Screener App

WHY SHOULD I USE THE APP?

The **Screener App** in Thomson Reuters Eikon is a powerful, flexible and intuitive idea generation tool that enables you to view a chosen universe and identify a group of securities that meet your investment objectives. It provides you with a suite of sophisticated screening tools that enable you to select a universe of companies, set filters, sort, group, and aggregate data using your own fully customizable reports for deep and meaningful analysis.

Select a screening universe and set filters | Create customized reports | Sort, group and rank securities | Export screens to MS Excel
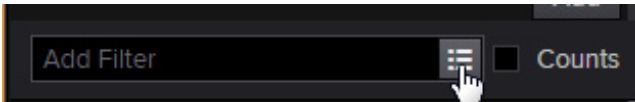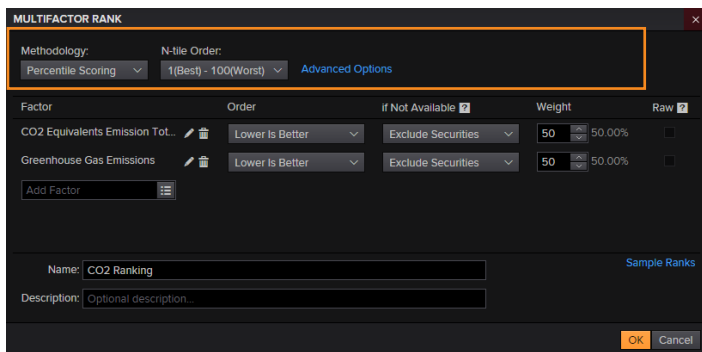

KEY FACTS

• Select your preferred universe to screen on.

• Create simple and sophisticated filters and ranks on a broad range of factors to identify new investment opportunities.

• Now you can screen on ESG (Environmental, Social and Governance) data. Examples:

  – Ethical / Negative Screening: avoid companies involved in activities such as the manufacture of armaments.

  – Positive / Best in Class Screening: companies that demonstrate an active, positive contribution to sustainable development and lead their peer group in respect of environmental and social performance.

• Create lists of securities that you can use in other apps, e.g. the Portfolios and Lists app.

• Quickly export your screens to Microsoft Excel and refresh data without leaving the spreadsheet.

TOP TIPS ON HOW TO USE THE APP

- To access Screener type **Screener** in the Eikon Search box and select the entry from the **autosuggest** options.
- Select a screen universe: public companies, private companies, an index, a portfolio or a watchlist.
- Three ways to add filters:
  – **Quick Filters** let you select the most popular filters with a mouse click
  – Type a key word in the filter **Search box** and select an entry from Autosuggest
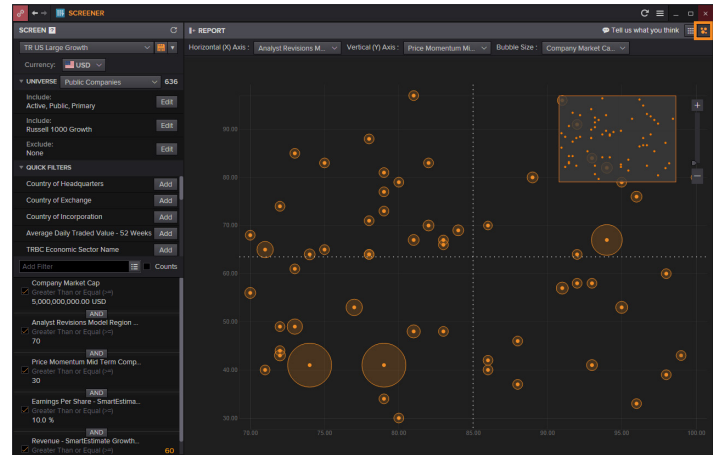 – **Launch Field Picker** to browse the entire filter library

- Add as many filters as required and combine them either with AND or with OR.
- Save your screens for future use and share them with other Eikon users if required.
- Create customized reports to sort and rank securities, including multi-factor ranks:
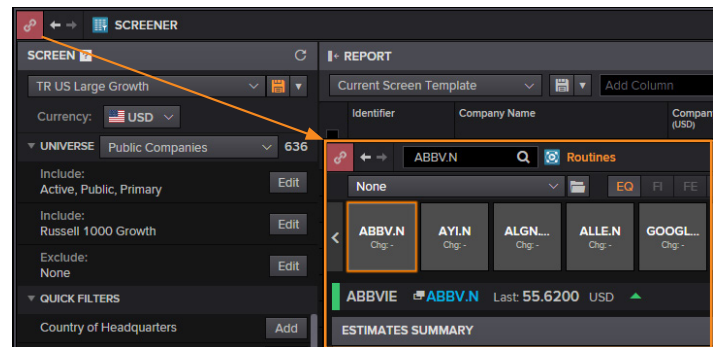

- You can rank on single factors as well as a combination of factors (=multi-factor rank). To create a multi-factor rank click "Add Rank" [this is shown in the screenshot on page 1], then "New MultiFactor Rank". Use the field picker to select the factors you want to combine. In this example two factors have been combined, each with a weighting of 50%: **CO2 Equivalent Emission Total** and **Greenhouse Gas Emissions.**

- Use the Scatter Chart to visualize the results:

- Link Screener to other apps, e.g. Routines to use the screening results for further analysis.

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