REFINITIV EIKON

QUICK START GUIDE

Eikon 4.0

REFINITIV®

DATA IS JUST
THE BEGINNING®

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Installing and signing in

Installing the application

Pre-requisites for Refinitiv Eikon

1. Go to https://customers.refinitiv.com/Eikon.
2. Click **Check My Computer**.
3. Follow the on-screen instructions to run System Test.

Getting your Refinitiv Eikon account

1. Your company's Market Data team or Refinitiv Account Manager requests a Refinitiv Eikon ID on your behalf.
2. You receive a Welcome email from Refinitiv Eikon.
3. Click the link in the Welcome email to activate your account.

Installing Refinitiv Eikon

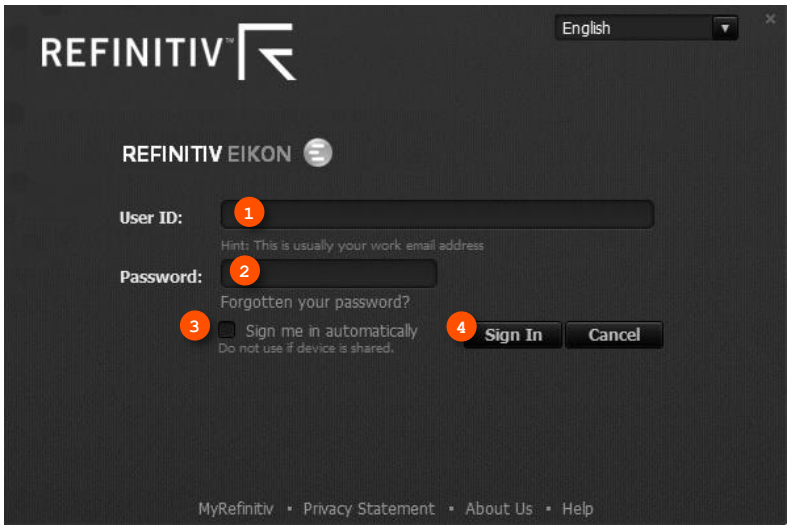
After checking that your computer meets the requirements and activating your account, you are ready to install Refinitiv Eikon:

1. Go to https://customers.refinitiv.com/Eikon/
2. Click **Sign in & Download**.
3. Follow the on-screen instructions to install Refinitiv Eikon.

Signing in

On your desktop

1. Point to **Start > Programs > Refinitiv** and choose **Refinitiv Eikon**.
2. Type your user ID ❶ and password ❷.



3. Select **Sign me in automatically** ❸ to avoid signing in the next time you start the application.
4. Click **Sign In**. ❹

On your mobile device

The single sign-on (SSO) feature with single exchange fees lets you access Refinitiv Eikon on iOS, Android, and BlackBerry devices.

ⓘ For eLearning, go to https://training.refinitiv.com/eikon/mobile-solutions

On the web

You can now access key Refinitiv Eikon news and data on the web, without having to download an application. Just go to http://eikon.refintiv.com/login and use your user ID and password.

ⓘ For eLearning, go to http://training.refinitiv.com/video/v.php?v=1378

Contact Support

If you cannot sign in

Unable to sign in? The most likely cause is an incorrect password or no Internet connection.

After logging in, you can always access help by pressing **F1** or using the right-click menu.

Should none of these solutions work, contact Refinitiv:

1. Click the **Contact Us** link in the **Sign In** dialog box.
2. Fill in the **Contact Us** page that appears, and click **Submit**.

Getting support after signing in

If you encounter problems when working with Refinitiv Eikon or receive error messages and would like more information, you can contact Support.

Go to > Help > Contact Us.

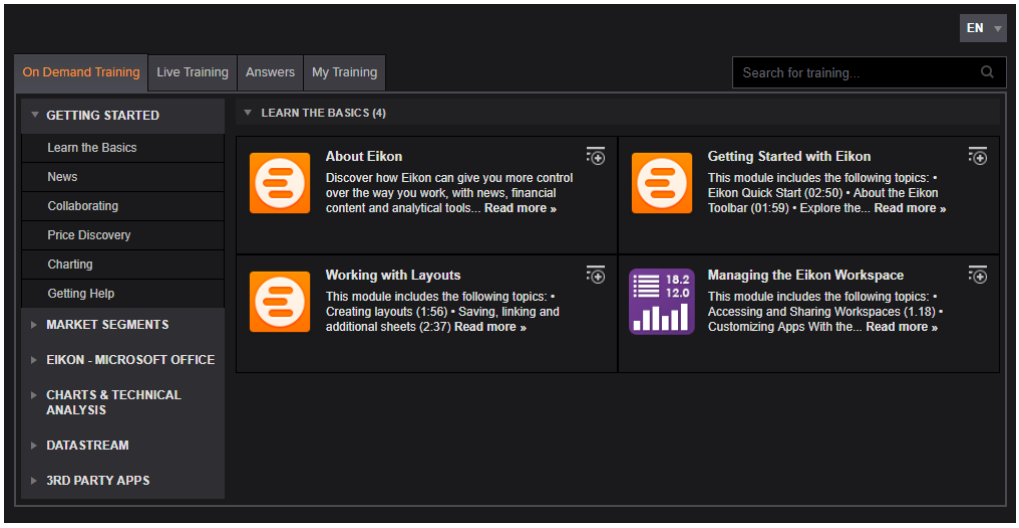
Getting more help

- Click NEW in the top right of your toolbar to find out what's new in Refinitiv Eikon.
- Go to > Help for all help-related options.
- MyRefinitiv is the single online entry point to Refinitiv service and support. You can find numerous documents, including the latest version of this guide.

Getting training

Type **TRAINING** into the **Search** box to open the Training App:

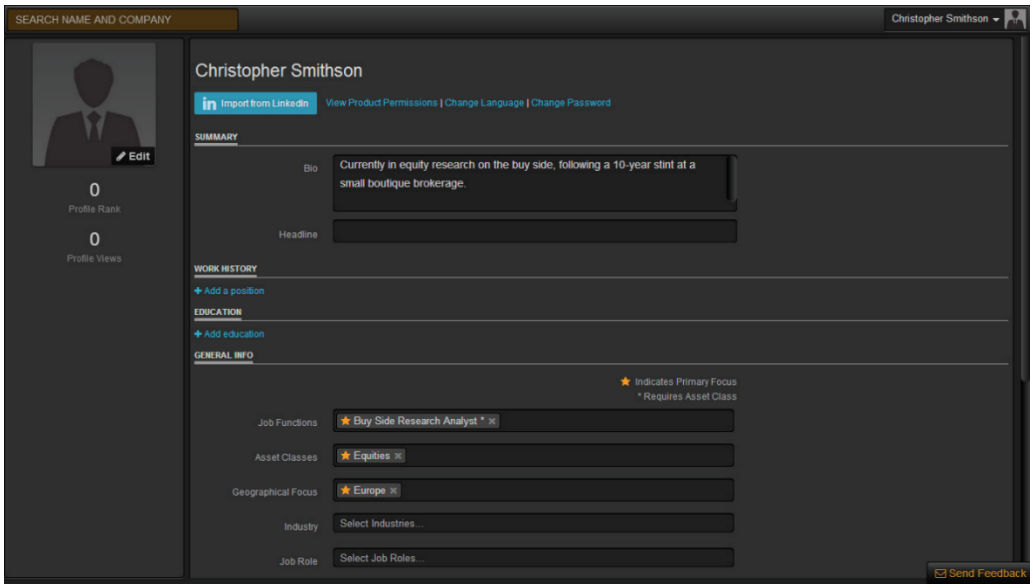
- View on-demand video tutorials to help you get the most out of Refinitiv Eikon.
- Learn the basics so you can get up and running quickly.
- Explore learning by segment to ensure you are making the most of the tools available for your market.
- Bookmark training so you can complete it at a time convenient to you.



Customizing your profile

Creating your profile

When you sign in for the first time, Refinitiv Eikon prompts you to customize your profile. Be sure to fill in Job Functions and Asset Classes: this information is used to suggest the features and apps most appropriate for your role.



Updating your profile

You can edit your profile information at any time.

Go to > Preferences > My Profile to reopen your profile page and make your changes.

Basic Navigation

Getting to know the toolbar

Immediately after logging in, the toolbar appears at the top of your screen.

ⓘ To move the toolbar, just right-click it and choose Undock, then drag it to a new position.

❶ Refinitiv **Eikon** button. Click here to access the app menu, App Library, saved workspaces, settings, and Help.

❷ The Search box is powered by **Autosuggest** and **Answers**. Use it to find apps, data, or answers to your questions.

❸ What's New in Eikon

❹ Favourites

❺ Alerts

❻ Open workspaces appear here. Workspace 1 is open by default.

❼ You can create, save, close, or load workspaces.

