.investorwords.com/>

Provided by WebFinance Inc., InvestorWords contains over 6,000 definitions of financial terms. Includes hypertext links (20,000) within definitions and a subject listing.

[Guide to Financial Statements](http://www.ibm.com/investor/help/guide/statement-basics.wss#statementearnings)

<http://www.ibm.com/investor/help/guide/statement-basics.wss#statementearnings>

Provided by IBM, this guide explains the basic components of financial statements.

Selected Print Resources

Mergent Manuals

REF. HG 4961 M7+

Mergent Manuals, formerly Moody's Manuals, provide consolidated income accounts, balance sheets, corporate history, debt information, and more. Available online via [Mergent WebReports](#)

[Mergent Industrial Manual](#)

REF. HG 4961 .M7 15

Covers top industrial corporations listed on the New York Stock Exchange, the American Stock Exchange, and regional U.S. exchanges. Available online via [Mergent WebReports](#).

[Mergent OTC Industrial Manual](#)

REF. HG 4961 .M7 O9

Covers the NASDAQ National Market industrial companies, including full financial statements and full descriptions of operations and products. also available online via [Mergent WebReports](#).

[Mergent International Manual](#)

REF. HG 4961 .M7 I8

Provides up to seven years of "as reported" income statements and balance sheets for over 13,000 companies in 100 countries. Includes currency and exchange data. Also available online via [Mergent WebReports](#).

[Mergent Municipal & Government Manual](#)

REF. HG4931 .M58

Covers nearly all U.S. taxing jurisdictions and agencies, including school districts, hospitals, cities and towns, and counties with a total long-term debt of \$25,000,000 or over.

[Mergent Bank and Finance Manual](#)

REF. HG 4961 .M7 B3

Covers banks, savings and loans, insurance companies, real estate investment trusts, and unit investment trusts. Also available via [Mergent WebReports](#).

[Mergent Transportation Manual](#)

REF. HG 4961 .M7 T7

Covers all publicly held airlines, railway and steamship lines, vehicle rental/leasing companies, and pipeline, tunnel, and bridge operators. Also available online via [Mergent WebReports](#).

[Mergent Public Utility Manual](#)

REF. HG 4961 .M7 P9

Covers electric and gas utilities, gas transmission companies, and telephone and water companies. Also available online via [Mergent WebReports](#).

[Mergent's Handbook of Common Stocks](#)

REF. HG 4905 .M815

This quarterly print publication provides historical data, analysis, and stock information for over 900 stocks. Each company receives a one-page overview designed to help determine how the company has performed in the past, its current performance, and predictions for the future.

[Mergent Bond Record](#)

REF. HG 4905 .M78

A comprehensive review of 68,000 issues. Provides complete coverage of corporate, government, municipal, industrial development/environmental revenue and international bonds.

[Mergent Unit Investment Trust](#)

REF. HG 4530 .M67

Detailed annual payment record on over 35,000 fund series with corporate CUSIP numbers.

Arranged by fund group in alphabetical order.

[Mergent Dividend Record](#)

REF. HG 4537 .M66

Provides current information on cash and stock dividends, stock splits, and rights issues for more than 30,000 domestic and Canadian issues plus some global equities and American Depository Receipts.

Standard & Poor's Daily Stock Price Record

REF. HG 4915 .S6+

Provides daily stock prices since 1972 (current years in Reference; earlier years on Floor B.)

[Daily Stock Price Record: American Stock Exchange](#) REF. HG 4915 .S66

[Daily Stock Price Record: NASDAQ](#) REF. HG 4915 .S665

[Daily Stock Price Record: New York Stock Exchange](#) REF. HG 4915 .S664

Dun & Bradstreet's [Industry Norms and Key Business Ratios](#)

REF Desk HF 5681 .R25 I525

Provides statistics for a wide range of industries, "over 800 lines of business," arranged by SIC code. Includes "typical" balance sheet and income statements with "common-size" financial figures, as well as 14 performance ratios. Figures are based on data taken from a Dun & Bradstreet database that includes over one million financial statements from public and private companies. [KBR](#) is also available online.

Troy's [Almanac of Business and Industrial Financial Ratios](#)

REF Desk HF5681 .R25 T861

Starting with the 2002 edition, the Troy's Almanac is organized by the North American Industry Classification System (NAICS), instead of the Standard Industrial Classification (SIC). An appendix provides a translation between NAICS and SIC. 192 industries are covered, and their performance averages are broken down by 12 categories based on asset size. Each industry is described by fifty performance indicators, which are based on tax returns.

[RMA Annual Statement Studies](#) (Robert Morris)

REF Desk HF 5681 .B2 R6

This publication provides "common-size" balance sheets and income statements, and 16 financial and operating ratios, for over 500 lines of business, by company size groups. Although it is organized by SIC code, the appropriate NAICS number(s) are also listed. RMA [eStatement Studies](#) are also available online.

