

FP Advisor User Guide

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Preface

What is FP Advisor?

FP Advisor contains corporate, financial and securities information of North American-listed Canadian incorporated and/or headquartered companies plus select large private Canadian and Crown companies.

FP stands for *Financial Post*, which first published its Surveys of Companies in 1926 and contains financial information dating back to 1840.

Searching FP Advisor

FP Advisor modules are located on the left hand side of the Infomart website, which contains 16 sections as described herein. Each section of FP Advisor contains various search functionalities, most of which allow for basic (default) and advanced search options. A description of the various searches for each section is outlined within the user guide.

For searches with various fields/filters that can be chosen, selecting more options and/or providing more details will narrow your search result(s). All sections offering an advanced search function enables users to save their searches.

Sections including a glossary provide a definition of the words and terms used or a description of the symbols and abbreviations used within that section's universe.

Any references to FP 500 pertain to the FP Magazine annual ranking of Canadian companies (both public and private) by operating revenue. Rankings may be affected due to revenue recognition guidelines, as well as certain private companies not being included due to lack of disclosure.

Users with user IDs can change the default number of search results using the Display link in Settings located at the bottom of the left menu pane. IP-authenticated users do not have access to this function.

Abbreviations

The following is a list of abbreviations used throughout the user guide:

DBRS – Dominion Bond Rating Service

DoD – Directory of Directors (one of the coverages in FP Advisor)

EPS – Earnings Per Share

GICS – Global Industry Classification Standard

I/B/E/S – Institutional Brokers' Estimate System

NAICS – North American Industry Classification System (U.S.)

ROE – Return on Equity

SIC – Standard Industrial Classification (U.S.)

FP Corporate Snapshots

Provides a concise report on all current and previously North American-listed Canadian companies, FP 500 companies, and select Crown corporations.

Basic Search

Conduct company searches by name or stock symbol. Searches may also include or be restricted to company location (city and/or province and/or country). Upon obtaining search results, click on the company you wish to view.

Snapshots of **Active** companies will include the following information:

- Head office information, contact name, FP 500 rankings (if applicable) and sub-industry.
- A brief description of the company's business/operation(s).
- Key executive(s). Clicking on a person's name will bring up a page showing:
 - The companies in which the person is a member of. Click on a company to view its [Corporate Survey](#).
 - [FP DoD](#) profile link. Click on the person's name to view their profile page.
 - Any additional coverages in which the person may be included in as described in [Additional Databases](#) (excluding Equifax Commercial Law Record and Industry Canada – Canadian Corporate Names). Clicking on a company will take you to its page under that corresponding coverage.
- Other FP Advisor coverage(s) in which the company is included in (shown by those that are highlighted) as described in the user guide. Click on any of the highlighted links to take you to that coverage for the company.
- The top five industry players (based on revenue) in which the company is involved in. Clicking on any of those companies will take you to that company's snapshot.
- Various financial ratios as of the previous business day.
- Select financial items (revenue, net income, total assets, EPS and ROE) for the past three annual periods.
- The most recent quarterly financials compared to the previous corresponding period.
- Any news on the company from the past 30 days.

Snapshots of companies classified as **None** (defunct, private, etc.) or **No Recent Update** (no news within the last 18 months) will only outline the following: head office information and, if available/applicable, any of the other relevant information found in this section as outlined above; key executive(s); top industry

players; and any news on the company from the past 30 days. Accessing these coverages is the same as above, as is clicking on the other FP Advisor coverage(s) in which the company is included in.

Note:

Any company with a **None** or **No Recent Update** status whose coverage was previously included in and linked to the [FP Corporate Analyzer](#), [FP Investor Reports](#) and/or [FP Historical Reports](#) universe(s) are greyed out under FP Advisor Coverage and no longer available (i.e. Shoppers Drug Mart Corporation prior to its March 2014 acquisition by Loblaw Companies Limited). However, a search for Shoppers under the FP Historical Reports tab will provide the final PDF of the company as well as the PDFs stored from previous years.

Industry Search

Browse for company snapshots based on GICS. Choose from the list of sectors (2-digit GICS), which are broken into industry groups (4-digit GICS), which are then broken into industries (6-digit GICS), then finally into sub-industries (8-digit GICS). Each sub-industry offers a brief description of the companies included. The sub-industries are linked to the company snapshots. All sub-industry lists are exportable into Microsoft® Excel.

