

# Import/Export company information in Capital IQ Pro

Login to Capital IQ pro >> Click on Screener >> Select Companies.

The screenshot shows the S&P Capital IQ Pro interface. The 'Screener' menu is open, and the 'Companies' option is selected. The 'Companies' dropdown menu is visible, listing various categories such as 'Key Developments', 'Regulated Depositories (U.S.)', 'Insurance Statutory Financials (U.S.)', 'Reinsurance Relationships (U.S.)', 'Energy Companies by State', 'Regulated Energy Companies', 'Wireline Regulatory (ARMIS)', 'Companies (Classic)', and 'Specialty Financial Services (U.S.)'. A table of company data is partially visible on the right side of the screen.

	PRICE	DAILY CHG	DAI
	¥ 897.80	16.70	
	¥ 5,320.00	88.00	
	¥ 1,867.00	20.50	

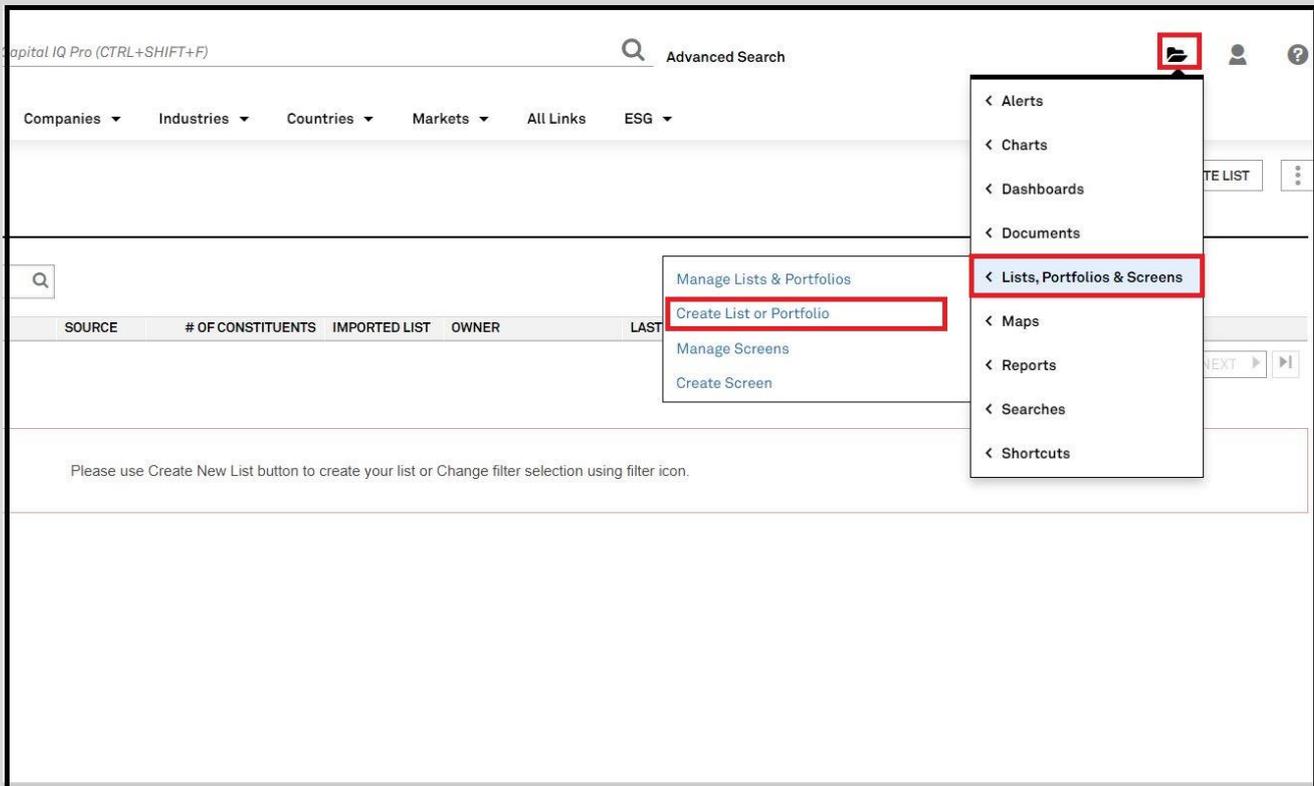
Use the Browse Criteria option to add companies or click add companies to search for the particular companies.

