Screening Companies and Securities
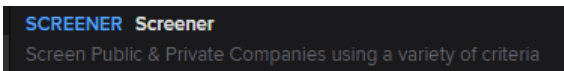
Use the **Screen search template** to filter companies and securities across Eikon's universe.

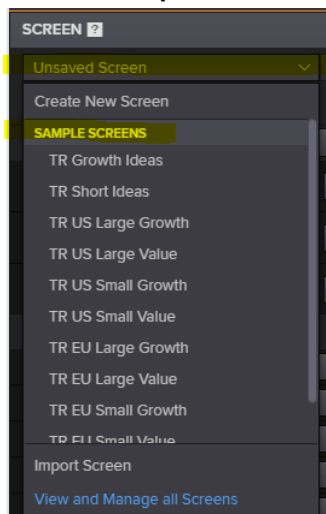Type **screener** in the search box in the upper left corner

Click on **SCREENER**

Start from scratch or use one of Eikon's prebuilt samples

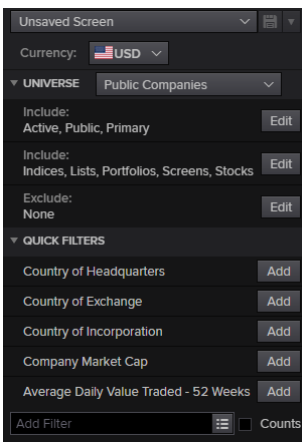**Unsaved Screen** – Start from scratch and create your own custom spreadsheet

Prebuilt Samples – Click **Unsaved Screen>Sample Screens**

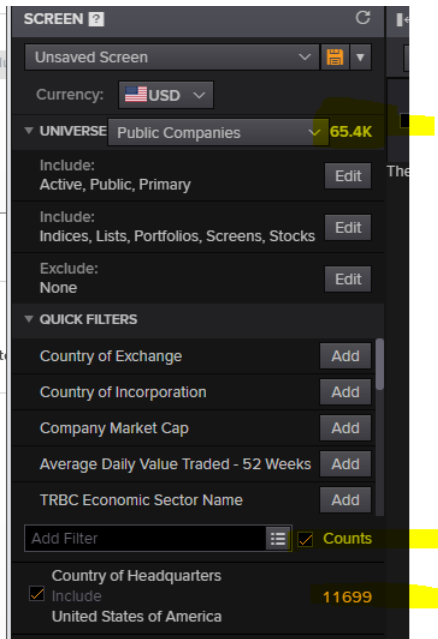**Universe** – start here and define the universe you want to search:

Public Companies; Private Companies; Public and Private Companies; Private Equity; Deals, Funds, Ownership Holdings, Ownership Investors, Ownership Contacts

Defaults to include Active Public Companies; you can also include inactive companies
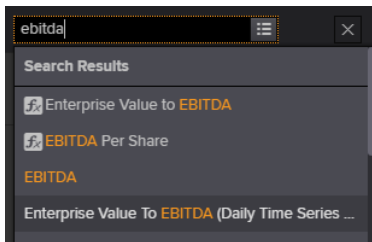
Number to right of Universe box - total number of securities in that universe
Check **Counts** box at the bottom to display running count of total number of companies after each filter is applied
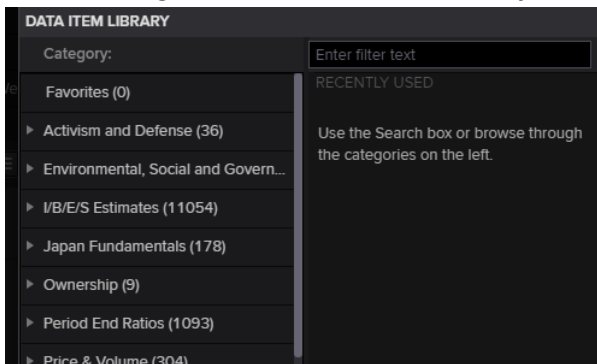