As an example, if you want to view snapshots for companies in the **Automobile Manufacturing** industry, search as follows:

- Click on the (25) Consumer Discretionary link from the list of sectors listed at the top.
- Look for the corresponding industry group, in this case (2510) Automobiles & Components.
- Then look for the corresponding industry, which would be (251020) Automobiles.
- Finally, click on the sub-industry (25102010) Automobile Manufacturers.

Upon choosing the sub-industry, corresponding companies will be listed in alphabetical order. The list of companies may be sorted by revenue, net income, assets, cash flow and employees, as well as FP 500 Revenue, FP 500 Net Income and FP 500 Assets, by clicking on such heading at the top. Click on the company you wish to view the snapshot for.

FP Corporate Surveys

Search for detailed corporate and investment information on all current and previously North American-listed active Canadian companies, FP 500 companies and select Crown corporations.

Each corporate survey consists of the following sections:

- Quick reference data, including major shareholder(s), number of employees (if available), SIC Code(s), GICS, NAICS Code(s), incorporation date(s) and service agents used.
- A stock activity chart (default view is 12-month period).
 - You have the option to view a chart based on various other time periods by clicking on one of the tabs found immediately below the chart.
- Financial ratios as of the previous business day.
- An in-depth, detailed description of the company's business and operations.
- Recent significant development(s) items and merger and acquisition (M&A) activity within the last 18 months.
- Predecessor detail, including name changes.
- Directors and officers. Click on an individual's name to view their [FP DoD](#) profile.
- Related companies (corporate structure), including wholly (100%) and partially (>50% and <100%) owned subsidiaries, and investments (0% to 50%). Click on any related company that is highlighted in blue (primarily other public companies) to be taken to that company's separate coverage.
- Capital stock authorized and outstanding as at the most recent date information is available.
 - When multiple classes of stock are issued and outstanding, detailed descriptions of each stock class are provided.
 - Any capital stock classified as debt will be denoted accordingly.
- Price ranges for each of the last five calendar years.
- Capital stock changes within the last 18 months.
- Dividends (if applicable).
- Outstanding long-term debt at the most recently updated annual period. **Note:** Only shown for companies included in the [FP Historical Reports](#) database.
- Annual financial statistics for the current fiscal year and comparative fiscal year. **Note:** Information is exportable to Microsoft® Excel.
- Latest results, showing the most recently available quarterly financial statistics.
- Historical financial summary of the last five fiscal periods showing operating revenue, net income and EPS. **Note:** All figures are shown on an as reported basis.

Basic Search

Conduct company searches by name or stock symbol. Searches may also include or be restricted to company location (city and/or province and/or country). Upon obtaining search results, click on the company you wish to view.

To quickly jump to any of the aforementioned sections within a corporate survey, click on the highlighted “Document Navigation” tab immediately to the right on the company’s name and select the section you wish to go to.

In the top right hand corner, the other FP Advisor coverage(s) the company is included in is/are indicated and highlighted. Click on any of the links to take you to that coverage for the company.

Advanced Search

Searches can be expanded to more comprehensive filters including:

- Exchange (multiple selections allowed).
- Indexes, tiered exchange issuers, FP 500 and Clean Technology (Cleantech). Choose any, all or a combination of the options available.
- Company type and/or sub-type (multiple selections allowed).
- Current incorporation jurisdiction (options selectable from dropdown menu).
- Incorporation year.
- Director or officer name.
- Subsidiary.
- Major shareholder.
- Type of service agent(s) – auditor, banker, lawyer, transfer agent (options selectable from dropdown menus).
- SIC Code(s), GICS and NAICS codes (multiple selections allowed).
- Issuer bid (normal course or substantial) and dividend reinvestment plan.
- Text search. Enter a word or phrase to be found in the operations and/or capital stock section(s).
- Financial search (a criterion for each of the dropdown options described below must be selected).
 - Choose one of the financial categories you wish to view. **Note:** Oil & gas, mining, telecom, wood products, utilities and drillers operating statistics are compiled on an ongoing basis. Data for past years are updated on an as available basis.
 - Select one of the data items within the financial category chosen.
 - Select a year.
 - Select an operation. Enter a value in relation to the operation selected.

- To conduct numerous financial searches at once, click on the 'add another line' button and repeat the option selection process.
- Results may be chosen to be shown in ascending or descending order, or sorted alphabetically.

Issuer Bid Search

Conduct searches on companies which have participated in share repurchase programs. Searches may be conducted on either normal course issuer bids or substantial issuer bids. Searches will display a company's history of issuer bids in descending order, which may date back to 2000 as the earliest date. The search features and functionality are similar to, and to be used, as that in the Advanced Search.