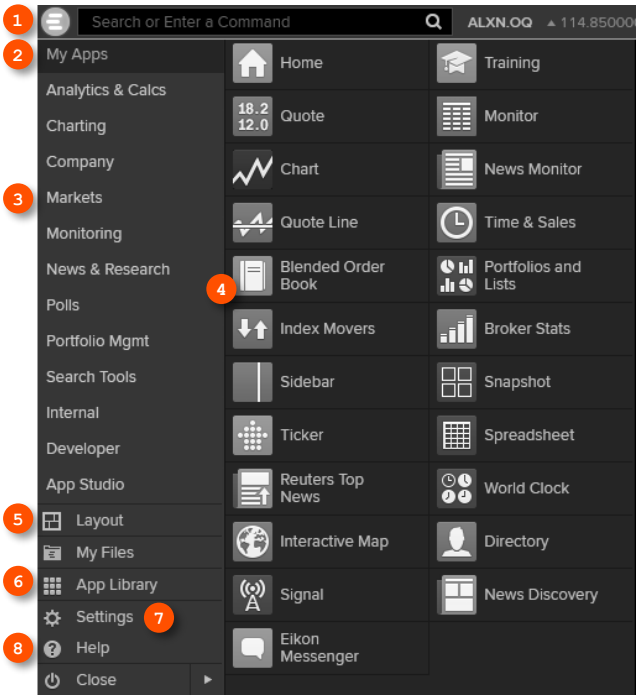
❽ Messenger

❾ My Briefcase

For eLearning, choose **Getting Started with Eikon**: **New User** from the **Learn the Basics** category in the Training App.

Finding apps and defining settings

1. Click to open the app menu.
2. **My Apps** features apps for your specific asset class. You can add, remove, or rearrange apps in this menu.
3. Other apps are displayed by category.
4. Click **Help** to access online help, to contact us, to find out what's new, and other support options.
5. **Layout** holds all your saved workspaces and layouts
6. The **App Library** is a searchable database of all apps.
7. Click **Settings** to define global options, trading settings, and more.
8. Click **Help** to access online help, to contact us, to find out what's new, and other support options.

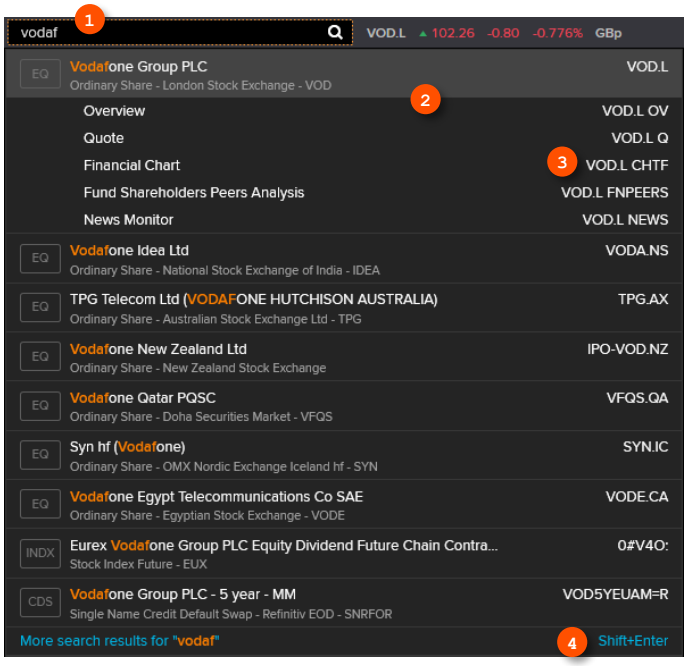


Searching for content and getting answers

Search box: a starting point for your workflow

The Search box is your starting point to navigate anywhere. Just start typing and Autosuggest will propose results.

1. Start typing `Vodafone` in the Search box.
2. Autosuggest displays results.
3. Click a result to load content. For example, you can open the Chart App with data for Vodafone already loaded.
4. If you don't find what you are looking for, press **Shift+Enter** or click here to run an advanced search.

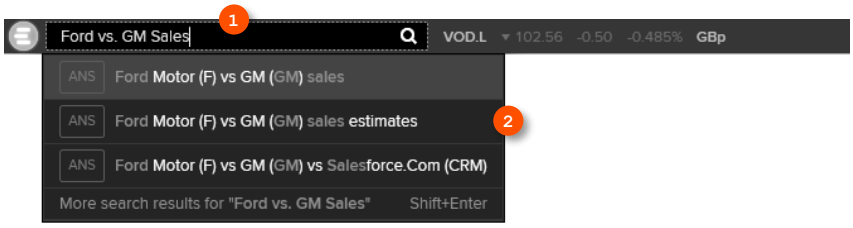


Sample searches

Company names or common abbreviations	Microsoft, Vodafone, ibm
Descriptive terms	Comex copper, vodafone common stock
Standard industry codes	Ticker, ISIN, Cusip, Sedol, WERT
Specific and partial codes	US4592200HJ3, MSFT, USTB
Ticker, coupon, and maturity	VOD >7.5%, Vodafone 2015
Country names for country guides	France, UK, Japan
News searches on specific instruments or topics	IBM news, China news, UST news

Answers: asking your questions in natural language

Type a query using natural language. Refinitiv Eikon Answers will appear at the top of the results.



❶ For example, you want to compare recent top-line trends for Ford and GM. Type Ford vs GM sales.

❷ Autosuggest interprets your query. ANS prefixes results from Answers. Click the result that matches your question to view a detailed revenue chart comparing Ford and GM.

ⓘ You can find answers to frequently asked questions. Start typing How do I... and you will see FAQs in the Search results.

Sample Answers queries

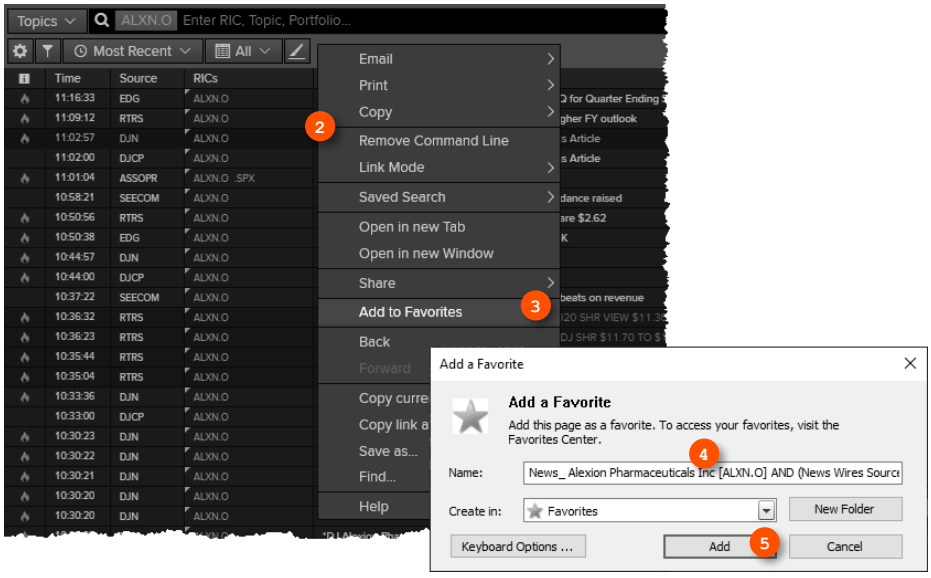
Ford vs GM sales
Google EBITDA estimate
French tech companies

ⓘ For more help and to see examples, type ANSWERS in the Search box and choose the top result.

Bookmarking your favorite content for easy access

Add apps and other content to your Favorites for easy retrieval later on. Open the Favorites Center by clicking the **Favourites** button in the top right of any screen.

1. Open an app.
2. Right-click the app. ❷
3. Click **Add to Favorites**. ❸
4. Give your Favorite a name ❹, choose a folder to save it in (or create a new one).
5. Click **Add** ❺ to save it.



ⓘ Use the Right-Click Favorites folder and your Favorites will be available in the right-click menu of any app.