The screenshot shows the S&P Capital IQ Pro interface with the 'Browse Criteria' and 'Add Criteria' options highlighted. The 'Browse Criteria' section is open, showing a list of criteria categories such as 'Company Details', 'General Transaction Details', 'M&A', and 'Offerings'. The 'Add Criteria' dropdown menu is open, showing a search bar and a list of geographies: 'All Geographies', 'United States and Canada', 'Europe', 'Asia-Pacific', 'Middle East', 'Latin America and Caribbean', and 'Africa'. The 'ADD COMPANIES' and 'RUN SCREEN' buttons are also highlighted.

[Next Step](#)

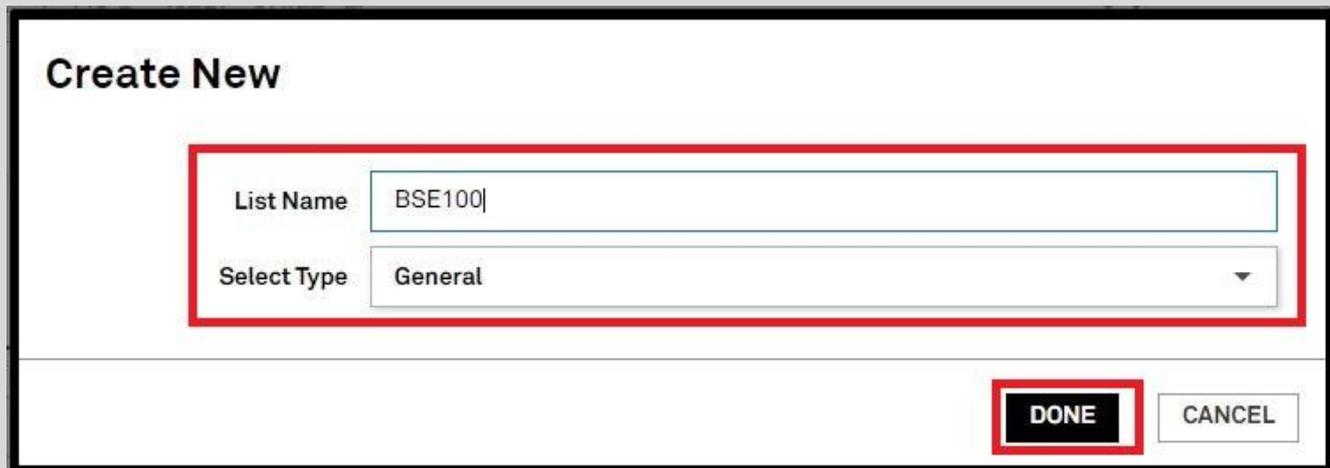
## Steps for importing the list of companies.

Click on the File symbol on the right side top corner, then Click on **Lists, Portfolios & Screens** and select create **List or Portfolio**.



The screenshot shows the Capital IQ Pro interface. At the top right, a 'File' icon (a document with a pencil) is highlighted with a red box. A dropdown menu is open, listing various options: Alerts, Charts, Dashboards, Documents, **Lists, Portfolios & Screens** (highlighted with a red box), Maps, Reports, Searches, and Shortcuts. Below the menu, a sub-menu is visible with options: Manage Lists & Portfolios, **Create List or Portfolio** (highlighted with a red box), Manage Screens, and Create Screen. The main interface shows a search bar and a table with columns: SOURCE, # OF CONSTITUENTS, IMPORTED LIST, OWNER, and LAST. A message at the bottom reads: 'Please use Create New List button to create your list or Change filter selection using filter icon.'

Enter your list name and click on **Done**



The 'Create New' dialog box is shown. It has a title 'Create New' and two input fields: 'List Name' with the value 'BSE100' and 'Select Type' with the value 'General'. Both fields are highlighted with a red box. At the bottom right, there are two buttons: 'DONE' (highlighted with a red box) and 'CANCEL'.

Click on Upload File in text file format

# S&P Capital IQ PRO

Search S&P Capital IQ Pro (CTRL+SHIFT+F)

Apps ▾ News ▾ Screener ▾ Dashboards ▾ Research ▾ Companies ▾ Industries ▾

View All Lists

## List Manager | BSE100

Currency U.S. Dollar (USD) ▾ List D

^ ADD ENTITIES MANUALLY

Search to add Company name, Trading Symbol, CUSIP, ISIN, CINS or Copy and Paste a List or Drag and drop an .xlsx, .txt, or .