FP Corporate Analyzer

Provides quick access to share price statistics, company briefs, capital stock, current operations, M&A activities, debt, 10 years of financial statement items, ratios, market data and I/B/E/S estimates for over 1,400 publicly traded Canadian companies.

Either of the following are criteria for companies to be included in the database:

- Has annual financial data and listed on the Toronto Stock Exchange (TSX); or
- Listed on the TSX Venture Exchange and has annual revenue greater than Cdn\$10,000,000.

Each corporate analyzer consists of the following sections:

- Head office information, key executive and financial officers, and exchange listing(s).
- Share price statistics (numerous and varying statistics shown).
- A brief description of the company's business/operation(s).
- Capital stock authorized and outstanding as at the most recent date information is available.
- An in-depth, detailed description of the company's business and operations.
- Latest results, showing the most recently available quarterly financial statistics.
- Outstanding long-term debt at the most recently updated annual period. **Note:** Only shown for companies included in the [FP Historical Reports](#) database.
- General information, including certain financial figures and company data (shares outstanding and number of employees and shareholders, if available).
- Annual figures, for the last 10 fiscal years, for specified sections and items contained within each of the balance sheet, income statement and cash flow statement.
- Numerous financial ratios for each of the last 10 fiscal years.

- Miscellaneous data, including pension information and audit fees, for the last 10 fiscal years.
- Quarterly income statement data for the last 12 quarters.
- Market data.
- Thomson Reuters I/B/E/S estimates, which are updated weekly.

Notes:

All figures contained in the Corporate Analyzer universe are shown on an as reported basis and reported in Canadian dollars.

All financial information, ratios, market data and estimates are exportable to Microsoft® Excel.

Search

Search by company name or stock symbol. Upon obtaining search results, click on the company you wish to view.

To quickly jump to any of the aforementioned sections within a corporate analyzer, click on the highlighted “Document Navigation” tab immediately to the right on the company’s name and select the section you wish to go to.

In the top right hand corner, the other FP Advisor coverage(s) the company is included in is/are indicated and highlighted. Click on any of the links to take you to that coverage for the company.

Browse

Narrow your search for companies across the entire analyzer universe by company group and industry/portfolio. The number in brackets beside each of the options in both menus represents the number of companies which fall within the category.

- Choose one of the company groupings in which to conduct a search.
- From the options available upon choosing a company group, select companies from the industry/portfolio menu by any of industry group, industry or sub-industry.

As you select from both options, the Company List will display the companies which fall within the selected options. Choose a company from the list and click ‘Display Company’ to view its analyzer page.

Portfolios

Create your own portfolio of companies to track as follows:

- Click on the company group of interest.

- Select the industry group, industry or sub-industry of interest.
- Click on the company/companies of interest from the list generated to be added to your portfolio.
 - To remove a company, click on the company name and then the 'Remove Company' button.

You may create as many portfolios as desired.

Fundamentals

Compare individual financial (annual and quarterly) and spot data items across the entire analyzer universe by company group and industry/portfolio. Choose from both menus in the same way as described in the Browse section. From there:

- Select one of the data type options in the financial view menu.
 - Upon choosing a data type, a list of financial items will appear. Only one may be chosen. **Note:** For annual and quarterly data, date fields will be displayed. Select the range of dates to compare across.
- Click on 'Search' to view the report. Companies are listed in alphabetical order, and may be sorted in descending order by clicking on any of the year(s) in the blue heading.

Click on a company to view its analyzer profile.

Screens

Similar to the Fundamentals section, but allows you to search for companies that satisfy multiple financial selection criteria. Choose to sort by ascending or descending order, or by company.

Click on a company to view its analyzer profile.

FP Investor Reports

Provides corporate and financial information combined with buy/sell recommendations and industry standard ratios for the top 450 publicly traded Canadian companies. Search by company name or stock symbol.

Information found in company profiles include:

- Forecasts provided by Thomson Reuters pertaining to EPS and cash flow per share for the current year and the following year, as well as the next four quarters.
- Quarterly revenue and EPS figures for the last five fiscal years.

- The top 3 in the industry by market capitalization. Clicking on a company will take you to its [Company Snapshot](#).
- Numerous ratios for the previous seven annual periods.
- Latest quarterly results.

To quickly jump to any of the aforementioned sections within an investor report, click on the highlighted “Document Navigation” tab immediately to the right on the company’s name and select the section you wish to go to.

