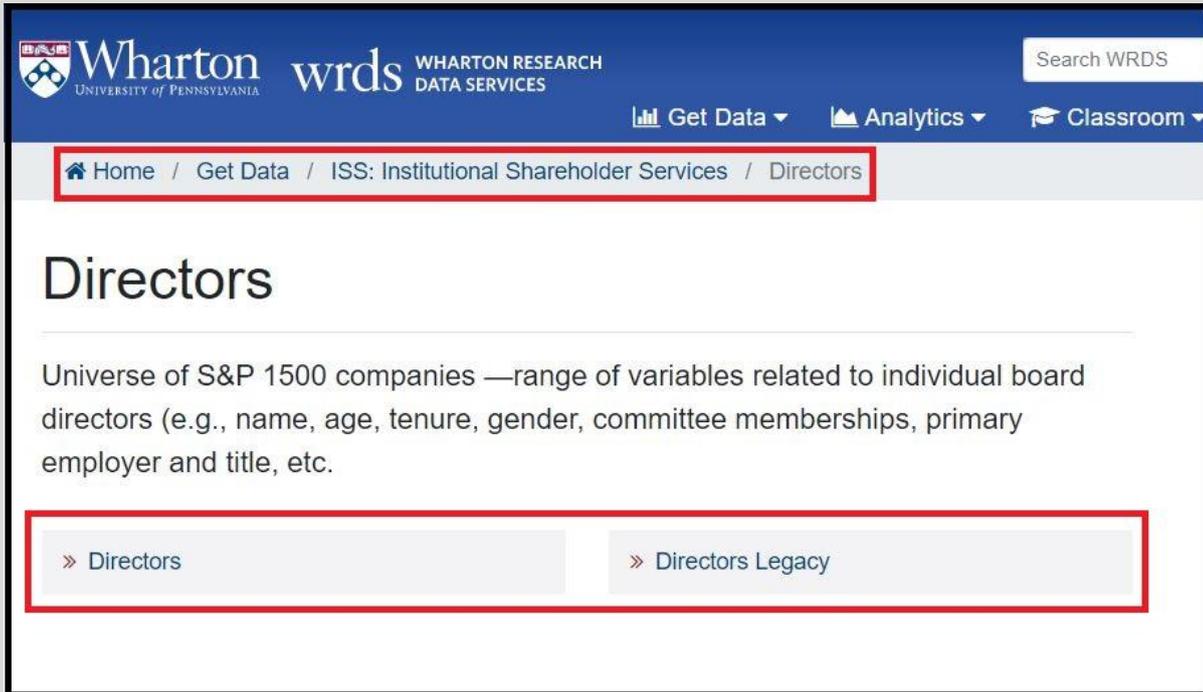


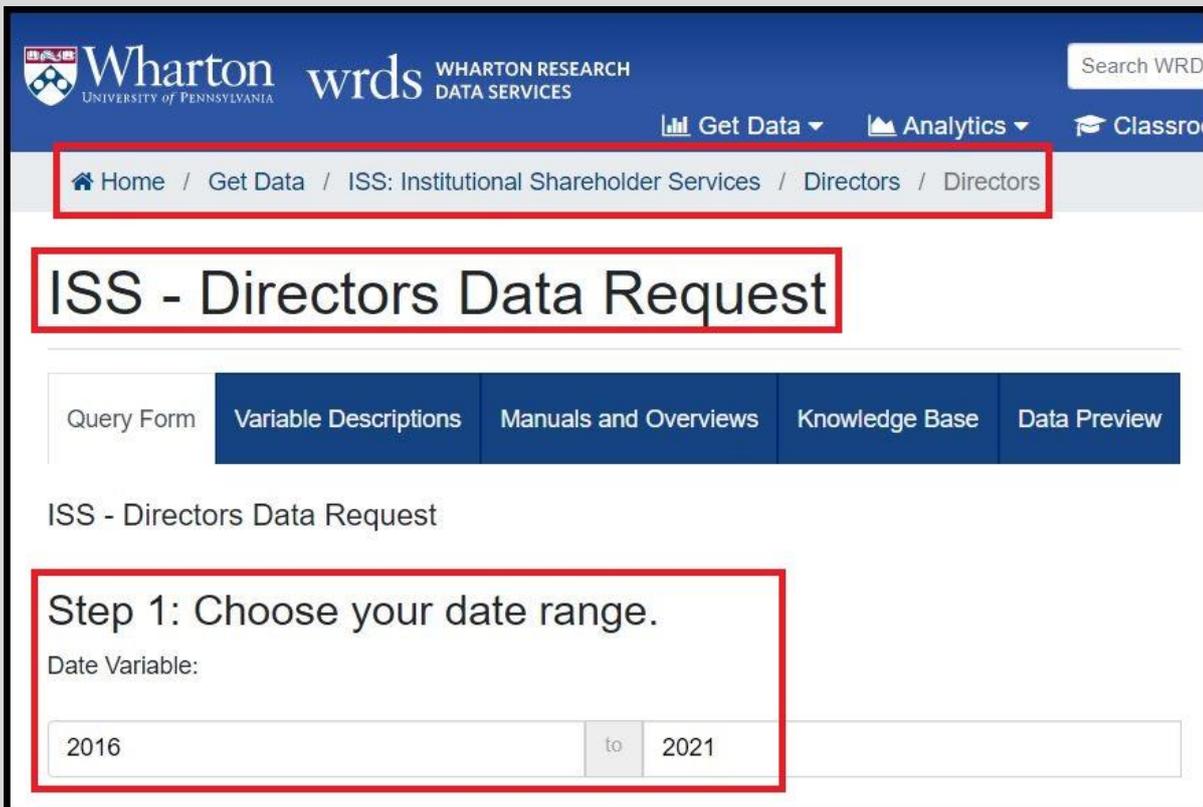
Import/Export in Institutional Shareholder Services

