UCONN
SCHOOL OF BUSINESS

Bloomberg

Getting Started on Bloomberg:

Basic Navigation & Key Functions

Navigation

The Bloomberg Keyboard

Red = Stop Keys
Green = Action Keys
Yellow = Market Sector Keys

<u>Helpful Keys</u>

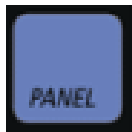|			
Esc CANCEL	Exits the current function and cancels the current activity on the screen	**HELP**	Connects to function Help Pages (online user guides) as well as the Bloomberg Helpdesk
Enter GO	Executes a typed command. Also known as the <GO> key	**SEARCH**	Enables a keyword search of the entire Bloomberg database
END MENU	Navigates from any function back to a menu of related functions, then back through the menu hierarchy to the Home menu Closes pop-ups	**F8 EQUITY**	Yellow market sector keys enable you to: ➢ Load securities: I.e. IBM US <EQUITY> <GO> ➢ Access market sector menus: I.e. <CORP> <GO>

Bloomberg Terminal

<u>Panels</u>

When using Bloomberg, there are four panels or independent work stations that allow you to multi-task within the system. These panels are essentially just other open Bloomberg screens which you can switch back-and-forth between very easily by hitting the purple "Panel" button on the keyboard (similar to switching between all running windows using the Alt+Tab function, but this is exclusively for open Bloomberg windows).

<u>Bloomberg Screen</u>
A. Toolbar
B. Command Line
C. Function Area
D. Information Panel

B. Toolbar
C. Command Line
D. Function Area
A. Information Panel

A. Toolbar

The toolbar helps keep a history of the user's recent activity on Bloomberg for easier navigation back-and-forth between screens and within menus, while also providing shortcuts to perform key tasks, customize settings, and access help. The two arrows in the upper left hand corner allow the user to go back and forward between the different functions entered in the command line. The left side of the toolbar includes a menu tab and drop-down list of recently loaded securities, while showing the current loaded security. To the right of the toolbar, a user can click the "Message" section for a shortcut to his or her mailbox. The star icon enables the user to create "favorites," code key buttons, and keep a list of functions and securities. The other buttons allow the user to export data, save the screen as an image, upload files, add notes, adjust screen size, access help, and exit the Bloomberg terminal, along with much more.

B. Command Line

This is the go to area for navigating and searching throughout the Bloomberg terminal. Here, you enter commands for functions and securities in their mnemonic code, i.e. – "N<GO>" will bring up the News screen. Even if you are not sure what the security's ticker is or what the mnemonic code may be, just simply start typing keywords, and the autocomplete feature makes the Bloomberg Terminal entirely discoverable by coming up with a whole list of suggestive searches.

C. Function Area

This is where you will find the actual function content displayed of your search.
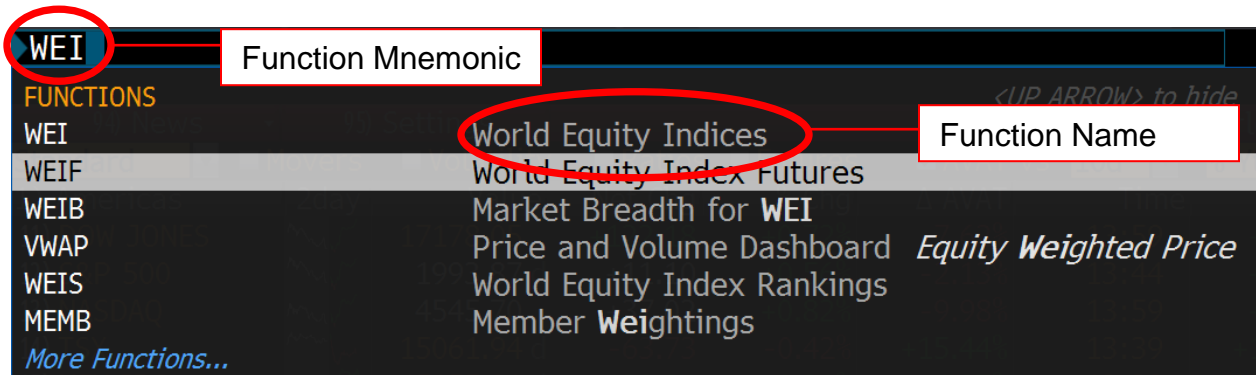
D. Information Panel

This is a banner that runs along the bottom of the screen which will usually show highlights or enhanced Bloomberg features, but not always, related to the function that is currently running.

Functions & Securities

<u>Running Functions</u>

What are functions?
Functions are unique Bloomberg applications that provide analysis and information on securities, sectors, regions, and much more. A function is accessed by typing in its unique mnemonic (a short, memorable name or code) and then pressing the <GO> key. I.e. – WEI is the mnemonic code for the "World Index Indices" analysis function. To access this screen, enter WEI<GO>

Two Types of Functions

1. <u>Non-security specific:</u>
    These functions provide information and analysis on an entire market sector and do not require a loaded security
    I.e. – WEI is a non-security specific function since it provides information for many equity indices; you can run WEI without loading a security.
2. <u>Security-specific:</u>
    These functions require a specific security to be loaded into Bloomberg first (meaning, a security must be entered into the command line, i.e. – IBM US<Equity>) and run specific security analysis on the loaded security.
    I.e. – In order to use the GP function (Graph Price), Bloomberg needs to first know what security to graph a price of, thus a security needs to be entered beforehand: IBM US <Equity>GP<GO>

    Note: The loaded security remains the active security on the panel until you load a different security.