In the top right hand corner, the other FP Advisor coverage(s) the company is included in is/are indicated and highlighted. Click on any of the links to take you to that coverage for the company.

FP Historical Reports

Provides detailed descriptions on operations, 7-year consolidated financial statements, capital stock changes and company history dating back to incorporation for the top currently and formerly traded Canadian companies. Included are large companies with investor interest as measured by trade value. **Note:** Some no longer have high trade value as they did at the time of original inclusion.

Search by company name or stock symbol. Click on the company name to view the most up-to-date historical report information and coverage. To view the coverage in PDF format, click on ‘Current’ under PDFs immediately to the right of the company name. Also shown on the search results page is a list of the company’s former name(s), stock symbol(s) and status. Those with an ‘Active’ coverage status contain up-to-date information.

Historical reports are a more in-depth version of a [Corporate Survey](#). All sections contained in a Corporate Survey are found in a Historical Report, excluding a stock chart, as well as the following:

- Comparative data for the last five fiscal years, found at the top of the report. **Note:** All figures are shown on an as reported basis.
- All M&A activity of the company dating back to 2005.
 - M&A transactions of wholly owned subsidiaries (i.e. through acquisition) that are linked to the company under Related Companies are also included within the company’s M&A activity.
- Under History, an in-depth look of the company’s historical developments since incorporation. Any historical information of predecessor companies (i.e. merged into or acquired by the company) may also be detailed.

- All capital stock changes available from the time the company was incorporated.
- Quarterly earnings for the current and previous seven fiscal years.
- All items in the financials (balance sheet, income statement and cash flow statement) are broken out and shown for the seven most recent fiscal years (on an as reported basis).
- At the end of the report, a historical summary of all fiscal years of the company (on an as reported basis) are shown. Any historical financial summary information of predecessor companies (i.e. merged into or acquired by the company) may also be shown.

To quickly jump to any of the aforementioned sections within a historical report (non-PDF), click on the highlighted “Document Navigation” tab immediately to the right on the company’s name and select the section you wish to go to.

In the top right hand corner, the other FP Advisor coverage(s) the company is included in is/are indicated and highlighted. Click on any of the links to take you to that coverage for the company.

Notes:

A PDF for a fiscal year is created/generated once all company documents for that annual period have been filed.

Previous historical reports are available for viewing by clicking on a yearly PDF listed below ‘Current’.

Companies that were previously included but since acquired (i.e. Shoppers Drug Mart Corporation) or have been downgraded from a historical report coverage will have a ‘Final’ PDF containing information to the date of acquisition/downgrade for the year in which it occurred. PDFs for previous years have been stored for viewing.

FP Industry Reports

Includes in-depth analysis of 30 industries in which the top 450 publicly traded Canadian companies compete, as organized by GICS, for the last five years (the current year and the four previous years which are archived).

Information within an Industry Report consists of:

- An industry recommendation as provided by **Value Sciences Inc.** This is found at the very top of each industry report.
- The latest quarterly results for up to 10 companies within the corresponding industry.

- A variety of ratios for each of the last seven years for the industry, as well as the 7-year industry average, as shown under Industry Data Bank.
- A list of all companies included, as found at the bottom of the page.

To view an Industry Report, click on one of the industries from the list. To view it in PDF, click on 'Current' to the far right of the industry group. To view any of the four previous PDFs archived, click on 'Archive' to open the dropdown menu, and select the year you wish to view.

FP Predecessor & Defunct

Consists of a record of changes to former publicly traded Canadian companies since 1929 with details of name changes, amalgamations, takeovers and acquisitions. Also includes companies being wound up, dissolved or companies whose charters have been canceled or struck from the provincial registers. Information is exportable into Microsoft® Excel.

Basic Search

Search by company name or stock symbol. Searches can be conducted by a former company name. A list of companies will show, with a list of (if any) former name(s) for each company. Stock symbol(s) will also show for any companies with an 'Active' coverage status. Click on a company to view a sequential list of changes.

Advanced Search

Searches may be conducted based on multiple fields:

- Company name or stock symbol.
- Company status (active or inactive).
- Industry.
- SIC Codes, GICS and NAICS Codes (multiple selections in either section is allowed).
- Type of event (multiple selections allowed).
- Incorporation history, as well as where the company incorporated from and to (multiple selections allowed).
- Text search. Enter a word or phrase to search by.
- Date range.

Once done generating a list based on the option(s) chosen, click on a company to view a sequential list of changes.

