Orbis CEO & Board: Get started with financial data (EDSC)

The UL offers several financial databases that provide CEO & Board data:

- **Execucomp**: part of WRDS, Regions: US, companies covered 3500, Years of coverage: 1992-present.
- **ISS**: part of WRDS, Regions: US, companies covered 1500, Years of coverage: 1996-present.
- **People Intelligence**: part of WRDS, Global coverage including both public and private companies, Years of coverage: 1998-present.
- **Orbis**: CEO & Board data only current, Global coverage
- **BoardEx**: Regions: Global coverage, companies covered 20,000, Years of coverage: 1999-present.

This manual will focus on the Orbis database.

**Information on Orbis:**
Orbis is provided by Bureau van Dijk and contains data from the last 10 years of 79 million public and private companies worldwide. Bureau van Dijk collects this data from local sources, for example: data of Dutch companies is taken from the Chamber of Commerce. This annual report data is processed by Bureau van Dijk, so that companies of different countries can be compared (this is called the Global Format).

You find the link to Orbis in the list of financial databases. To get access to Orbis from home, you need a VPN-connection or use EZ proxy. Our licence is limited to 8 simultaneous users.

See for off-campus access: https://service.ubib.eur.nl/training_support/#/course/432?_k=nf5arx

**Available identifiers**: BVD ID number (BVD products only), Ticker symbol, ISIN number, and (Inte)National & IP identification numbers.

**Settings**: Under Settings in the upper right corner you can adjust several settings for Directors/Managers/Contacts. You can choose for example: "Use Information from all information providers..." or "Ignore information from informal sources".

**Support**
Under Help in the upper right corner you can find the User Guide. In that guide you can find the definitions of the data items under Data Details > Directors/contacts. The Quick Tour is useful to get to know Orbis.
Getting your data

CEO & Board data in Orbis is only current data. To get your CEO & Board data you need to go through three steps. A similar approach can be used to get data on ownership and financials (annual report data).

In the first step you need to create your search query. This means that you apply filters to all companies in Orbis by setting criteria. For example you might be interested in companies in a specific country or of a particular size. Another possibility is that you already have companies from another database (for example you have all acquirers from deals you collected in Zephyr). Both approaches will be discussed.

In the second step you can create your report that means you can get information on the selected companies and individuals, such as full name CEO, Salary, Degree, Board member etc.

In the final step you can export your data.

**Step 1: Setting the criteria**
In this first step we are going to set the criteria to create a list of companies.

**An example**: We want to make a list of public, active European companies in the manufacturing sector.

To limit to European companies, you choose Location > World region/Country/Region in country. In the following screen select the regions of interest by clicking on the check-box.

You can also select the separate countries. Now click on OK.

Orbis automatically excludes inactive companies from the search strategy. However it includes companies with “unknown situations”. To exclude companies with unknown situations or to include inactive companies you can go to Status. Do note that these statuses are based on the most recent information.
Next we want to add a search criterion to keep only those firms that are active in manufacturing. Go to Industry > Industry classifications. Under Industry Classifications you can select industries based on the NACE Rev 2., NAICS 2017, or US SIC, NACE Rev 2. main sections, and BvD major sectors classification systems. In this case we use NACE Rev 2. and we select codes 10 to 32. The choice of classification systems does not matter too much, although the codes differ by system. Furthermore NACE rev2. main sections and BvD major sectors are defined quite broadly.

Finally to select public companies you have to click Stock data > Listed/unlisted companies. Here you can mark Publicly listed companies.

Now click on View list of Results.

Tip: With the search criterion ‘Identification Numbers’ you can upload lists with identifiers. You can copy a lists of these codes from Excel and paste them. The codes must be separated by a comma or start on a new line. Another way is to upload the list directly via ‘load from disk’. Allowed formats are .list, .xlsx(s), and .txt

Step 2: Requesting data
In this step we are going to select the data/variables that we want to collect from the companies/Individuals. Orbis always provides a default list of items. However in most cases you will want to add (or delete) some variables. To adjust this list click on Columns. In this screen you can choose your variables of interest by clicking on the check-boxes. You can search for your variables by exploring the (sub)folders or by using the search box.
When you click on ‘modify’ behind a variable a pop-up appear. In the pop-up for the variable “Full name” for example you can choose for “Only members” and select CEO or CFO. In this case you will get only information on the CFO and CFO of the selected company.

Tip: If you want to add information about public companies from other databases: add as many identifiers as possible to your list, like ISIN Number, SEDOL Number and Ticker Symbol. You find these identifiers under Identification numbers.
Step 3: Exporting your list

To export your data click on [Export].

Choose your format and name for your file. Finally click on ‘OK’.
Sometimes you will get a notification that your export cannot be immediately processed, but you can get a notification by e-mail. Provide your e-mail address and Zephyr will send you the file.

**Note**: When exporting your reports you can encounter a limitation set by Orbis. The only way to work around this issue is by splitting your report into several parts. For example you can choose to download the companies by country or you can decide to split your variables over multiple downloads.

**Tip**: If you are going to work with STATA you can add field codes, which can be used as variable names. Go to Settings > Lists > Settings and click on the check box to show field codes.

### Saving and Uploading

In Orbis you can save your search strategy to your drive. Click on the save button above the search strategy then in the pop-up menu enter a name for your strategy and click on the save button to the left. This will allow you to download the search strategy to your drive. To load your search strategy go to 'Saved searches' and click on 'Load from disk'.

Similar to saving your search query you can save your selected variables in a so-called list file. In the screen where you select your variables you can name your list in the bottom right box. To the left of it you can again download your list to your drive. To upload a previous created list you must click on 'Load from disk' on the left-hand side of the screen.

Saving and uploading previously created files is especially useful when you have to redo earlier work or when you want to do separate downloads for each country but with the same variables.

### Reports in Orbis

From the results list you can click the name of a company to get more information about that company. This information is put into reports, like Contact Information, Industry/Activities (with the SIC-codes), Key Financials, Current boards & management and Current subsidiaries.

At the right side of the screen you can open other reports, like Financial Data > Cash Flow Statement or Ownership Data > Current Shareholders. These are always standard reports: in most cases you can't adjust them. You can make your own reports under Via Report Format > New Format, but you can just select a 'block' with data (for example just ratio's, you can't select specific ratio's). For financial ratio's it might be easier to add the requested items to the list of companies (see chapter: Making a list of companies).

You can download a report: Click the button **Export** at the top of the page in the blue bar. If you export reports of multiple companies, then each company will get its own sheet in the Excel-file, at the top of the page in the blue bar. You can export up to 50 reports in one download.