Using your floating workspace

Refinitiv Eikon – Version 4 features a floating workspace that displays multiple apps of your choosing. This flexible format means you are not restricted to one size or shape, and can customize screen real estate to suit your needs. With just a few clicks, you can:

- add the apps you want
- size them to meet your requirements
- “snap” them together so that they move as a single entity
- stack them to create tabbed windows so that you can flip back and forth
- arrange them around other applications such as Microsoft Excel or Outlook
- link them together so that they share data

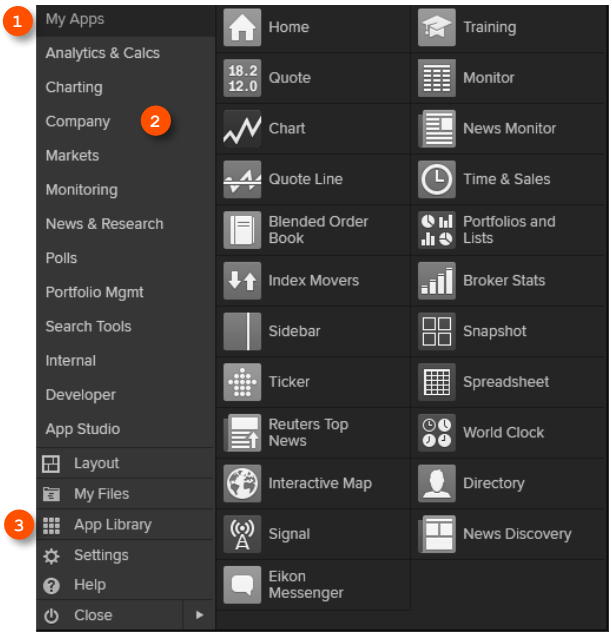
Exploring apps for your asset class

❶ My Apps gives you one-click access to the apps most frequently used in your asset class. For example, default apps for an equities trader include Quote List, Option Watch, and Time & Sales App.

❷ Other categories help you find the apps suited to your workflow

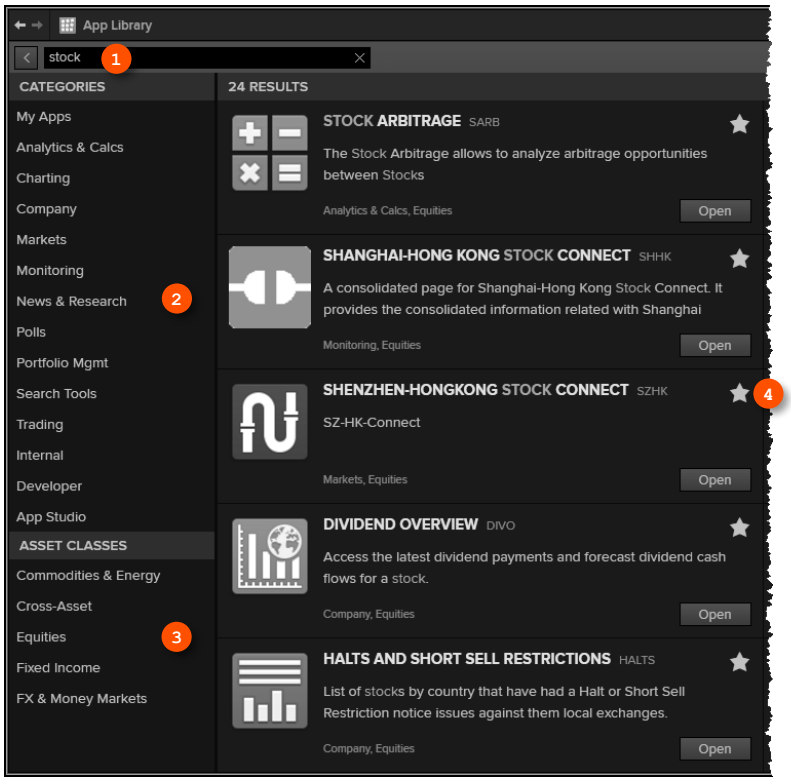
❸ Click App Library to view the full list of available apps.

ⓘ You can rearrange apps in My Apps by dragging the icons and dropping them to a new location. You can also add or remove apps.



Browsing the App Library

1. Begin typing an app name in the **Search** box. Results appear below.
2. Choose a Category or Asset Class 3 to narrow down your results.
4. Click on the **Favorites** icon to add an app to My Apps for faster access.



Setting up your workspace

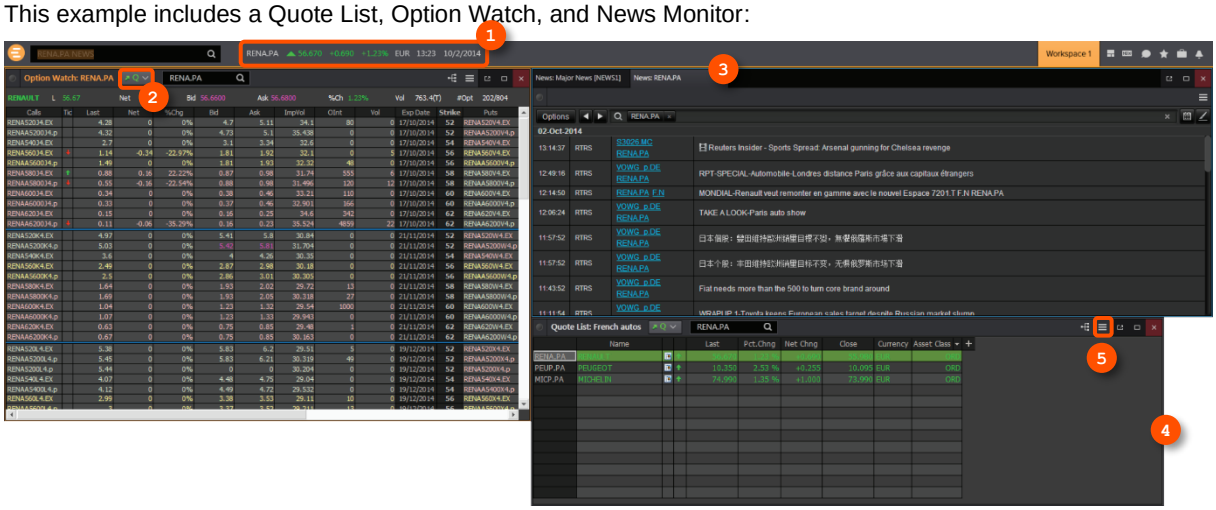
Creating a new workspace

1. Click a workspace name to make it the active workspace. You can have up to ten workspaces open at any time.
2. Right-click a workspace to save, close, or rename it.
3. Click **Show Workspace Menu** to:
   - add a new workspace
   - access templates for different asset classes
   - share and save workspaces

Adding apps to your workspace

When you open an app by selecting it in the app menu, the App Library, or through the **Search** box, it automatically becomes part of your active workspace.

This example includes a Quote List, Option Watch, and News Monitor:



1. The active symbol (in this case, Oracle <ORCL.K>) is the most recent financial instrument you have focused on. When you add an app, it automatically displays data for the active symbol.
2. Click an app title bar to move the app. Click and slowly drag an app until its frame touches another app: the two apps “snap” together, and you can move them around as a single entity.
3. Add News Monitor to your workspace to get:
   - the latest market-moving news
   - historical news archives
   - feature-rich, intuitive user interface
4. Resize an app as you would any other window: just click the frame and drag to the new size.
5. Use auto-stacking so that new apps open automatically as tabs in the same window. This saves screen real estate. Go to ☰ > View > Auto Stack Window to turn auto-stacking on.

ⓘ For eLearning, go to choose The News Monitor App from the Price & News Discovery category in the Training App.

Linking apps together

You can link apps together so that they share the content of your chosen instruments. Color-coded apps “tune in” to the same data stream.

1. This example includes Index Movers App, Quote Line App, and a company overview page.
2. In the top left of each app, click **Link Channel** to choose a color. Choose whichever color you prefer.

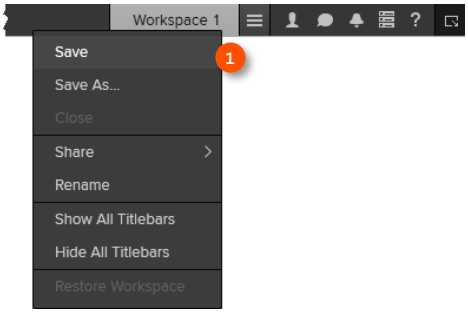
3. Now that the apps are linked, type a new instrument code into any app. All other apps will automatically display content for the new instrument.

ⓘ For eLearning, choose Managing the Eikon Workspace from the Learn the Basics category in the Training App.

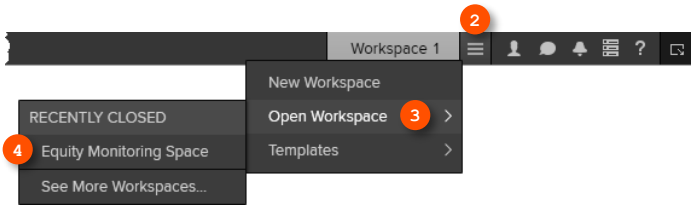
Saving or sharing your workspace

After creating your workspace, you can save it for later use or share it with colleagues. Just right-click the workspace tab in the application toolbar and choose **Save**. You will also be prompted to save any unsaved workspace changes when you close Refinitiv Eikon.