Note:

In the top right hand corner, the other FP Advisor coverage(s) the company is included in is/are indicated and highlighted. Click on any of the links to take you to that coverage for the company.

FP Mergers & Acquisitions

Contains information on mergers, acquisitions and divestitures involving Canadian companies dating back to 1994. Information is exportable into Microsoft® Excel (up to 2,000 records at a time).

The following are criteria for transactions to be included in the database:

- Deal value must be at least Cdn\$5,000,000. All deals involving foreign currencies are converted into Canadian dollars based on the exchange rate on the date the transaction was announced.
- At least a 10% interest must be bought.
- One of the target, vendor or acquiror must be Canadian-headquartered/based. **Note:** If a Canadian-based target asset is sold between foreign-based companies, the transaction is **not** included as none of the money remains in Canada.

Four types of transactions (based on the target) are included:

- Publicly traded – acquisitions of publicly traded companies in Canada, including statutory mergers, tender offers and minority-interest purchases.
- Divestiture – sales of corporate units, including divisions, wholly owned subsidiaries, and certain assets of both public and private vendor companies.
- Privately owned – acquisitions of all non-publicly traded Canadian-based companies and their assets.
- Foreign target – all companies and assets based outside of Canada.

Basic Search

Described below are various fields to search M&A transactions by. Any, all or a combination of the various fields can be used.

- In the Company Name field, enter a company name or word/phrase related to transactions sought. Transactions involving what was entered in the field search can be restricted to those pertaining to being the target, vendor and/or acquiror by checking off the corresponding boxes (any or all) below the field.
- For each of the target type, industry and SIC Code, and financial advisor, use the dropdown menu to make a selection.

- Set deal value filters to view deals that fall within the value range chosen.
- Set a range of dates in which transactions fall within.
- Transactions may be narrowed between pending, completed, and/or terminated.
- **IMPORTANT:** One or both of 'Announced' and 'Updated' beside the Status Dates line must be checked off. Otherwise all transactions entered in the database related to the search options entered will be shown, regardless of them falling out of the date range identified.

Transactions searched will then be shown in order based on the Announcement Date. The list of transactions will consist of, from left to right: the target, vendor (if available/applicable), acquiror (if available/applicable), deal value (in Canadian dollars), announcement date, updated date (if applicable) and deal status.

Click on a deal's target to view the transaction details, which shows the following:

- The industry type and the type of transaction (in the bold blue heading at the top).
- The target, vendor and/or acquiror involved, as well as their location and primary SIC Code.
 - A brief description of each may have been entered (the description pertaining to a public company is that as found in the [Corporate Survey](#)).
 - Transactions involving public companies will also show in their profile certain financial results (revenue, assets, net book value and net income) as of the annual year prior to the announcement date.
- The description of the transaction.

Advanced Search

Searches may be expanded to isolate a company type, industry, SIC Code, GICS and NAICS Code by any, all or a combination of the target, vendor, and/or acquiror.

Searches may also be conducted based on:

- One of the four transaction types (select any or all to view).
- The percentage bought.
- The payment consideration (cash, stock, debt assumption or other).
- By word or phrase, which can be searched within any of the deal or business descriptions.

Note:

Similar to a basic search, one or both of 'Announced' and 'Updated' beside the Status Dates line must be checked off.

Summary Reports

Generate year-to-date or monthly activity (past 24 months) summary reports for all industries or a specific industry as chosen from the menu.

The following pertain to the generation of summary reports:

- Transactions are recorded as they are announced, not as they are completed.
- Terminated transactions are not included in any of the statistical reports.
- Inclusion criterion for minimum deal value was increased from Cdn\$1,000,000 to Cdn\$5,000,000, effective May 1, 2009.

Year-to-Date

Select a year-to-date ending. Upon generating, the following will be shown for the chosen industry:

- A comparison of activity, showing the number of announcements and the value in millions of dollars for transactions related to the specified year and the 15 years prior to that.
- A breakdown of activity for the year chosen in comparison with the year prior, based on certain deal value ranges.
- The number and value of cross-border transactions for the year chosen in comparison with the year prior.

Monthly

Shown is the number of announcements and value of all transactions (in billions) for the last 24 months for any of the industries chosen. Both are shown in table and chart form. **Note:** Despite its availability, the year-to-date ending field is disabled when searching for monthly activity for months prior to the current period.

FP Dividends

Contains archived PDF reports of dividend payments, corporate changes, rights offerings, redemption announcements, purchase and offers, foreign currency, dividend reinvestment plans and dividend changes. Information goes back to 1998.