[Directory of Venture Capital & Private Equity Firms Domestic & International](#)

REF. HG4751 .D57 2009

Covers more than 3,500 firms worldwide. Listings generally include contact information, mission statements, portfolio companies, geographic preferences, average and minimum investments,

investment criteria, and extensive information on key executives.

[A Financial History of the United States](#)

REF. HG181 .M297 2002

Three volume set which covers the history of finance in America. Begins with the discovery of America. Includes selected bibliography. Available online through [Gale Virtual Reference](#).

Dictionaries, Encyclopedias, & Handbooks

[Financial Lexicon : a Compendium of Financial Definitions, Acronyms, and Colloquialisms](#)

REF HG151 .B2697 2005

A comprehensive financial title which explains formal and informal terminology. Unlike most financial dictionaries, it includes colloquialisms.

[Hoover's Handbook of American Business](#)

REF. HG 4057 .A28617 (2 vols.)

Comprehensive profiles of 750 of America's largest and most influential companies. Profiles cover company history, chief executives, products and operations, competitors, and seven to ten years of income statement data. Includes rankings by sales, profits, and growth. Annual.

[Hoover's Handbook of World Business](#)

REF. HG 4009 .H66

Comprehensive profiles of 300 firms from Canada, Europe, and Japan. Company information provided includes history, chief executives, products and operations, competitors, and 10 years of income statement data. Annual.

[Hoover's Handbook of Emerging Companies](#)

REF. HG 4057 .A28618

Covers U.S. public companies with sales between \$10 million and \$1 billion, three years of reported sales, at least 20% rate of sales growth, and positive net income. Provides 10 years of financials (revenue, income, profit margin), 10 years of stock history (price, P/E, per share), brief description, chief executives, products, and competitors. Annual.

[International Dictionary of Finance](#)

REF. HG 151 .B274 2003

Covers transnational finance and domestic matters in the major countries, particularly in the United Kingdom and the United States. The five principal subjects covered are money markets, commodity markets, securities markets, banking, and insurance.

[Handbook of Modern Finance](#)

REF. HG 173 .H34 (loose-leaf)

Covers technical, analytical, and theoretical questions for corporate financial executives, strategic planners, accountants, attorneys, security analysts, and bankers. Main topics covered are financial

institutions and markets, security analysis and portfolio management, short-term internal corporate financial decisions, long-term financial decisions, and international financial decision making.

[Handbook of Financial Analysis, Forecasting, and Modeling](#)

REF. HG 4011 .S46 2001

Provides tools for diagnosing the financial and operating health of businesses. Includes checklists, ratios, models, formulas, and statistical techniques to help in profitable decision making.

[New Palgrave Dictionary of Money & Finance](#)

REF. HG 151 .N48 1992 (3 vols.)

Includes 1000 scholarly essays from over 800 specialists. Each article is signed and includes a bibliography plus cross-references.

[International Encyclopedia of the Stock Market](#)

REF. HG 4551 .I528 1999 (2 vols.)

Defines 2,000 terms related to regional and world stock market practice. Provides descriptions of the economies and stock markets of the world's most advanced countries plus entries on people, institutions, and events.

[Encyclopedia of Business and Finance 2007](#)

A two-volume set of over three hundred entries covering the major areas of business- accounting, economics, finance, information systems, law, management, and marketing. Articles are signed and include bibliographies. Available online through [Gale Virtual Reference Library](#).

[Guide to Financial Markets](#)

REF. HG 173 .L485 2003

Explains the basics of financial markets, including foreign exchange markets, money markets, bond markets, international fixed-income markets, equity markets, commodities and futures, and options and derivatives.

Data

[CRB Commodity Year Book](#)

REF. HF 1041 .C56

Provides comprehensive data on the commodity market in the United States and in the world. Includes commentary and analysis. Annual.

[International Financial Statistics Yearbook](#)

REF. HG 61 .I57

The International Monetary Fund's principal statistical publication and an excellent source for statistics on all aspects of international and domestic finance. Includes country tables for most

fund members. Data generally begins in 1991. Also available [online](#).

[Balance of Payments Statistics Yearbook](#)

REF. HF 1014 .B3

Contains balance of payments data for 160 countries and investment position data for 37 countries. Information is presented in regional and world tables. Also available [online](#).

[Business Statistics of the United States.](#)

REF HC101 .A13122

Provides basic historical and updated data on the U.S. economy. Contains 3,000 economic time series, largely from federal government sources. Includes data, such as GDP, income, employment, investment, prices, wages, productivity, profits, international trade, and interest rates. Biennial.