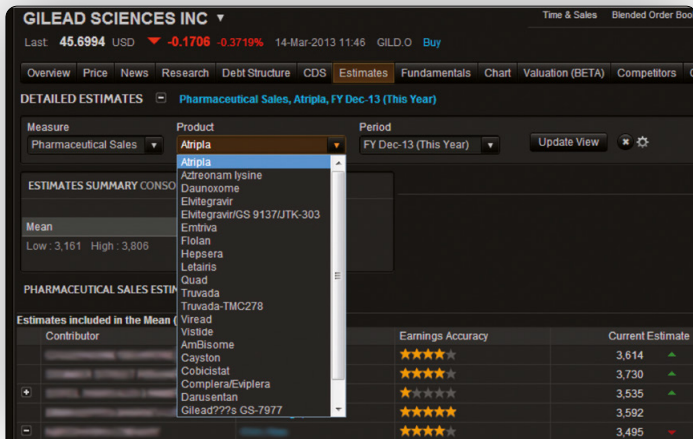


# REFINITIV<sup>®</sup> I/B/E/S<sup>®</sup> KEY PERFORMANCE INDICATORS

Newly expanded offering helps you outperform with more informed decisions

In today's competitive market, generic financial measures alone do not provide the complete picture of a company's health. Granular, industry-specific information can be a critical factor in determining the success of an enterprise. You need tools to effectively evaluate a business and how likely it is to perform in the medium and long terms – tools like key performance indicators (KPIs), which are quantifiable measurements that reflect the critical success factors of an organization.



## Deeper insight and analysis to stand out from the competition

Refinitiv<sup>®</sup> I/B/E/S<sup>®</sup> Key Performance Indicators are a powerful and rapidly expanding new suite of forecast content. To give you that extra edge, this industry-specific content is available alongside existing estimates data like EPS and Recommendations, and is available on over 260 key metrics, across 15 industries.

- Estimates and Actuals provided together with derived Surprise data, enable you to analyze broker expectations against reported results
- Consensus and Detail forecasts are available on an annual and interim basis. Same store sales (SSS) data is available on a monthly and quarterly basis
- For SSS and Pharmaceutical Sales, business segment and product breakdowns are available, along with deep historical content
- Clients can cross-pollinate the reported values from Fundamentals database with estimated to get access to richer history. The fundamentals KPIs have 70% overlap with Estimates KPIs and are available across 202 standardized metrics, 15 industries, with annual history back to 1997

## Key benefits

- Identify trends within the Airlines, Banking, Energy, Insurance, Pharmaceuticals, Real Estate, Retail/ Restaurants and Technology industries
- Make informed portfolio allocation changes
- Target investment opportunities
- View a firm's store or drug expectation at a detail or aggregate level

## Metrics availability

Over 260 industry-specific key performance indicators (KPI) measures across 15 industries are available via I/B/E/S Quantitative File System, I/B/E/S History, I/B/E/S Real-Time, Eikon and Eikon Excel.



## Global KPI coverage by industry

Airlines & Transportation	686 Passenger Transportation, Freight and Logistics Services
Banking & Investment Services	1,173 Banking Services, 534 Investment Banking & Investment Services
Energy	3,058 securities across Integrated Oil & Gas, Exploration & Production, Refining & Marketing
Home Builders	1,128 Construction & Engineering, Home Building, Construction Supplies and Materials
Hotels & Entertainment Services	1,087 Residential & Commercial REITs, Hotels & Entertainment Services
Insurance	340 securities across Life & Health Insurance, Multiline, Property & Casualty, and Reinsurance
Metals & Mining	1,063 Mineral Resources
Pharmaceuticals & Healthcare	2,100 unique drugs across 2,055 Biotech/Pharmaceutical securities and Health Services
Real Estate	1,244 Real Estate Operations securities
Retail & Restaurant	1,710 unique brands/segments across 4,692 Retail & Restaurant securities
Technology	1,807 Technology Equipments, Semiconductor & Equipments, 1,050 Software & IT Services
Telecommunication	1,383 Communication, Networking, Media & Publishing Services

## Generic

70 Generic new measures introduced include Depreciation and Amortization, Cash Flow from Financing, Cash Flow from Investing, Cash Flow from Operations, Total Assets, Operating Expenses and Stock Based Compensation.