Login to Institutional Shareholder Services and select your required data module.



The screenshot shows the Wharton WRDS website interface. The top navigation bar includes the Wharton University of Pennsylvania logo, the 'wrds' logo, and the text 'WHARTON RESEARCH DATA SERVICES'. A search bar labeled 'Search WRDS' is on the right. Below the navigation bar, a breadcrumb trail is highlighted with a red box: 'Home / Get Data / ISS: Institutional Shareholder Services / Directors'. The main heading is 'Directors'. Below it, a description reads: 'Universe of S&P 1500 companies —range of variables related to individual board directors (e.g., name, age, tenure, gender, committee memberships, primary employer and title, etc.)'. At the bottom, two buttons are highlighted with a red box: '>> Directors' and '>> Directors Legacy'.

Select your required date range.



The screenshot shows the 'ISS - Directors Data Request' page on the Wharton WRDS website. The top navigation bar is the same as in the previous screenshot. The breadcrumb trail is highlighted with a red box: 'Home / Get Data / ISS: Institutional Shareholder Services / Directors / Directors'. The main heading is 'ISS - Directors Data Request'. Below the heading, there are five tabs: 'Query Form', 'Variable Descriptions', 'Manuals and Overviews', 'Knowledge Base', and 'Data Preview'. The 'Variable Descriptions' tab is selected. Below the tabs, the text 'ISS - Directors Data Request' is displayed. A red box highlights the 'Step 1: Choose your date range.' section. Underneath, it says 'Date Variable:' followed by a date range selector. The selector shows '2016' in the first input field, 'to' in a small button, and '2021' in the second input field.

Click on Code Lookup

Step 2: Apply your company codes.

What format are your company codes?

TICKER CUSIP

Select an option for entering your company codes:

Company Codes Code List Name

Please enter company codes separated by a space.

Example: IBM MSFT AAPL

Save this code list to Saved Codes

[Code Lookup: ISS (formerly RiskMetrics)]

-----Select Saved Codes List-----

Choose from your saved code lists.

Browse... Company Codes Upload File

Upload a plain text file (.txt), having one code per line.

Search the entire database

This method allows you to search the entire database of records. Please be aware that this method can take a very long time to run because it is dependent upon the size of the database.

Search for the required companies one by one and add a ticker or other codes.

After adding all company codes, click on Add Attribute Codes to Query.

AMERICAN EXPRESS CO. Starts With Is Exactly Contains

The **WRDS Attribute Search** helps you find attributes (such as company identifiers and names, incorporation information, and addresses) about entities (such as companies, indexes, and funds).

1. Start by entering a search term.
2. After the results are displayed, click on identifiers to add them to your list.
3. Last, choose whether to insert your selections into your web query or to download them as a text file.

If you need more help, take a moment to read the full step-by-step instructions to using this tool, including a complete list of identifiers available.

Your search returned 2 results.