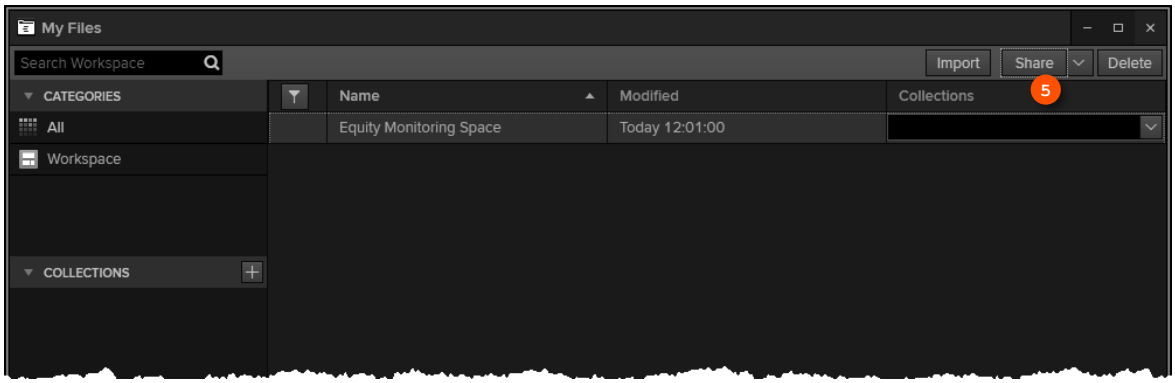
1. Right-click the workspace tab and choose **Save**.



2. To see your saved workspaces, click **View Workspace Menu**.
3. Click **Open Workspace**
4. Select the workspace you want to open.



5. View your saved workspaces and layouts.
   You can share content with your colleagues or other Messenger contacts – just click **Share**.

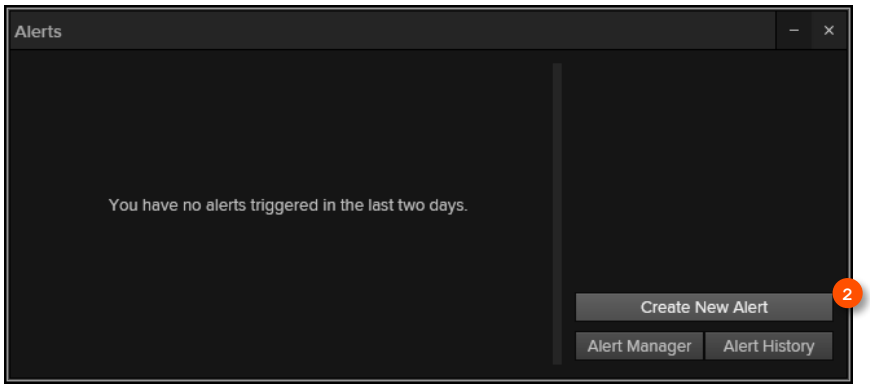


Getting alerts for market-moving events

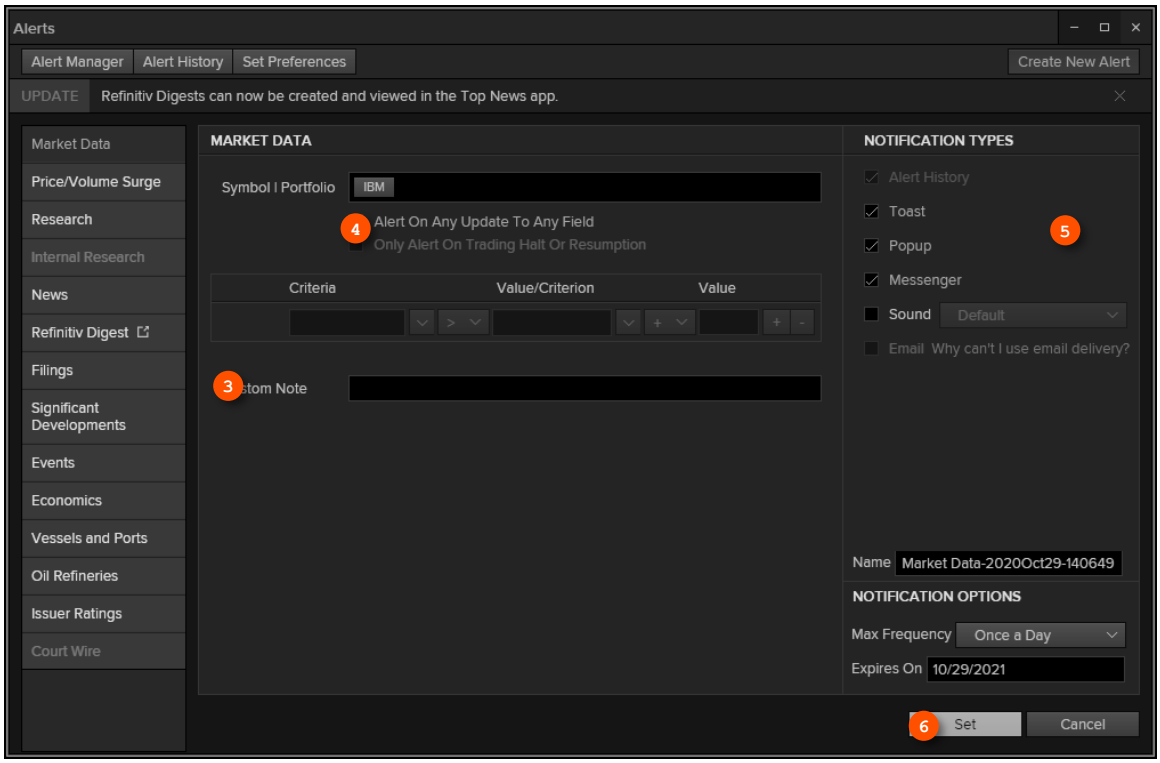
Get informed immediately of market-moving information with Alerts.

1. Click in the top right of the toolbar to open **Alerts**.

2. Click **Create New Alert**.



3. Choose the type of data or event to trigger the alert.
4. Fill in the alert criteria. For example, you can receive an alert when the instrument price hits a certain threshold. You can easily combine criteria, and Autosuggest helps you find the right instrument quickly.
5. Choose how you want to receive alerts.
6. Click **Set** to activate your alerts.



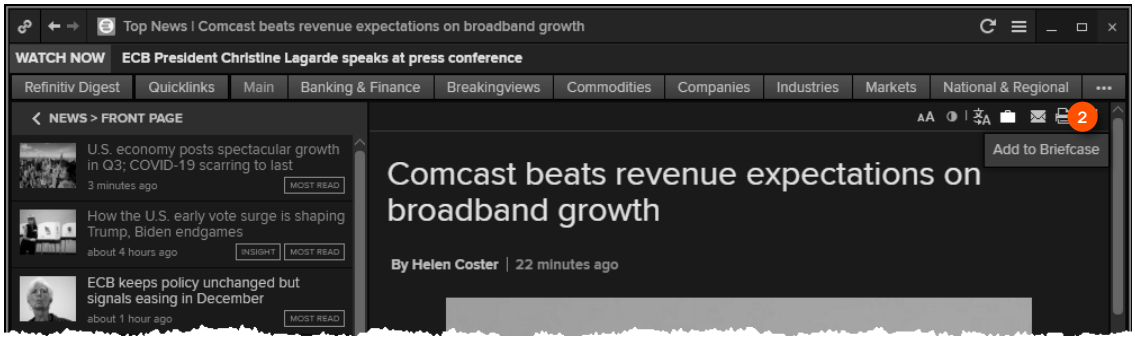
ⓘ You can set alerts directly from other apps. Just right-click the instrument you are interested in and choose **Set Alert**.

ⓘ For eLearning, choose Creating and Managing Alerts from the Price & News Discovery category in the Training App.

Syncing your desktop to your mobile device with My Briefcase

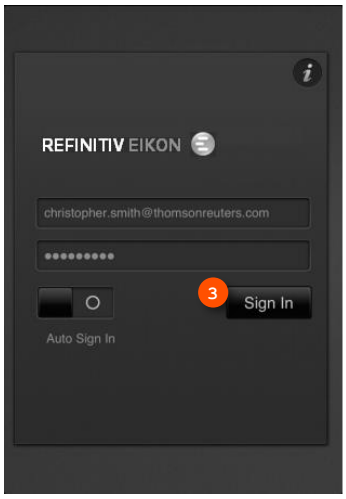
With My Briefcase, you can collect news and documents and read them later, either on your desktop application or from your mobile device, even when you are offline. You can open My Briefcase by clicking in the top right of your toolbar.

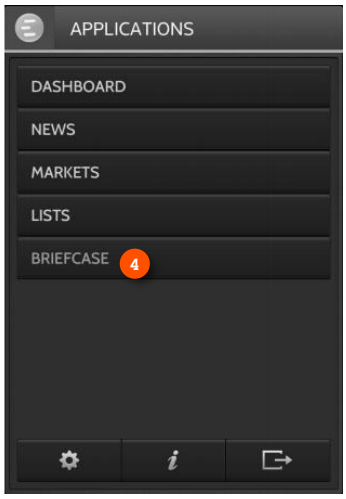
1. Open an app and display filings, research, events, or news. For example, country news is available in > Markets > Countries & Regions.
2. Click **Add to Briefcase**. ❷



3. Sign into your mobile device. ❸
4. Go to **Briefcase** in the **Applications** menu to find the article you saved. ❹

ⓘ For eLearning, choose Using the Briefcase from the Price & News Discovery category in the Training App.