— Or —

**UPLOAD FILE** Accepted file formats are TXT, CSV, and XLSX.

∨ ADD ENTITIES BY SCREENING

### List Contents

Select Entity Type and Identifier type >> Choose file and Click on Upload File

## Upload File

Entity Type Companies ▾

Identifier Type ISIN ▾

**CHOOSE FILE** Codes.txt

The maximum file size for upload is 5 MB and 20k records. Valid File formats: txt, xlsx, csv

**UPLOAD FILE** CANCEL

Once you have uploaded it successfully Click on Save

View All Lists

### List Manager | BSE100

Currency: U.S. Dollar (USD) Selected List: BSE100 List Description: There currently is no list description

ADD ENTITIES MANUALLY

Search to add Company name, Trading Symbol, CUSIP, ISIN, CINS or Copy and Paste a List or Drag and drop an .xlsx, .txt, or .csv file

— Or —

UPLOAD FILE Accepted file formats are TXT, CSV, and XLSX.

ADD ENTITIES BY SCREENING

#### List Contents

Companies

ADD RELATED EQUITIES DELETE

	COMPANY	TICKER	SOURCE	MARKET CAP (\$M)	PRICE (\$)	YTD P
<input type="checkbox"/>	ACC Limited (NSEI:ACC)	ACC (NSEI)	Static	5,501.4	29.30	
<input type="checkbox"/>	Adani Enterprises Limited (BSE:512599)	512599 (BSE)	Static	50,088.7	44.91	
<input type="checkbox"/>	Adani Ports and Special Economic Zone Limited (NSEI:ADANIAPORTS)	ADANIAPORTS (NSEI)	Static	21,046.5	9.74	
<input type="checkbox"/>	Adani Total Gas Limited (NSEI:ATGL)	ATGL (NSEI)	Static	44,025.6	40.03	
<input type="checkbox"/>	Ambuja Cements Limited (BSE:500425)	500425 (BSE)	Static	11,771.3	6.22	
<input type="checkbox"/>	Apollo Hospitals Enterprise Limited (NSEI:APOLLOHOSP)	APOLLOHOSP (NSEI)	Static	8,140.9	56.62	

On the left side, under List & Index Screening Criteria >> Click My Lists

## S&P Capital IQ <sup>PRO</sup>

Search S&P Capital IQ Pro (CTRL+SHIFT+F)

Apps News **Screeener** Dashboards Research Companies Industries

Company Data Asset Data Capital And M&A Industry Data Geographic Data Market Data Scree

### Companies ☆ | NEW SCREEN

Recommended Criteria << | ☰

Industry Classification + Geography +

Company Type + Company Status +

CRITERIA

DISPLAY COLUMNS ▾

#### Browse Criteria

	Conversion
	Redemption
	Pricing and Amounts
<b>Pricing &amp; Market Data</b>	
Market Capitalization / Valuation	
Pricing Information	
Trading Multiples	
Identifier Information	
Equity Market Data	
	<b>People and Compensation</b>
	Top Executives
	CEO Executive Pay Ratios
<b>Ownership</b>	<b>List &amp; Index Screening Criteria</b>
Detailed Ownership	My Lists
Aggregates	Index Constituents

Select the required List >> Click on Add

### Field Selector

Field Search

Add Field as a Criteria, Ranking, or Display Column by adjusting the settings in a desired tab and clicking on "Add" or "Done"

Category

- ▶ Company Details
- ▶ Financials
- ▶ Industry Data
- ▶ Market Data
- ▶ Estimates
- ▶ Trading Multiples
- ▶ Transactions
- ▶ Investment Firms/Investments
- ▶ Key Developments
- ▶ Securities Summary
- ▶ ESG
- ▶ Transcript Sentiment Scores
- ▶ Indices
- ▼ Lists
  - ▼ Lists
    - My Lists

Parameters

My Lists

In

BSE100

BSE100

My Lists [KeyField: savedlist]  
My Lists  
[Lists] / [Lists] / [My Lists]

**ADD** DONE CANCEL

## Add Indicator

If you wish to add more companies, you can select **Add companies** >> Click on **Display Columns** to add required Indicators.

