Case study

Research on the Terminal

As big banks loan losses balloon, use KPIC, MODL, Document Search and Notebook to stay on top of the latest research and analysis.

Bloomberg
Buy-Side Solutions

Overview

Bloomberg's robust research tools allow you to get the document intelligence you want quickly, access both estimated and actual company financial data, and bring all your findings into one Research and Analytics Platform.

Bloomberg's company financials solution **MODL <GO>** lets you analyze company performance like never before. The new **KPIC <GO>** explains how company performance stacks up versus industry trends. The AI-powered Analytics Platform **DS <GO>** unlocks qualitative analytics. Together, these tools enable unmatched company research.

Figure 1 – Run JPM US Equity MODL <MODL> to analyze JP Morgan's earning performance.

MODL shows that JP Morgan's loan loss provision in Q4 was $2.29 billion, 12% higher than brokers expected.

Company Financials: MODL <GO>

- The Full Picture: View deep, industry-specific actuals and estimates.
- React Quickly: Compare in real time company-reported data versus broker estimates within minutes of a company's earnings release to analyze where they beat or missed expectations.

Figure 2 – Run KPIC <GO> to compare JP Morgan's loan loss provision against peers like Bank of America, Wells Fargo, Citigroup and more.

JP Morgan and other big banks see loan loss provisions continuing to increase as we approach a potential recession.

KPI Comparison: KPIC <GO>

- Putting key data in context: Analyze how a company stacks up against industry peers on the most relevant metrics.
- Visualize industry trends: Leverage company-reported and broker forecast data to understand industry inflection points.

Figure 3 – Run DS <GO> and change sources to transcripts. Search for Loan Loss Provisions and select the AI-suggested topic from the autocomplete. Notice the increase in mentions across Q1 for BISPRBAC Index, which tracks BI North America Large Regional Banking Competitive Peers.

From there, clicking through to the "More Trends" overview screen further contextualizes the increase in Loan Loss Provisions. See how the street is discussing better than expected Loan Growth numbers in the anticipation of a shallow recession in 2023 by clicking through to the Economic Slowdown topic.
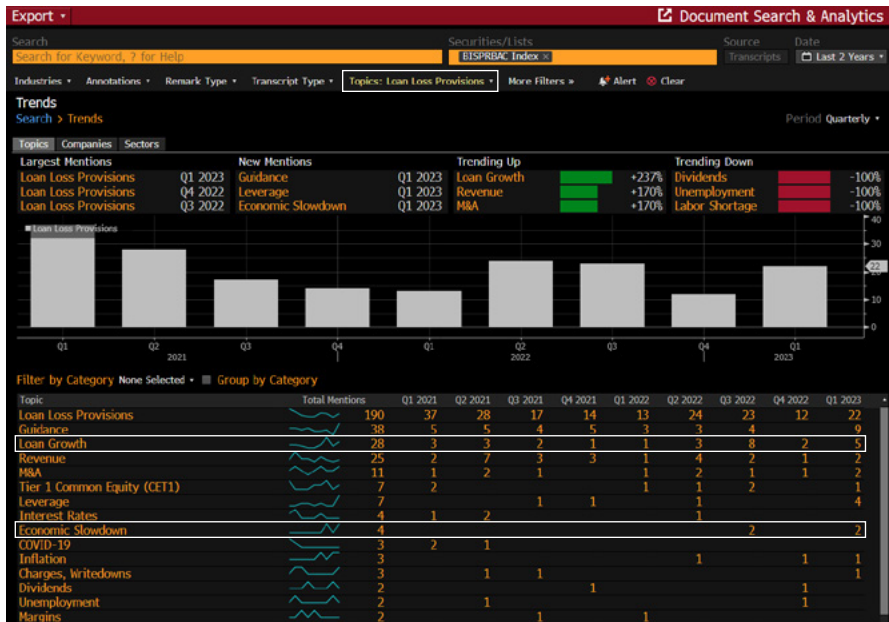
Document Search: DS <GO>

- Comprehensive Content: Search 200 million documents, including research, filings, industry news, transcripts and legal & regulatory.

- Efficient AI Search: Quickly spot shifts in company discussions with AI Topic overviews and search synonyms compiled using Natural Language Processing.

- Integrated Notebook: Manage your findings in a single repository of notes and annotations.

Click the Document Search icon for 'Provision for Loan Losses' in KPIC <GO> to see increased discussions across company transcripts.

- Track discussion inflection points: See the most talked about topic across any industry, security or portfolio.

- Link companies to emerging trends: See the companies talking most about any topic.

- Sector shifts: Track changes in discussion at an industry level.

Figure 4 – Run DS <GO> and change sources to transcripts and research. Search for Loan Loss Provisions and select the AI-suggested topic from the autocomplete. Click more trends.

With all these research findings, it's time to drop the most important findings into an investment thesis with our research management tools.

RMS

- Highlighting and clipping tools allow you to capture critical findings.

- Collaborate with the whole team, using the integrated Notebook in Document Search.

