



**BLOOMBERG FOR
EDUCATION**

A Bloomberg Professional Service Offering

**GLOBAL FINANCIAL
DATA CROWD SOURCING
PROJECT FOR UNIVERSITY
STUDENTS**

Bloomberg

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INSTITUTION TYPE RESEARCH PROJECT

INTRODUCTION

For this project, students must use their understanding of financial institutions to research various companies and classify them correctly as the appropriate institution type. Can they tell if a certain company is a hedge fund manager? A venture capitalist? A private equity company? They will need to use all available online resources to investigate each company and determine the best classification possible out of list of defined money manager and non-money manager types. Students that provide accurate responses will have their classifications feed directly into Bloomberg's new Investor Screening function and receive a Bloomberg certificate highlighting the quality of their work.

For this project, you will be asked to complete the following:

1. You will be given a company name and a country, city, and state (if available) for which the company is located.
2. Your task is to use all available internet resources (Online search engines such as Google will be your primary tool) to find information to correctly classify the company. The list of institution types and definitions to help you perform these classifications are available on the following page of this document.
3. Provide us with the correct institution type classification.
4. Provide us with the company's address.

More details:

1. If information about a particular company cannot be found, please mark **"Information Not Found"**
2. If information about a particular company can be found but does not match one of the institution types listed below, please mark **"Cannot Determine Institution Type"** and add the type of business in the text box that follows.

IMPORTANT NOTE:

"Cannot Determine Institution Type" should only be used when there is information on the company but it does not fall into one of the pre-set institution types that we already have listed. If you search for the name and just see an address that would be "Information Not Found". Unless there is information to populate the "Type of Business" column, "Cannot Determine Institution Type" should not be used.

1. Please include address of company if available at the end of each company's research. The address that should be used would be the headquarters of the company.

2. Paste the source in the box provided. If the source you are obtaining your information from is the company's website, please answer Yes to the corresponding question.

NOTE: Only mark **"Yes"** if the website found is actually the company's official website. We have seen some cases where **"Yes"** is marked and the source is Bloomberg or Yellow Pages

3. Please limit research to 3 minutes per line

INSTRUCTIONS

Use all available online resources including Google to find information to classify the company provided. Once you find information about the company, first ask yourself:

Is this company a money manager? Do they manage other people's money?

If Yes, please classify using one of the institution types under "Money Manager Institution Types" below

If No, please classify using one of the institution types under "Non-Money Manager Institution Types" below

INSTITUTION TYPES

MONEY MANAGER INSTITUTION TYPES

Hedge Fund Manager - Investment entity that set up as private investment partnerships that are open to a limited number of investors and require large initial minimum investment. Generally the managers have more flexibility in their investment strategy and strive to achieve absolute return. Look for the specific words "hedge fund" when researching the company to make sure the company is a hedge fund manager.

Bank - A company in which a majority of their revenue is derived from banking services including commercial and personal.

Pension Fund - A plan, fund or entity designed to provide retirement income. Established by employers, the common asset pool is meant to generate stable growth over the long term, and provide pensions for employees when they retire.

Private Equity - An investment entity where a majority of their revenue is derived from investment in private companies. These investments are made in order to fund expansion and research or strengthen the financial health of the company. Look for the specific words "private equity" when researching the company to make sure the company is a private equity company. Also, a private company is not necessarily "private equity". It should specifically say "private equity".

Venture Capital - Investment entity that provides financial capital and support to early stage companies with high growth rates. Look for the specific words "venture capital" when researching the company to make sure the company is a venture capital company.

Investment Advisor - Investment entity that manages investor's assets in return for a fee. This service includes investment recommendations, securities analysis and management.

NOTE: Please classify as Investment Advisor if you know the entity is a money manager, but it does not specifically fall into any of the above money manager categories.

ALSO NOTE: If the company name or description you find notes "asset management" or "asset manager", it is likely one of these money manager institution types. If you cannot classify as one of the above types, mark the institution type as Investment Advisor.