Monitoring your portfolios

Making a portfolio or list

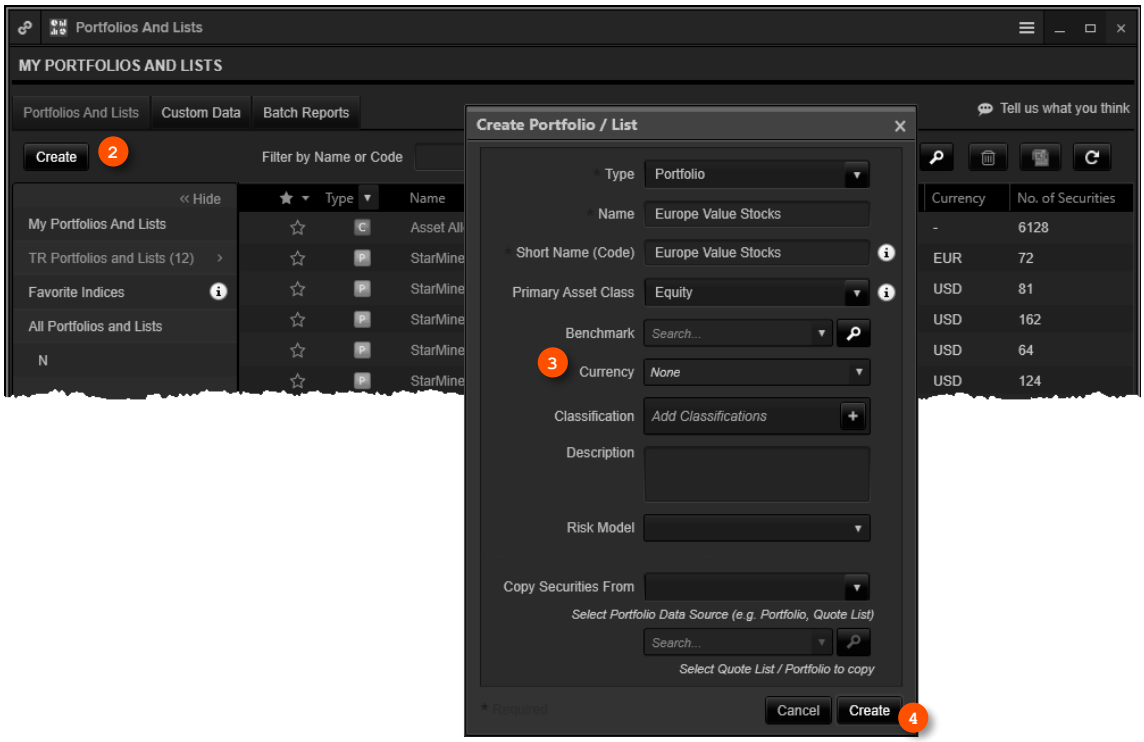
Lists are sets of financial instruments that you define. Portfolios are predefined or custom lists that include the quantity of each financial instrument, as well as historical purchase prices. You can:

- create lists and portfolios
- use predefined portfolios, for example, based on major stock indices
- share them with other colleagues
- reuse them in other apps, or on your mobile device
- export them to Microsoft Excel

1. Open Portfolios and Lists.

   Remember, you can open an app from the app menu, or find it using the **Search** box.

2. In this example, let's make a portfolio. On the **Portfolios And Lists** tab, click **Create**.

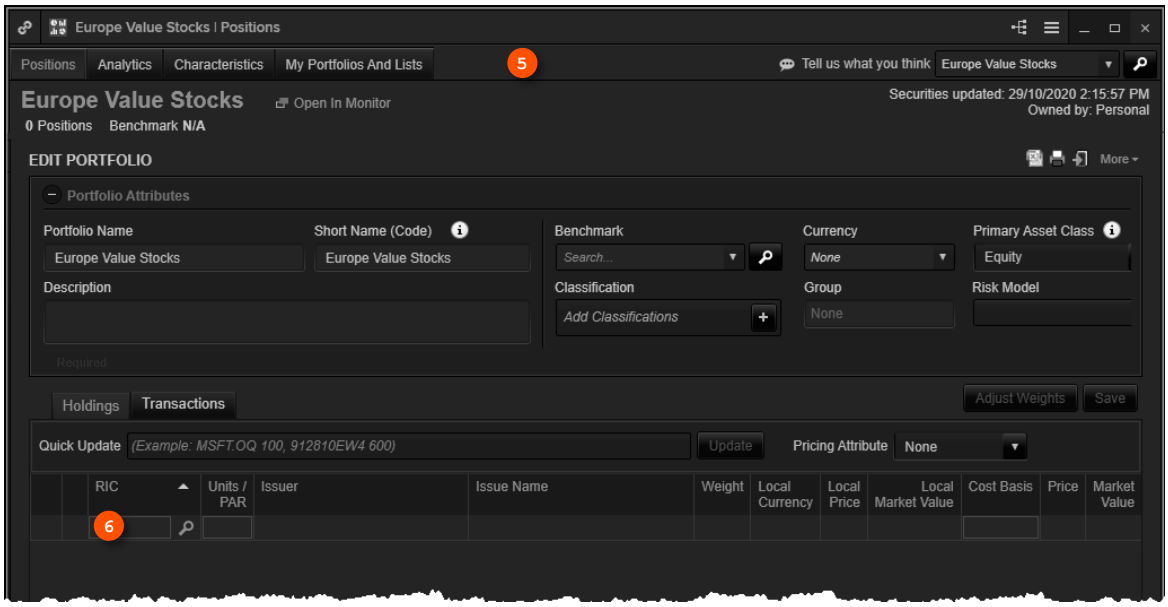


❸ Enter details for your new portfolio, including a name, benchmark index, primary asset class, and currency.

❹ Click **Create** to make your new empty portfolio. On the next screen, you will add instruments and other details.

❺ Use the tabs at the top of the app to run analytics, create reports, search for news about the instruments in your portfolio, and more.

❻ Add holdings to your portfolio here. You can then indicate transaction dates and values on the Transactions tab.



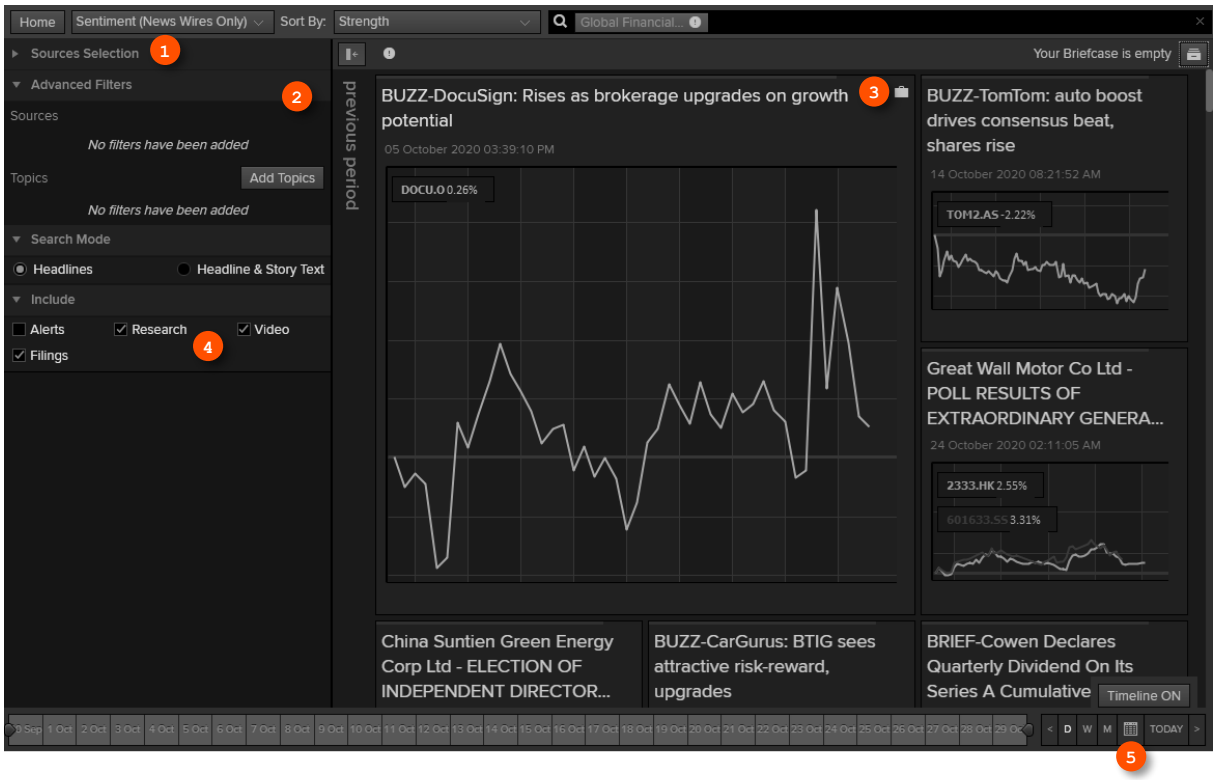
ⓘ Refinitiv Integration Services can help upload your portfolios easily. Contact your Refinitiv representative.