Search

Search by company name or stock symbol. Click on the company to view the dividend announcements for the security/securities that have paid dividends. Dividends are detailed for the current year as well as

the three preceding years, showing both the monthly/quarterly/semiannual/yearly dividend and dividend totals for each of those years.

A list of announced and pending dividends is listed at the bottom of the page under 'Ex-Dividend Dates'.

Record Archive

For **Archived** years, choose from the list of annual dividend records containing the following:

- Annual Dividend Record – a cumulative record of dividends of Canadian public companies and foreign interested stock paid during that year. Also contains for the year: all corporate name changes; splits or consolidations; rights offerings; companies with foreign currency dividends; companies offering dividend reinvestment plans; dividend changes (omitted, deferred, or increased); companies offering initial dividends, special dividends, special tax, capital gains, return of capital or base cost adjustment; and a list of companies offering dividends whose name changed.
- Mutual Funds – a cumulative record of distributions paid to holders of Canadian mutual funds during that year.
- 10-year Price Range – provides the high and low prices and closing price from that year, as well as the high and low prices for the preceding nine years. All securities listed on the Toronto, TSX Venture and Canadian Securities exchanges are included. Historical prices are fully adjusted for any stock splits or consolidations. Companies are listed alphabetically by corporate name.
- Stock Listing Changes (information available since 2008) – separate lists of securities delisted, suspended or newly listed (in that order) during that year.

For the **Current** year, available is:

- A weekly activity dividend report for the preceding week.
- A monthly dividend record (exact same format as annual dividend record report described above) containing year-to-date dividend records up to the end of the preceding month.

Note:

In the top right hand corner, the other FP Advisor coverage(s) the company is included in is/are indicated and highlighted. Click on any of the links to take you to that coverage for the company.

FP New Issues

Contains information, dating back to 1993, on new issues including public offerings and brokered private placements of Canadian companies, governments and agencies. Information is exportable into Microsoft® Excel.

Basic Search

To search by a specific company, enter the issuer name or stock symbol, and click on one of the four statuses and the range of dates in which the issues fall within. Click on the issue name to view the details of the issue.

To generate a list of all issuances that fall within the date range and status chosen, leave the issuer name and stock symbol fields blank.

- Debt issuances will contain information including the amount offered, issue price and yield, payment frequency, and the bookrunners (main underwriter or lead manager) and/or underwriters involved.
- Equity issuances will contain information including the number of shares offered, issue price, and the bookrunners and/or underwriters involved.

Advanced Search

Search under the following filters:

- Issuer name or stock symbol.
- Dealmakers league tables (default option; select one of the three).
- Corporate or government-related entities.
- Security types (default option) – click on ‘show me a list of security types’ to show dropdown for multiple security filters.
- Distribution type (default option).
- Type of offering and term.
- Market.
- Currency.
- Exchange (Canadian or U.S.).
- Incorporation (Canadian, federally and/or provincially, as well as foreign).
- SIC Code, GICS or NAICS Code (multiple selections may be chosen).
- Gross proceeds.
- Underwriter.
- Status of the issue(s) and the range of dates.

From the list, click on an issue name to view its details.

Lawyer/Auditor Search

Search issues by lawyer and/or auditor to view those in which either offered their services. Click on a status and a range of dates to generate a list. Click on an issue name to view its details.

League Tables

Same search functionalities as those described in Advanced Search, except the following:

- Cannot search by issuer name or stock symbol.
- One of the four credit types must be chosen (default option).
- View issues either by deals or tranches (default option).

A list will generate based on the credit type in order of the total amount in which they participated in deals. Click on the underwriter/lawyer to view all the deals they were involved in.

Summary Reports

Choose a summary report based on industry or equity activity.

Each of the following must also be selected:

- Either of the industry breakdowns (FP Industries or GICS Sectors).
- A start date.
- One of the four periods.
- A status date (completed or announced).

For reports based *by industry*, a breakdown of equity (common and preferred), income fund and debt issuances for each applicable industry will be generated. The number of tranches and total proceeds relating to each industry will be shown (as well as total figures for each industry and overall). To view the component tranches in any industry/security group, click on the corresponding '# of tranches' cell wished to be viewed. From there, click on an issue name to view its details.

For reports based on *equity activity*, the following will be shown upon choosing either of the following options:

Year-to-Date

- All new issues for the year-to-date period for all years going back to 1993.
- Breakdown of activity for the current year-to-date period in comparison to the previous year based on five different ranges of proceeds.
- Top financings that apply (based on the status date chosen) within the period chosen.