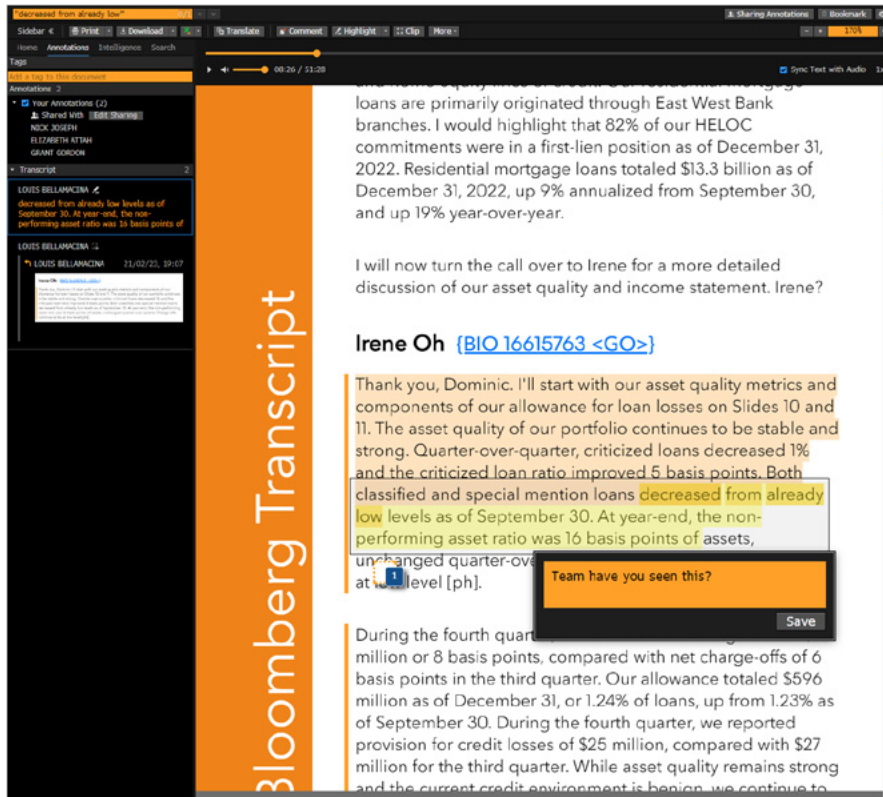- Drop findings into Bloomberg Notes or share through IB Chat Forums.

Figure 5 – Run DS <GO> and open any document. Highlight text to activate the annotation menu.

All your findings are brought together through Document Searches integrated in Notebook, allowing you to access internal notes, annotations and related IB Forum discussions.
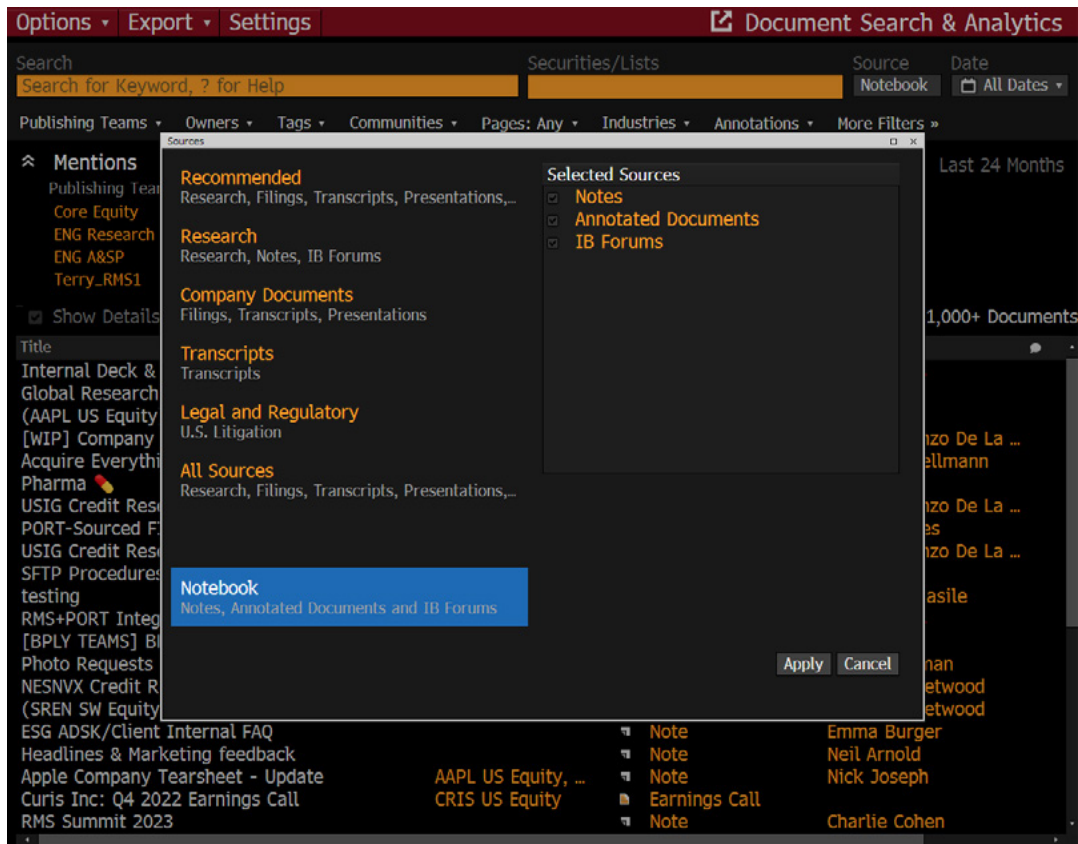
Figure 6 – Run DS and change the source to Notebook (shortcode: DS NOTE <GO>).

Take the next step.

For additional information,
press the <HELP> key twice
on the Bloomberg Terminal®.

bloomberg.com/professional

Beijing
+86 10 6649 7500

Dubai
+971 4 364 1000

Frankfurt
+49 69 9204 1210

Hong Kong
+852 2977 6000

London
+44 20 7330 7500

Mumbai
+91 22 6120 3600

New York
+1 212 318 2000

San Francisco
+1 415 912 2960

São Paulo
+55 11 2395 9000

Singapore
+65 6212 1000

Sydney
+61 2 9777 8600

Tokyo
+81 3 4565 8900