Currency  OPEN SAVE SETTINGS NEW SCREEN CREATE ALERT

CRITERIA  Comparables/Peer Analytics **ADD COMPANIES**

1 My Lists : BSE100 28 X

Add Criteria  ADD

**DISPLAY COLUMNS** **RUN SCREEN**

Select the required indicator and period range, then click on the right arrow and Click on Apply

### Field Selector

Field Search

OPEN SAVED FIELDS AS REPORT    SAVE AS REPORT

Category

- ▶ Company Details
- ▶ Financials
- ▶ Industry Data
- ▶ Market Data
- ▶ Estimates
- ▶ Trading Multiples
- ▶ Investment Firms/Investments
- ▶ ESG
- ▶ Transcript Sentiment Scores

Parameters    Ranking

Period Type  
Fiscal Year

Period  
Latest Fiscal Year

Selected Fields

Entity Name

Entity ID

- Company Name
- Ticker
- Exchange
- Primary Industry
- Market Capitalization (\$M)
- Total Revenue [Latest Fiscal Year] (\$000)

EXPORT FIELDS    **APPLY**    CLOSE

**Total Revenue** [KeyField: 329251, SP\_TOTAL\_REV]  
 Universal revenue attributable to the ongoing operations  
 [Financials] / [S&P Global Universal Fundamentals] / [Key Financials] / [Total Revenue]

Click on Run Screen to view the output data

Currency **U.S. Dollar (USD)**    OPEN    SAVE    SETTINGS    NEW SCREEN    CREATE ALERT

CRITERIA    Comparables/Peer Analytics    ADD COMPANIES

1    **My Lists : BSE100**    28 X

Add Criteria    Add Search Criteria    Q    ADD

**RUN SCREEN**

DISPLAY COLUMNS

Click on export to download the data

Currency **U.S. Dollar (USD)**    OPEN    SAVE    SETTINGS    NEW SCREEN    CREATE ALERT

CRITERIA

**Results (28)**    DISPLAY COLUMNS    Select a Template    OPTIONS    WHERE IS MY COMPANY?    Export    Results As Table Function    **EXPORT**

**Custom Screener Report 1**    +

DELETE SELECTED    SAVE LIST    SHOW 250    RECORDS

ENTITY NAME	ENTITY ID	COMPANY NAME	TICKER	EXCHANGE	PRIMARY INDUSTRY
<input type="checkbox"/> ACC Limited (NSEI:ACC)	4982016	ACC Limited	ACC	NSEI	Construction Materials
<input type="checkbox"/> Adani Enterprises Limited (BSE:512599)	4347779	Adani Enterprises Limited	512599	BSE	Trading Companies and Distributors
<input type="checkbox"/> Adani Ports and Special Economic Zone Limited (NSEI:ADANIPTS)	4569492	Adani Ports and Special Economic	ADANIPTS	NSEI	Marine Ports and Services
<input type="checkbox"/> Adani Total Gas Limited (NSEI:ATGL)	6489408	Adani Total Gas Limited	ATGL	NSEI	Gas Utilities
<input type="checkbox"/> Ambuja Cements Limited (BSE:500425)	4981811	Ambuja Cements Limited	500425	BSE	Construction Materials
<input type="checkbox"/> Apollo Hospitals Enterprise Limited (NSEI:APOLLOHOSP)	4553568	Apollo Hospitals Enterprise Limite	APOLLOHOSP	NSEI	Healthcare Facilities
<input type="checkbox"/> Ashok Leyland Limited (NSEI:ASHOKLEY)	4315360	Ashok Leyland Limited	ASHOKLEY	NSEI	Machinery: Construction and Heavy Trucks
<input type="checkbox"/> Asian Paints Limited (NSEI:ASIANPAINT)	4985577	Asian Paints Limited	ASIANPAINT	NSEI	Specialty Chemicals
<input type="checkbox"/> AU Small Finance Bank Limited (BSE:540611)	6663768	AU Small Finance Bank Limited	540611	BSE	Bank
<input type="checkbox"/> Aurobindo Pharma Limited (NSEI:AUROPHARMA)	4810875	Aurobindo Pharma Limited	AUROPHARMA	NSEI	Pharmaceuticals
<input type="checkbox"/> Avenue Supermarts Limited (NSEI:DMART)	5207219	Avenue Supermarts Limited	DMART	NSEI	Food Retail