Quarterly

- All new issues for the quarterly period; up to the last 12 quarters will be shown.
- Breakdown of activity for quarterly period chosen in comparison to the previous quarter based on five different ranges of proceeds.
- Top financials that apply (based on the status date chosen) within the quarterly chosen.

To view the corresponding issuances in any of the yearly or quarterly periods, click on the '# of tranches' cell in the comparison or breakdown of activity tables.

Under the top financings table, click on the issuer to view the details of the financing.

FP Fixed Income

Search for debt/preferred public offerings and private placements of Canadian companies, with data dating back to 1993. Information is exportable into Microsoft[®] Excel.

Basic Search

Search based on the issuer name and/or symbol, with the option of choosing to search for those offerings/placements based on debt, preferred, or both (default). Click on the issue name (also shown is its interest rate and maturity date) to see the details. Each record will consist of the amount of debt issued or the number shares issued at its issuance price, as well as the interest rate terms and maturity.

Advanced Search

Search must be conducted based on either debt or preferred. Additional filters available include:

- Terms of issue (public offering or private placement).
- Market (Canada, U.S., and various others).
- Currency.
- Incorporation (Canadian, federally and/or provincially, as well as foreign).
- SIC Code (only one selection allowed).
- GICS (multiple selections allowed).
- NAICS Code (only one selection allowed).
- Amount issue (choose range).
- Debt maturity (only applicable to debt issuances).
- DBRS Rating.

- Coupon feature and percentage (min and max options).

Click on the issue name of the issuer wished to be viewed to see details.

FP Directory of Directors

The Directory of Directors (DoD) contains information of directors and executives of Canadian public and private companies, listing the following (if available): directorships and officers held both past and present; primary business address; contact information; education; and associations. Information is exportable into Microsoft[®] Excel.

The general criteria for company inclusion in the DoD are as follows:

Public Companies

- Canadian incorporated;
- Contain a minimum of three (3) directors, of which the majority must reside in Canada; and
- Total assets or gross revenue of a minimum of Cdn\$25,000,000 annually.

Notes:

There are rare instances where a company will only have officers (no directors) as they are the subsidiary of another publicly traded company.

There are some companies included that no longer meet the Cdn\$25,000,000 threshold as they did at the time of original inclusion.

Private Companies

- Minimum of three (3) senior executives (if possible);
- Canadian headquartered;
- Involved in forward-looking industries, provide innovative/viable products and/or services, or represent a niche market; and
- Recently updated website.

Basic Search

Search based on a person and/or company name.

Searches exclusively by person name will list their lead or current company and position at that company.

Searches exclusively by company name can be chosen to be shown by the following:

- Lead company – all persons whose lead (primary) company is currently that of the one searched.
- Current company(s) – all persons who are currently a director and/or officer of that company.
- Previous company(s) – all persons who were previously a director and/or officer of that company.
- All – all persons who fall within all of the above categories.

Click on a person to view their profile.

Clicking on a company (one that is highlighted) within a person's coverage under positions or previous positions will take you to that company's [Corporate Survey](#).

Advanced Search

Search persons based on a variety of options including: position(s), company type, industry, SIC Code(s), GICS, NAICS Code(s) and education.

Follow the same process as described in Basic Search to view a person's profile and any companies within.

Connectors for Person

Enter the name you would like to search. Click on the person you would like to view. Results will show:

- The company/companies of which the individual is a board member, as well as a sub-list of each of those company's/companies' other board members.
- The number in brackets beside each of those other board members represents the number of boards on which that person sits. Clicking on that person will take you to their profile.
- Persons bolded in green indicates those that sit on common boards with the person searched.

Person Search

Searches contact information of individuals in multiple corporate databases at one time.

Select from the list of databases, consisting of [FP Corporate Surveys](#) and [FP DoD](#), as well those described in [Additional Databases](#) (excluding Equifax Commercial Law Record and Industry Canada - Canadian Corporate Names).

Click on any of the links to view the coverage under the corresponding database as described within.

Global Search

Offers the ability to search multiple corporate databases at one time based on a word or phrase.