Copy CSV Excel

CUSIP FULL	ENTITY NAME	RISK COMPANYID	SIC	TICKER
025816109	AMERICAN EXPRESS CO.	5191		AXP
025816109	AMERICAN EXPRESS CO.	5191	6199	AXP

Showing 1 to 2 of 2 entries
Here are your codes. Use the x next to any item to remove it from your list.

x ABI x AM x AXP

Download as Text Clear List Add Attribute Codes to Query

If you wish to import the company codes list, Select the Browse option to upload the company code text file.

Step 2: Apply your company codes.

What format are your company codes?

TICKER CUSIP

Select an option for entering your company codes:

Company Codes

Code List Name

Please enter company codes separated by a space.
Example: IBM MSFT AAPL

Save this code list to Saved Codes

[Code Lookup: ISS (formerly RiskMetrics)]

-----Select Saved Codes List-----

Choose from your saved code lists.

Browse... Codes.txt
Upload a plain text file (.txt), having one code per line.

Search the entire database

This method allows you to search the entire database of records. Please be aware that this method can take a very long time to run because it is dependent upon the size of the database.

Select your required indicators

Step 3: Choose query variables.

How does this work?

Q Search All 6/62 **Company Information 0/6** Director Information 6/10 Other Director

Select All (4)

- Female? (FEMALE)
- Year Service Began (DIRSINCE)
- Year of Termination (YEAR_OF_TERMINATION)
- Year Service Ends (YEAR_TERM_ENDS)

Selected Clear All (6)

- IRRC Director ID (DIRECTOR_DETAIL_ID)
- Director - Last Name (LAST_NAME)
- Director - First Name (FIRST_NAME)
- Director - Age (AGE)
- Director - Full Name (FULLNAME)
- Country of Employment (COUNTRY_OF_EMPL)

How does this work?

Select your output file format and date format and click on Submit Form.

Step 4: Select query output.

How does this work?

Select the desired format of the output file. For large data requests, select a compression type to expedite downloads. If you enter your email address, you will receive an email that contains a URL to the output file when the data request is finished processing.

Output Format <ul style="list-style-type: none"><input type="radio"/> fixed-width text (*.txt)<input type="radio"/> comma-delimited text (*.csv)<input checked="" type="radio"/> Excel spreadsheet (*.xlsx)<input type="radio"/> tab-delimited text (*.txt)<input type="radio"/> HTML table (*.htm)<input type="radio"/> SAS Windows_32 dataset (*.sas7bdat)<input type="radio"/> SAS Windows_64 dataset (*.sas7bdat)<input type="radio"/> SAS Solaris_64 dataset (*.sas7bdat)<input type="radio"/> dBase file (*.dbf)<input type="radio"/> STATA file (*.dta)<input type="radio"/> SPSS file (*.sav)	Compression Type <ul style="list-style-type: none"><input checked="" type="radio"/> Uncompressed<input type="radio"/> zip (*.zip)<input type="radio"/> gzip (*.gz)	Date Format <ul style="list-style-type: none"><input checked="" type="radio"/> YYYYMMDDn8. (e.g. 19840725)<input type="radio"/> DATE9. (e.g. 25JUL1984)<input type="radio"/> DDMMYY6. (e.g. 250784)<input type="radio"/> MMDDYY10. (e.g. 07/25/1984)<input type="radio"/> DDMMYY10. (e.g. 25/07/1984)<input type="radio"/> YYYYMDDs10. (e.g. 1984/07/25)
--	---	--

E-Mail Address *(Optional)*

Custom Field *(Optional)*

Save This Query *(Optional)*

Notes on this Query *(Optional)*

Check the query status and click on the output files link.

[Home](#) / [Your Account](#) / [Queries](#) / Query 6546929, for risk_directors

Query 6546929, for risk_directors

Status:	Success	<input type="button" value="Rerun"/>
Product:	risk_directors	
Results:	Result Size: 6 KIB	Result Count: 9 Rows
	Output Files: • ~/wrds_query_output/wen1fijhsb3jkrmk.xlsx	
Results are also in your home directory at: ~/wrds_query_output/ . See WRDS Cloud: Access Web Query Output for more details.		
Timing:	Elapsed Time: 9 seconds	Submitted: 2022-12-29 06:55
	Work Begun: 2022-12-29 06:55	Work Finished: 2022-12-29 06:55
Input Parameters:	<input type="button" value="Toggle Input Parameters"/>	