Following news that affects your portfolio

News Discovery offers different insight into NewsWires, Global Press, and Reuters Top News through data visualization.

- Get streaming and historical news enhanced by charts, videos, tweets, and more.
- Charts and story snippets in the headline dashboard tell you the crux of the story at a glance.
- View news on the companies in your portfolios.
- Filter by story sentiment (NewsWires only), or by date and time.
- Add advanced filters and save them just as you do in News Monitor.
- Create filters, order by date/time or sentiment, or simply view news for the current day.

News Discovery is available in the News & Research app menu, or by typing *NEWSD* in the **Search** box.



❶ Choose how you want to filter news. In this example, let's filter by portfolio.

❷ Select the portfolio you want. All news articles related to instruments in your portfolio are displayed.

❸ Hover over the top right of an article to display the Briefcase icon. Click **Add to Briefcase** to save your article so that you can read it on the go from your mobile device or web browser.

❹ Select the news sources you require, and add advanced filters in this area.

❺ Use the **Timeline** toggle button to display news in reverse chronological order or based on the date and time criteria you have chosen.

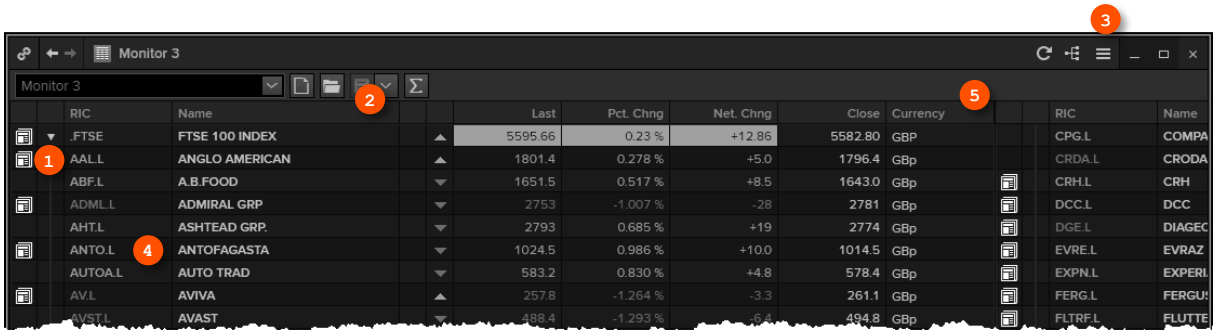
Watching the markets with Monitor

Monitor lets you watch instruments and multiple portfolios. You can create and modify your Monitor quickly and easily, choosing data fields from the Refinitiv Eikon database and sharing your list with colleagues.

You will find Monitor in the **Monitoring** app menu.

Remember, you can open an app from the app menu, or find it using the **Search** box.

To create your instruments, launch **Monitor** and just start typing. Enter ticker symbols, or type a company name and choose from Autosuggest.



1. Press **Enter** to go to the next line, **Delete** to delete a row, **Insert** to add one, **Ctrl-z** to undo an action, or **Ctrl-y** to redo one.
2. Right-click a header to sort data or add columns. Also use the right-click menu to access display preferences.
3. You can create multiple Monitor lists. The app saves your changes automatically. To access saved lists or to rename lists, click the app menu and choose **File > Open** or **Rename**.
4. For indices, you can expand or contract the list of constituents by clicking the grey arrow.
5. Double-click a header name to change the data field. Autosuggest helps you find the Refinitiv data you are looking for.

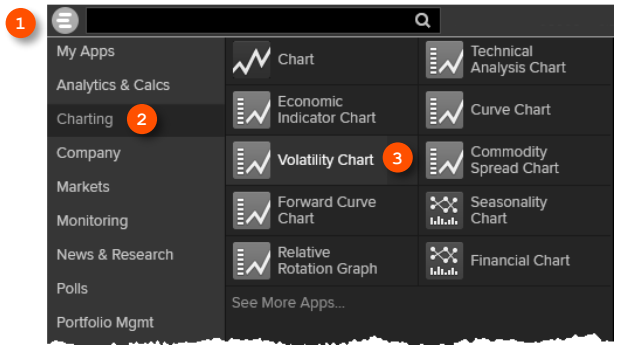
For eLearning, choose **Monitor your Portfolios and Lists** from the **Price & News Discovery** category in the Training App.

Charting and technical analysis

Using a Workflow chart

Workflow charts are predefined charts for various asset classes. You can find them under **Charting**.

1. Click to open the app menu.
2. Click **Charting**. Workflow charts for your asset class appear, along with Chart App.
3. Select a chart, for example, select **Volatility Chart**.

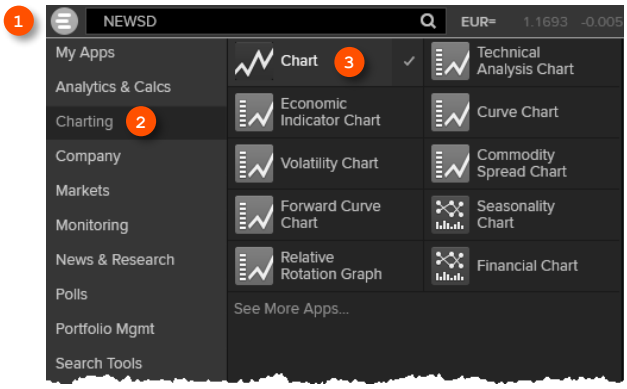


4. Fill in the instrument, analysis parameters, and other settings.

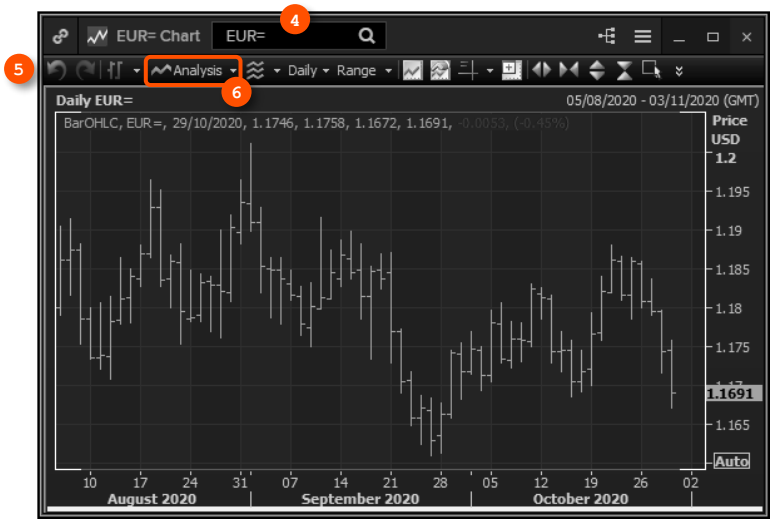
Creating a custom chart in Chart App

Chart App is a powerful, flexible tool for technical analysis. Build your analysis from scratch and configure it to fit your needs.

1. Open the app menu.
2. Click **Charting**. Workflow charts for your asset class appear, along with Chart App.
3. Select Chart.

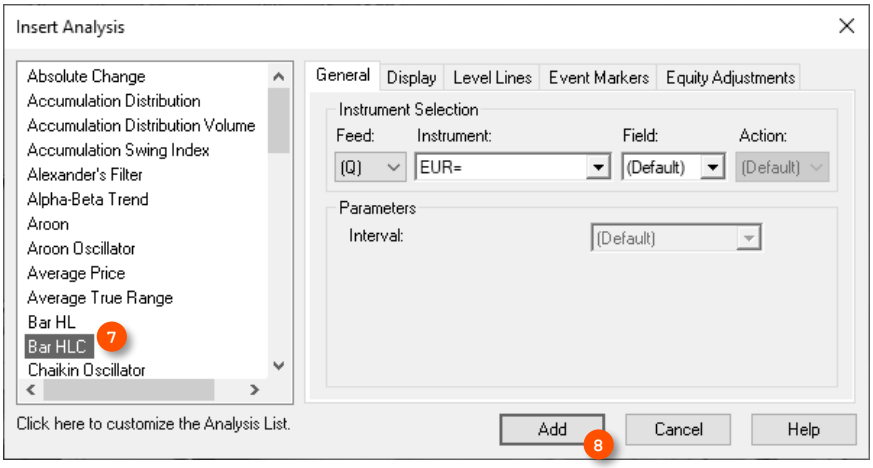


4. Type an instrument code and press **Enter**.
5. Use toolbar buttons to adjust your chart range, interval, and line types.
6. Click on the **Analysis** button to add a new analysis.