Quick Filters – Most popular data items; click **Add** for filters you want to use
Add Filter search box – type any additional filters you want to add. For example: ebitda
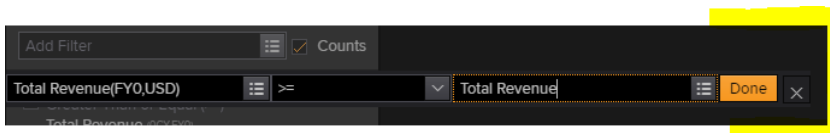

OR click on the **Bars** to the right of the **Add Filter** search box to search the **Data Item Library**
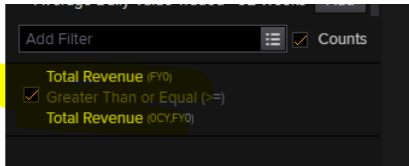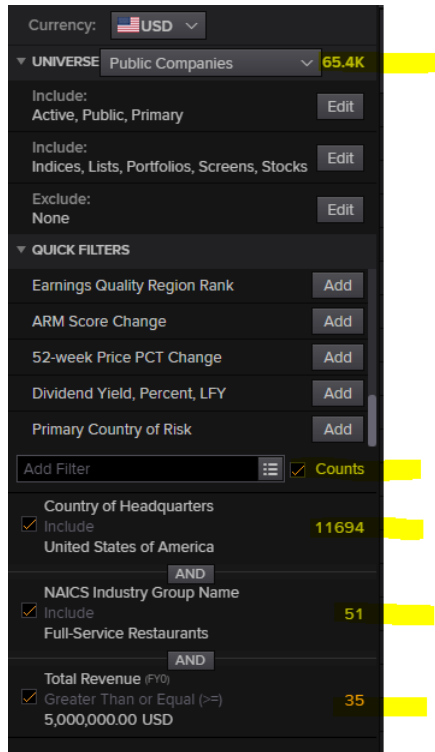Click **OK** in right corner of **Data Item Library** when done

At the screening template, click **Done** to the far right of added data item to add to your filters

To delete or edit any data items, hover your mouse over the item and edit/delete options will appear to the right

By checking the **Counts** box, a running count of total number of companies after each filter is applied
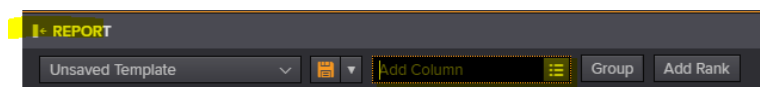

Refreshing your screen - Screens should automatically refresh each time you add, remove or change a filter

Manually refresh your screen anytime by clicking the refresh icon
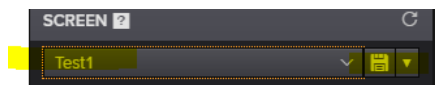

Creating a Report Template

You can customize the data items you want to display in your report

Use the **Report** ribbon at the top of the page to **Add Columns**, **Group** and **Rank** companies, **name** and **save** templates, and more.

Saving Your Screens

Click on the **Save** icon to name and save your search

Exporting Results in Excel

Click on the **Excel** icon on the top, far right of the screen
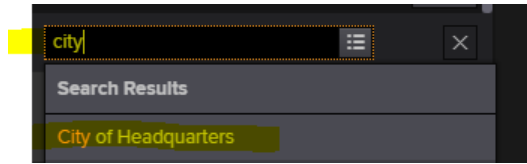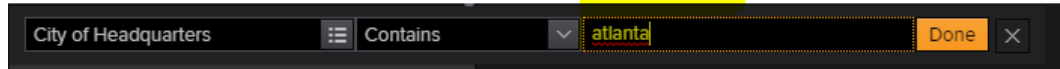
Additional Search Tips

Screen on Headquarters City
The default company headquarters is country.
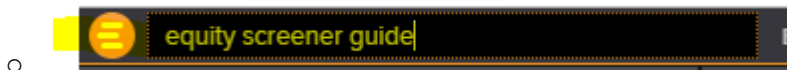Type city in the **Add filter** search box and click **City of Headquarters**

Type your city in the box and click **Done**

Use **Eikon's Equity Screener Guide** to learn more about screening

- Search for the guide within Eikon

  ○
- Click on the **Equity Screener Guide PDF** in the **Search Tips** section of the GBL Thomson Reuters Eikon database page