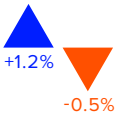


# For Wealth Advisors

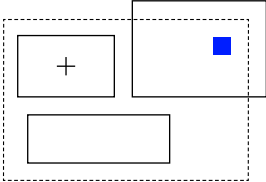
#03

IBM  
AMZN  
XAU

W O R K S P A C E



## Screeners App





## 1. Why should I use the app?

The **Screener App** in LSEG Workspace for Wealth Advisors 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

| Unsaved Screen   | Unsaved Template                       | Add Column               | Group                               | Add Rank                          |  |  |  |  |
|------------------|--|--------------------------|-------------------------------------|-----------------------------------|--|--|--|--|
| Identifier (RIC) | Company Name                           | Company Market Cap (USD) | Analyst Revisions Model Region Rank | Price Momentum Mid Term Component | Earnings Per Share - SmartEstimate® (FY1, USD) | Revenue - SmartEstimate Growth (Ne...) |  |  |
| NFLX.OQ          | Netflix Inc                            | 198,369,211,946.40       | 96                                  | NA                                | 6.44   | 18.2%                                  |  |  |
| 002594.SZ        | Byd Co Ltd                             | 20,457,156,224.88        | 100                                 | 43                                | 0.13   | 14.7%                                  |  |  |
| VIPS.N           | Vipshop Holdings Ltd                   | 10,691,476,569.00        | 97                                  | 76                                | 1.21   | 15.3%                                  |  |  |
| 601390.SS        | China Railway Group Ltd                | 18,275,356,647.55        | 98                                  | 50                                | 0.14   | 10.9%                                  |  |  |
| 3808.HK          | Sinotruk Hong Kong Ltd                 | 6,633,081,216.98         | 83                                  | 95                                | 0.21   | 3.1%                                   |  |  |
| FNVT.O           | Franco-Nevada Corp                     | 28,261,445,200.86        | 73                                  | 96                                | 2.22   | 11.5%                                  |  |  |
| 600809.SS        | Shanxi Xinghuacun Fen Wine Factory ... | 14,747,712,035.68        | 78                                  | 94                                | 0.40   | 17.8%                                  |  |  |
| 3626.T           | TIS Inc                                | 5,549,595,004.51         | 73                                  | 82                                | 1.18   | 3.5%                                   |  |  |
| 8697.T           | Japan Exchange Group Inc               | 11,207,195,003.71        | 71                                  | 79                                | 0.80   | 2.8%                                   |  |  |
| TMUS.OQ          | T-Mobile US Inc                        | 121,846,279,916.80       | 83                                  | 79                                | 1.98   | 15.5%                                  |  |  |
| 300628.SZ        | Yealink Network Technology Co Ltd      | 7,623,712,279.52         | 71                                  | 53                                | 0.36   | 30.4%                                  |  |  |
| 3283.T           | Nippon Prologis REIT Inc               | 7,064,586,970.65         | 94                                  | 68                                | 75.56  | -10.7%                                 |  |  |
| ZM.OQ            | Zoom Video Communications Inc          | 48,969,899,764.24        | 87                                  | NA                                | 0.44   | 34.9%                                  |  |  |
| 8572.T           | Acom Co Ltd                            | 6,166,917,206.54         | 78                                  | 43                                | 0.44   | 2.9%                                   |  |  |
| WPM.TO           | Wheaton Precious Metals Corp           | 20,924,012,051.90        | 72                                  | 99                                | 0.88   | 8.8%                                   |  |  |
| 600900.SS        | China Yangtze Power Co Ltd             | 52,814,877,430.26        | 88                                  | 44                                | 0.14   | 4.8%                                   |  |  |

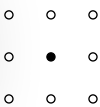
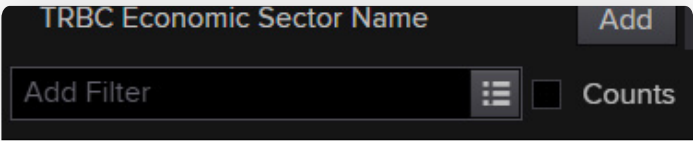
## 2. Key facts

- Select your preferred universe on which to screen.
- 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: Identify 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.

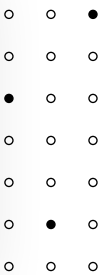
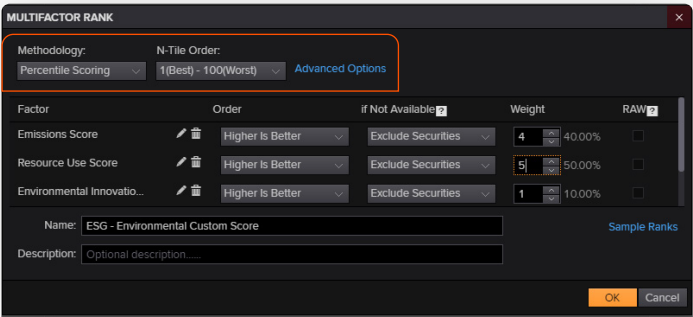


3. Top tips on how to use the app

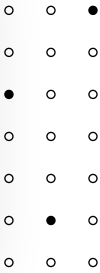
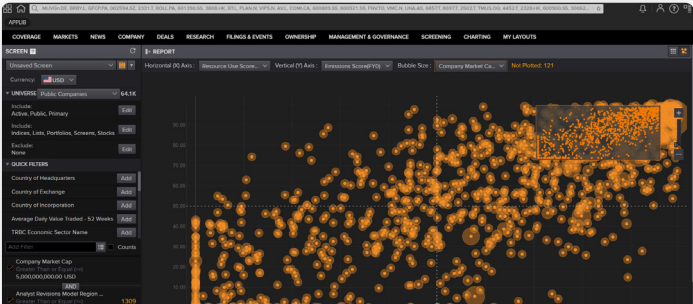
- To access Screener, click on **Search Tools** and select **Screener** from the **auto-suggest** options.
- Select a screen universe: public companies, private companies, an index, a portfolio or a watch list.
- Three ways to add filters:
  - **Quick Filters** let you select the most popular filters with a mouse click
  - Type a keyword in the filter **Search box** and select an entry from auto-suggest
  - **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 users if required.
- Create customized reports to sort and rank securities, including multifactor ranks:



- You can rank on single factors as well as a combination of factors (=multifactor rank). To create a multifactor rank, click **Add Rank** “this is shown in the screenshot on page 2”, then **New Multifactor Rank**. Use the field picker to select the factors you want to combine. In this example, three factors have been combined, each with a custom weighting: **Emissions Score 40%**, **Resource Use Score 50%** and **Environmental Innovation Score 10%**.
- Use the Scatter Chart to visualize the results:





## 4. Need help?

You can contact us directly through your access to Workspace for Wealth Advisors.  
Click on the question mark icon top right and submit your question via Get Support.



Access our blended learning on the training site [here](#)  
Visit [the Workspace for Wealth Advisors page](#)