7. In the **Insert Analysis** dialog box, select an analysis.
8. Click **Add** to insert it. To find out more about an analysis, select it and press **F1** to open online help.

ⓘ To edit your chart, just click any label and choose a new setting from the drop-down box that appears.

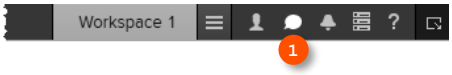


ⓘ **For eLearning**, choose **Getting Started with the Chart App** from the **Charting** category in the Training App.

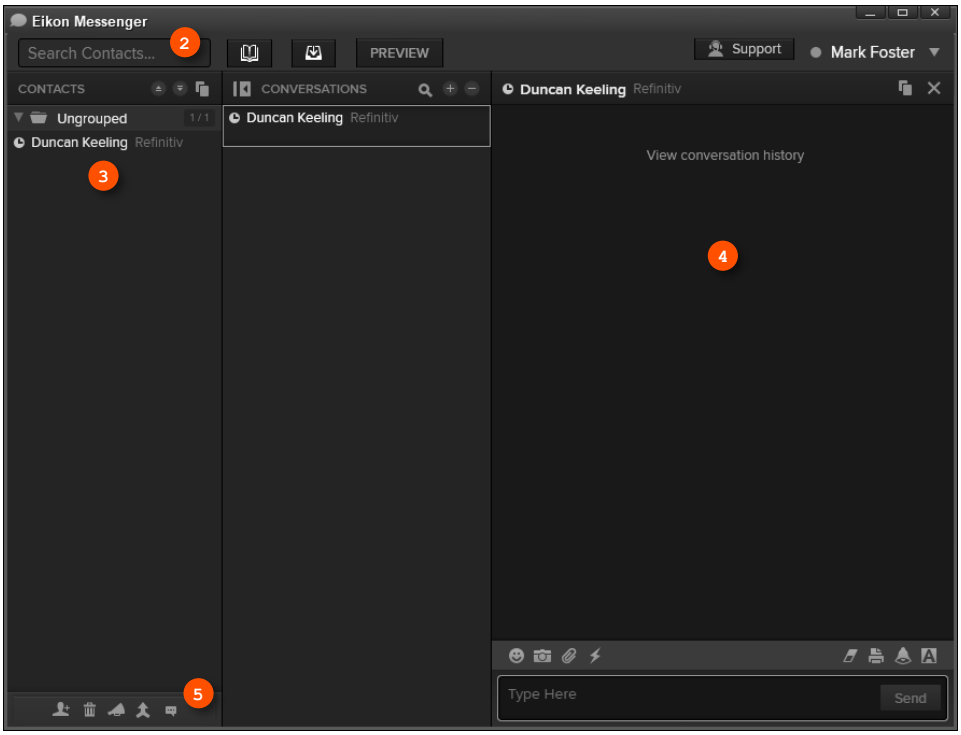
Financial communities

Using Refinitiv Messenger

1. Click the **Messenger** button on the toolbar to open Messenger.



2. Begin typing here to search the directory or your contacts.
3. Right-click a contact name to view their profile, or double-click to start a conversation.
4. View active conversations in this area.
5. Use these buttons to add a contact, create a group, or send a blast.



ⓘ Tip: Messenger is enhanced every month with new features.

To find out about new enhancements, don't forget to check the **What's New** page frequently. Just click the **New** button in the top right of your toolbar.

For eLearning, choose **Getting Started with Eikon Messenger** from the **Collaborating** category in the Training App.

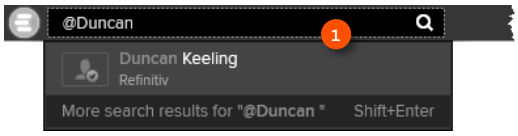
Contacting Customer Support for help

1. If you need help, you can contact Refinitiv Customer Support anytime from Messenger. Just click the **Customer Support** button at the top-right of the window.

Sending messages directly from the Search box

You can send a quick message to any of your contacts (including Customer Support) without opening Messenger.

❶ Just type @ and your contact's name in the **Search** box.



❷ Then type your message and press **Enter**.

ⓘ Tip: You can also write to chat rooms and groups you create in your list of contacts.

Searching the directory, viewing profiles, and building your network

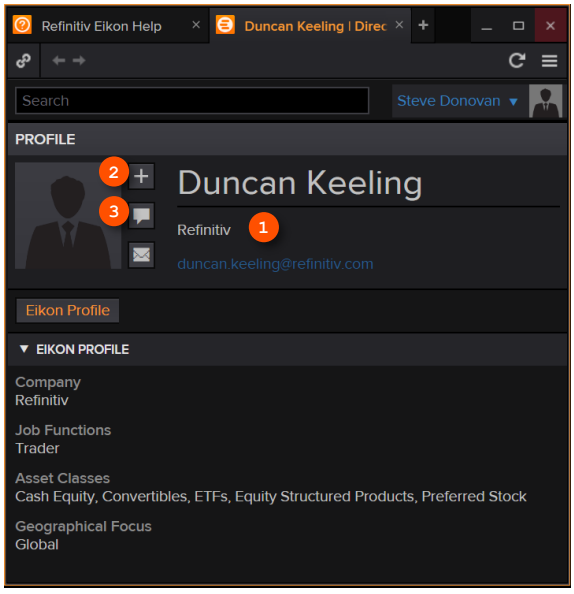
Messenger gives access to a global financial services directory for the combined Refinitiv Eikon and Markit Collaboration Services networks. This is the financial services industry's first open, cross-network directory. It enables users across the industry – including those on internal networks – to find and communicate with each other safely and compliantly.

Over 250,000 users are now accessible across the combined Eikon and Markit networks.

1. In Messenger, begin typing to search for a person or company.
2. Right-click a name to view more details.
3. Click the person's name to view their profile.

On the profile page:

- See the person's profile and contact details ❶
- Add the person as a contact ❷
- Send a message via Messenger or email ❸



Refinitiv Eikon – Microsoft Office

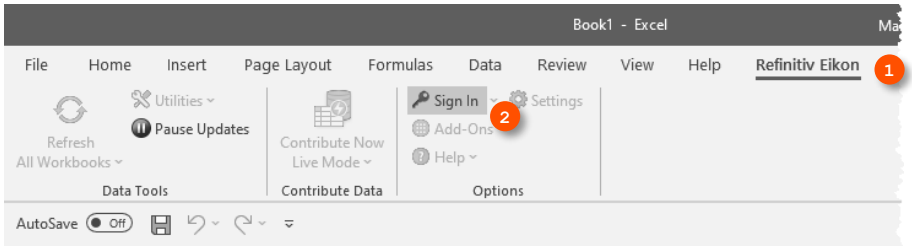
Discovering Refinitiv Eikon – Microsoft Office

Refinitiv – Microsoft Office, an integral part of Eikon, is a self-installing Microsoft Excel add-in. With it, you can:

- retrieve real-time, historical, and fundamental data by using the Formula Builder or the In-Cell Builder
- analyze equities using the integrated Screener
- build charts with your financial data in your worksheets for market analyses
- access and customize advanced templates provided by Refinitiv
- build lists and portfolios, and access those created in Refinitiv Eikon Desktop
- export and link Excel data and charts to documents or presentations in Word or PowerPoint
- create presentations and documents customized to your company's own visual identity

Logging into Refinitiv Eikon – Microsoft Office

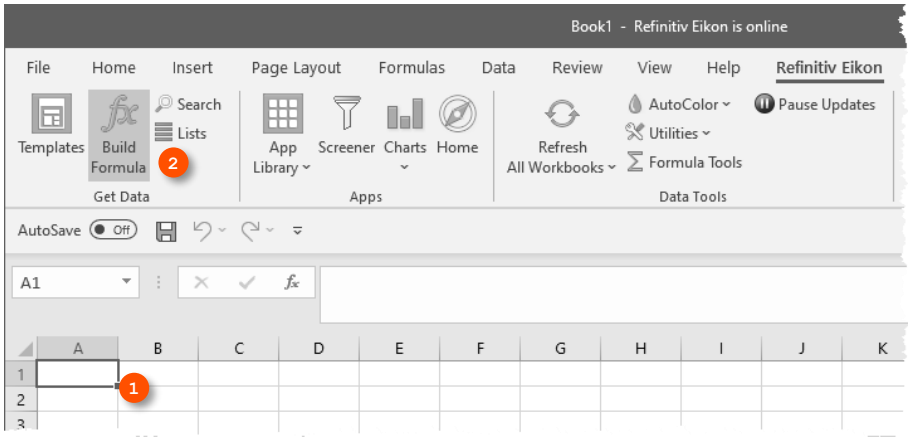
1. Start Microsoft Excel.
2. Click the **Refinitiv** tab ❶ to open the Refinitiv Eikon menu.
3. Click **Sign in** ❷ and type your Refinitiv Eikon credentials if prompted.