NON-MONEY MANAGER INSTITUTION TYPES

Corporation - A legal entity owned by a group of shareholders that generally do not actively manage money.

Government - The agencies or individuals that control a nation or state.

Insurance Company - A company in which a majority of their revenue is derived from providing insurance services.

Holding Company - A parent company which has control over several other companies and generally does not produce any good or services itself.

401(k) - A company's retirement plan with the words "401K" in the title. Look for the specific words "401K" when researching the company or in the company name before classifying as a 401(k) plan.

Stock Ownership Plan - A stock ownership plan for a company, including **ESOP's**. Look for the specific words "ESOP" or "Employee Share Ownership" or "Employee Stock Ownership" when researching the company or in the company name before classifying as an SOP. When the company has ESOP, in the name it should be flagged as SOP. The address will be the address of the parent company. For Example: if you have Green Company ESOP the address will be the address for Green Company.

Estate - A person's ownership at time of death. Look for the specific words "**Estate**" when researching the company or in the company name before classifying as an Estate.

Foundation - A private, nonprofit, tax-free organization that collects and distributes money for charitable purposes. This will usually have the word "**Foundation**" in the name. Please look for this when researching the company before classifying as a Foundation.

Endowment - An investment vehicle used by schools, colleges, and universities. Only use this institution type if the name of the company is the name of a University or College (example: University of South Florida).

Trust - A fiduciary arrangement that allows a third party, or trustee, to hold assets on behalf of a beneficiary or beneficiaries. A company name may include the word "**Trust**", **but it may not necessarily be classified as a trust**. Check to see if it is also an "asset management" company, or any other type of money manager. If the company manages other people's money, use one of the choices above in the Money Manager Institution Types section. If you cannot determine which type of money manager they are, choose Investment Advisor as your institution type.

Family Trust - Similar to a Trust, but held specifically by a group of family members. Look for the specific words "**Family Trust**" when researching the company or in the company name before classifying as an Family Trust.

PARTICIPATION STEPS

WHO SHOULD PARTICIPATE?

Students and research scholars across all years can participate.

HOW TO PARTICIPATE?

Step 1: Sign up for the Crowdfunder Elite Platform at <https://elite.crowdfunder.com/?view=register> to create a login to perform the tasks.

Step 2: Go to <https://www.surveymonkey.com/r/8PF36LG> and fill in your name, email, Crowdfunder login, and school so that we have these for our records.

This is essential for us to be able to create the electronic certificates for you. Please remember that you are responsible for entering your details accurately. We will not be responsible if the login name you enter in the form doesn't match your actual crowdfunder login, or if there are spelling mistakes in your name or School name.

Step 3: Login as a CONTRIBUTOR at <https://elite.crowdfunder.com/?view=login>

This will inform Crowdfunder of your role in the project

Step 4: Start your Tasks! Click the link - <http://bit.ly/bbginsttype>

This is where you will actually perform!

WHEN TO PARTICIPATE (Deadlines)

October 18, 2015: Complete Steps 1-3 above

October 19, 2015: Project Starts

November 15, 2015: Project ends

November 23, 2015: Certificates Issued for successful participants

HOW TO PARTICIPATE SUCCESSFULLY

To be eligible for the Certificate of completion from Bloomberg's Princeton-based Global Data Team you will need

TASKS: over 300 completed

ACCURACY: Over 85%

WHY TO PARTICIPATE

- Be part of an elite team support Bloomberg's best-in-class Global Data product
- Get a prestigious certificate of completion from Bloomberg's Global Data team
- Gain valuable insights into global classification standards for companies.
- Add value to your classroom learning by developing research skills relevant to industry needs
- Earn bragging rights for having supported Bloomberg to make the terminal richer and more accurate

For any queries, Please reach out to Leah Dodell ldodell2@bloomberg.net and

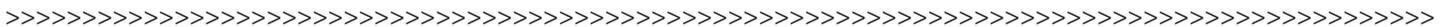
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