Existing KPIs are now expanded to other sectors; this includes Total Assets, Operating Expenses and Stock Based Compensation.

## Airlines

Eleven measures collected, notably Available Seat Kilometers (ASK), Available Seat Miles (ASM), Cost per ASK, Cost per ASM, Passenger Load Factor, Revenue Passenger Kilometers and Revenue per ASM.

The Airline sector includes companies whose business interests are involved in air transport services for paying passengers and freight.

## Banking/Finance

Thirty-two measures collected, including Loan Loss Provision, Net Interest Income, Deposits and Assets Under Management. Over 30 KPIs are collected for this sector so you can perform highly detailed analysis of forecasted and historical performance across income, expenditure, assets and liabilities.

## Energy

Thirty measures collected, notably various types of Production Per Day (Oil, Gas, etc.), Upstream/Downstream Income, Exploration Expense, Distributable Cash Flow and Maintenance CapEx.

The Energy sector includes companies whose business interests are involved in the production, refining and supply of any form of energy. This also includes the exploration, transportation, marketing and research involved in energy creation and supply. Analysis of this sector requires a significant level of knowledge and understanding, as it is particularly sensitive to changes (or the perception of changes) to supply and demand. The KPIs relevant to this sector are designed to allow analyses that can take into account changes in supply on several different levels.

## Insurance

Twenty measures collected, including Net Premiums (both Written and Earned), Embedded Value and Combined Ratio. Includes companies that provide any type of Insurance, including Life & Health Insurance, Multiline Insurance, Property and Casualty Insurance and Reinsurance.

The relevant KPIs give you the opportunity to perform highly detailed analysis of forecasted and historical performance of income, expenditure, assets and liabilities.

## Pharmaceuticals

Pharmaceutical Drug Unit Sales are collected across 120+ companies and on 1,800 unique drugs. Data includes revenue associated with individual drug brands, across an aggregate and geographic level.

We link these drugs on multiple levels depending on the business relationship, chemical ingredients and purpose associated with each – allowing not only specific forecast data for each separate drug but also aggregate sales of generic ingredients and instances where global revenues are shared as a joint venture between companies.

## Real Estate

Thirty measures collected, notably three flavors of Funds from Operations, including NAREIT-Defined, Cash Available for Distribution, Development Costs and Net Operating Income, EBITDAR and NAV per Share.

Real estate investment trusts (REITs) are corporate entities that own, operate, acquire, develop and manage real estate assets on behalf of their shareholders. The KPIs for REITs will give an improved picture of cash flow from operations compared to net income, including non-cash related expenses such as depreciation and amortization.

## Retail/Restaurants

Same Store Sales (SSS) for retailers and restaurants are collected across 340+ companies and 550 unique brands/segments for Global market. On a monthly, quarterly and annual basis, this content can be viewed on a consolidated company basis, geographic and individual store banner level segments, when available.

## Technology

Eight measures collected, notably: Compensation Ratio, Net Revenue, SG&A Expense and R&D Expense. Seven measures are now considered Generic.

The Technology sector includes companies that are involved in the manufacture and sale of technological goods and services. The KPIs relevant to this sector give you the opportunity to perform highly detailed analysis of forecasted and historical performance of income and expenditure.

## Telecommunication

Seven measures collected, notably includes Subscriber Acquisition Cost (SAC), Subscribers, Net Subscriber Additions, Churn (%) and Access Line.

The Telecommunication sector includes companies that are involved in Communication & Networking and Telecommunication Services. The KPIs relevant to this sector give you the opportunity to perform highly detailed analysis of forecasted and historical performance of income and expenditure.

**To learn more about the newly expanded I/B/E/S Key Performance Indicators offering, contact your local sales representative.**

Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

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