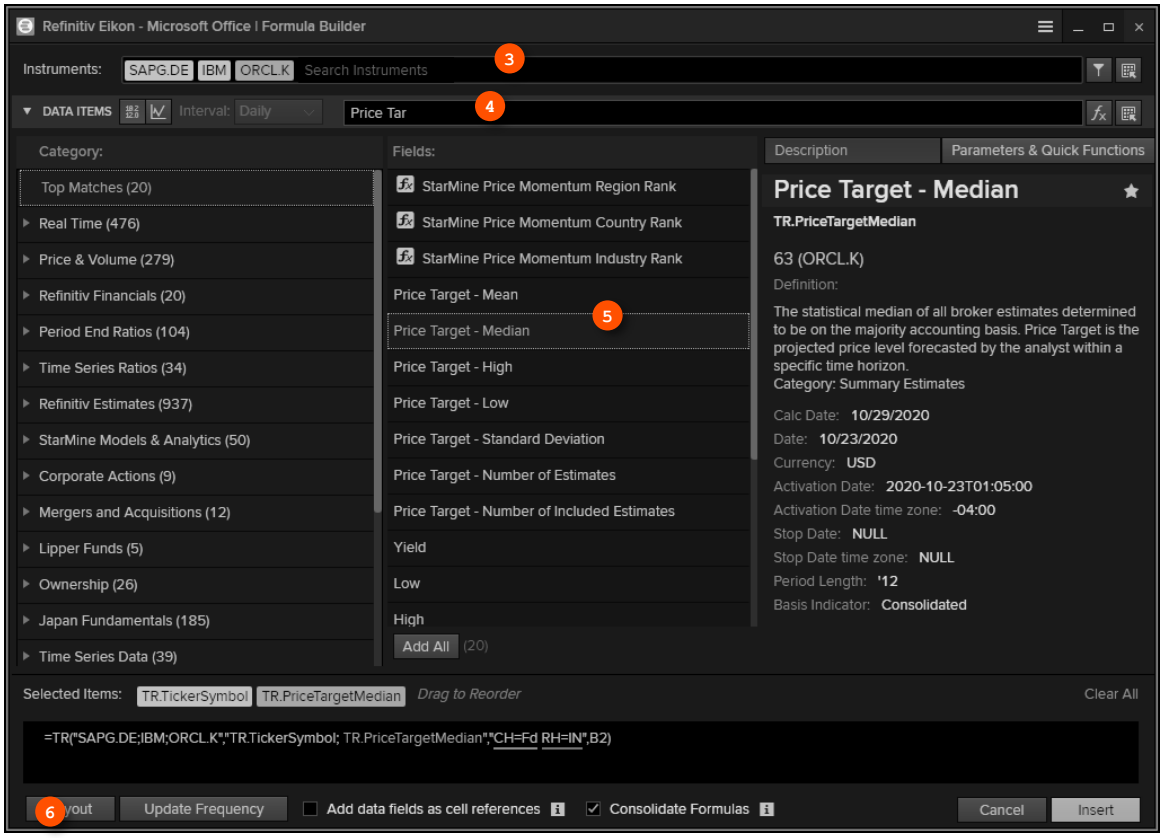
Open the Training App and choose the Excel & Analytics category to see the full range of training materials for Refinitiv Eikon – Microsoft Office, from basic features to advanced data retrieval and automation.

Using the Formula Builder to retrieve Refinitiv data

1. Select a blank cell on your worksheet ❶, then click Build Formula ❷ on the Refinitiv tab.

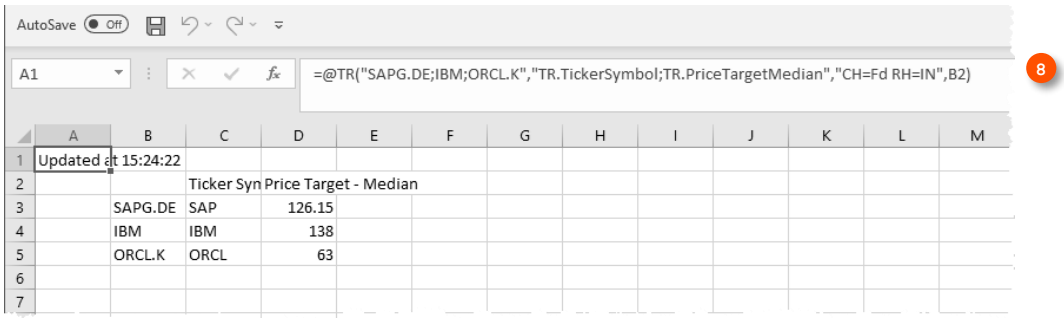


2. In the Formula Builder, enter (or search for) the instruments you want data for ❸.
3. Select the data source you require (real-time & fundamental or time series), then enter the data item(s) you want to include ❹. For each data item, you can define settings in the **Parameters** area. ❺
4. Select other settings, if required. ❻
5. Click **Insert**. ❼



The worksheet embeds the new formula in the cell you selected, and retrieves the related data.

6. In this example, the TR function ❽ is used.

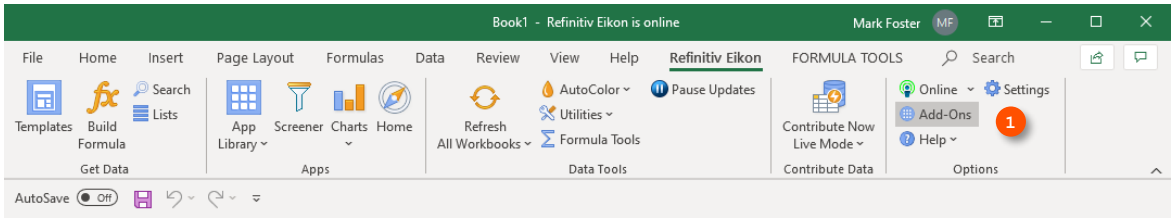


Enabling Datastream, Deal Analytics, Linking, and Presentation Tools

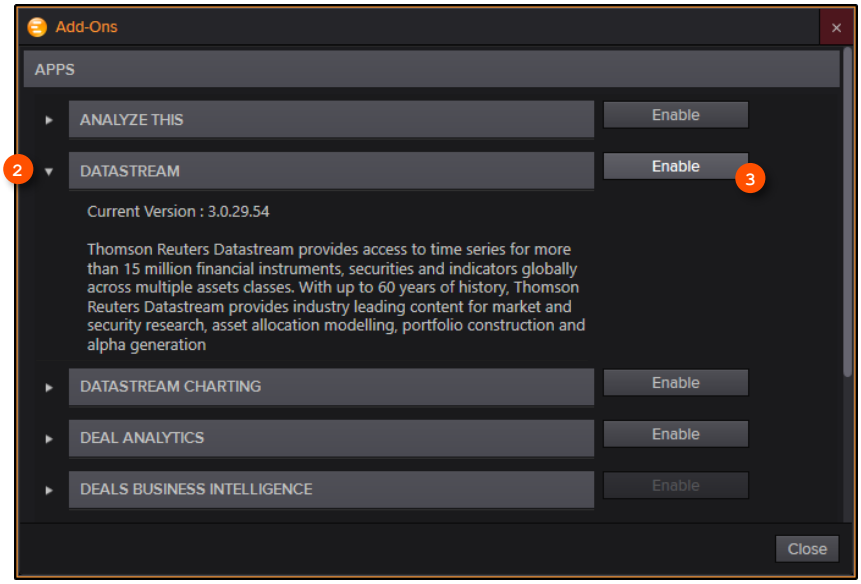
Refinitiv Eikon – Microsoft Office includes additional apps to enhance your productivity.

Note: You must be permissioned to enable these apps.

1. Click **Add-Ons** on the **Refinitiv Eikon** tab.



2. Click to read about the apps.
3. Click the **Enable** button next to the apps you require.
   - Analyze This
   - Datastream
   - Datastream Charting
   - Deal Analytics
   - Deals Business Intelligence
   - Linking



Using Adfin Analytics and other advanced features

Adfin Analytics is a set of powerful cross-market financial calculation libraries. The libraries are targeted for financial spreadsheet users and developers of financial applications. The libraries can be used in different environments, for example in Refinitiv Eikon – Microsoft Office.

ⓘ Tip: In Microsoft Excel, go to **Formulas > Insert Function** to access the Adfin Analytics functions.

For eLearning, choose **Getting Started with Eikon** – Microsoft Office from the Excel & Analytics category in the Training App.

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