Select from the list of databases, consisting of the aforementioned FP sections (excluding Snapshots and Industry Reports) as well as all those described in Additional Databases. Searches will provide the following:

The full-text record of:

- [FP Corporate Surveys](#)
- [FP New Issues](#)
- [Equifax Commercial Law Record](#)
- [Industry Canada - Canadian Corporate Names](#)
- [Industry Canada - Canadian Federal Corporations and Directors](#)
- [Owen Media Partners – Canadian Trade Index](#)
- [Owen Media Partners – ProFile Canada](#)
- [Cengage Learning Gale – Encyclopedia of Associations](#)
- [Cengage Learning Gale – Ward’s Business Directory](#)

Former and current company names in:

- [FP Corporate Analyzer](#)
- [FP Investor Reports](#)
- [FP Historical Reports](#)
- [FP Predecessor & Defunct](#)
- [FP Dividends](#)
- [FP Fixed Income](#)
- [FP DoD](#)

The vendor, acquiror and target names in:

- [FP Mergers & Acquisitions](#)

Additional Databases

Equifax Commercial Law Record

Provides public information on commercial legal suits and judgements from courts across Canada. Information is exportable into Microsoft® Excel.

To search, enter a company name and choose whether it be as plaintiffs, defendants, or both (default). Searches may be conducted based on record type and the defendant's city or provincial residence.

Each report includes the plaintiff's name; defendant's name, city and province; the record type (legal, bankruptcy and miscellaneous such as mortgages, debentures and incorporations); the type of action and the date it was filed; the reason for the suit; the amount involved (if available); and the court and its location. A report also generally contains the court file number allowing for the obtainment of copies of the complete writs from the courthouses.

Industry Canada – Canadian Corporate Names

Provides summary information relating to federally incorporated companies included in the Canadian Federal Corporations and Directors database.

Enter a company name and select. Obtained will be information providing the jurisdiction in which the company has been registered, the company's status, incorporation date and governing legislation.

Industry Canada – Canadian Federal Corporations and Directors

Provides information on federally incorporated companies, including registered office address, incorporation date, governing legislation, previous company name(s), company status, as well as the range for the number of directors that may sit on the board.

To search based on company, enter a name and select. Searches may also be conducted by company address.

Any inactive companies due to amalgamation will allow you to click on the successor company's name to view that profile. Similarly, any active companies formed by amalgamation will allow you to click on the predecessor company's name to view that profile.

Owen Media Partners – Canadian Trade Index

Contains marketing and business intelligence on Canadian manufacturers, including annual sales, employees, products and product categories, trademark(s) (if applicable) and export region(s). Each record includes up to 21 functional contacts.

Search based on company and/or person name. Searches may also be refined based on location, SIC Code, employees, trademark and export region.

Searches will provide company name and where they are headquartered. Click on the company you wish to view.

Owen Media Partners – ProFile Canada

Contains marketing and business intelligence primarily of private Canadian companies. Each record includes up to 21 functional contacts.

Conduct searches and contains information similar to that found in Canadian Trade Index, excluding trademark(s) and export region(s).

Searches will provide company name and where they are headquartered. Click on the company you wish to view.

Cengage Learning Gale – Encyclopedia of Associations

Provides profiles of Canadian associations, including addresses and descriptions of professional societies, trade associations, labour unions, cultural and religious organizations, fan clubs and other groups.

Search based on organization name/acronym and/or person name and position title. Searches may also be refined based on location, organization type, SIC Code, members, and employees.

Searches will provide company name and where they are headquartered. Click on the company you wish to view.

Cengage Learning Gale – Ward's Business Directory

Provides profiles containing current company information primarily on private Canadian companies.

Search based on company name and/or person name and position title. Searches may also be refined by location, SIC or NAICS Code, sales volume and employees.

Searches will provide company name and where they are headquartered. Click on the company you wish to view. Information contained will include the company's contact name/title, as well as historical sales by year.

Lead List Generator

Organizes and targets direct mail campaigns, prospecting, and managing sales territories. Information is exportable into Microsoft® Excel.

The databases in which searches can be conducted on are listed below. The search pages are exactly as found under their respective sections, except as follows:

[FP Corporate Surveys](#) – excludes financial search option (Advanced Search screen).

[FP DoD](#) – excludes department/functional heads, industry, SIC Codes, GICS and NAICS Codes options (Advanced Search screen).

[Owen Media Partners](#) (both) – excludes company/person name options.

[Cengage Learning Gale](#) (both) – excludes organization/person name options.

Results for all databases (except DoD), will return the company name (click on the company's name to view their profile related to the corresponding search section), address, phone and/or fax number (if available), and contact email address (if available).

Results for DoD will show the person (click on their name to go to their DoD profile) and their lead company's head office address, phone and/or fax number (if available), and the company's/person's email address (if available).