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Marketplace Data & Solutions Communiqué

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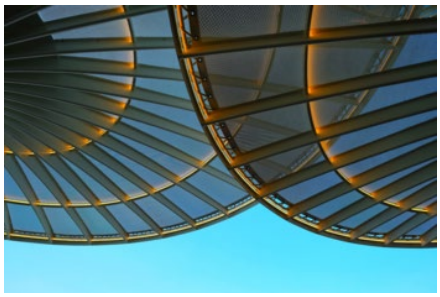
Spotlight



Global Events Plus Now Available

In June, we released our new Global Events Plus dataset, which offers structured summaries of past and future corporate events such as earnings calls, shareholder/analyst meetings, expected earnings release dates and more. This dataset covers over 1,000 scheduled events daily across 32 event types. Global Events Plus is available on XpressfeedTM and will be available soon on Snowflake.

You can use this dataset to derive signals and support trading models across asset classes, trading styles and frequencies. This dataset also supports research and analysis, risk management and compliance, and trade surveillance workflows.

Global Events Plus offers point-in-time data (with history from August 2018 onward) based on the product delivery date to facilitate time series analysis. Data is delivered in real time with span delivery to support trades based on directional movements. Additional benefits include point-in-time split and dividend information and standardized date and time reporting in both UTC and originally reported time zones.

Physical Document Search and Download Service for Company Transcripts

On June 27, we released Transcripts on our Physical Document Search and Download Service on the S&P Capital IQ API. This service allows you to search for and retrieve Transcripts documents, including company conference presentations, guidance/update calls, earnings calls, and other event types.

We released our new Physical Document Search and Download Service for Company Filings in May. The Filings Search and Download Service provides annual and quarter-period reports from EDGAR as well as S&P Global sourced annual, quarterly, and supplemental reports, and sustainability disclosures.

Marketplace Generative AI Search Expansion to Homepage and Blueprints

Marketplace Generative AI Search enables improved discoverability and exploration of S&P Global offerings on Marketplace through natural language question and answer. The Large Language Model (LLM) is trained on the information and metadata on Marketplace along with User Guides from the Marketplace Support Center to allow users to ask questions about our offerings.

This Phase II release builds upon our initial Generative AI release in February, which provided an enhanced search experience for Dataset and Solution tiles. We have now integrated the search functionality into both the Marketplace Homepage and Blueprint tiles, further expanding search capabilities to improve the user experience and data discovery journey. As you explore the new search navigation, please share your feedback here to allow us to continue improving the overall user experience.

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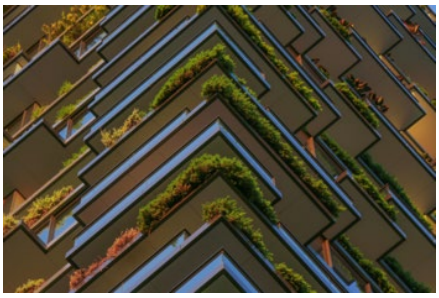
Xpressfeed™ and Snowflake®



Recent Enhancements

New Ownership Type in Intel Company Relationships V3

We recently enhanced our Intel Company Relationships offering with OwnershipType data (or StakeType). The StakeType enables clients to develop custom logic for determining a firm's ultimate parent or relevant corporate structure.

The StakeType is available in a new Intel Company Relationships V3 package. Reference data for the stake type is delivered in the ciqCompanyRelType table in the Company Relationships Reference package. This data is available on Xpressfeed and Snowflake.

New Methodology Description in Physical Risk Data

As part of S&P Global's ongoing efforts to enhance our Physical Risk Data offering on Xpressfeed and Snowflake, effective June 13, 2024, we enhanced data item ID 326412, description of methodology on the refined framework, incorporating modeling based on the following approaches (listed in descending order of preference):

1. **Asset Level Data:** In cases where at least two assets are available for a given company, the company-level exposure scores and financial impacts will be calculated as a weighted average of the results for those assets.

2. **Country Revenue Exposure:** Where only one asset is available for a given company, the company-level exposure scores and financial impact will be calculated based on the results for that asset and a weighted average of country-level physical risk metrics (weighted by country revenue share).

3. **Country Average:** Where only one asset is available for a given company and no geographic revenue data is available, company-level exposure scores and financial impact will be calculated based on the country average physical risk for the company headquarters country.

Coming Soon

Upcoming content enhancements via S&P Global Data on Snowflake and Xpressfeed:

As-Reported Financials
The new as-reported financials offering will allow you to access financial statement data as the company reported while gaining deeper insight from the details collected from the footnotes, bringing efficiency and transparency to your financial data workflows.

Headcount Analytics
The Headcount Analytics dataset provides employee data for 3.8M+ companies worldwide. Aggregated from a variety of sources and online platforms via a third party, this data enables deeper insights and detailed analytics such as hiring/layoff trends, tenure, and churn, all categorized by role and function.

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EU Taxonomy Data: Independent Assessment
We plan to release EU Taxonomy Independent Assessment (IA) data, which helps financial institutions report EU Taxonomy alignment and incorporate the framework in decision-making.

Announcements

Migration to New SFTP Platform

As previously announced, we are pleased to introduce a new FTP file delivery platform offering improved performance, security, and reliability. The new SFTP platform will replace file delivery for S&P Capital IQ, Compustat, GICS®, RatingsXpress®, and all other files currently hosted on the Enterprise Data Xchange (EDX) FTP. All XpressfeedTM files from the EDX FTP server will be migrated to the new SFTP server, and you will need to switch your processes to source files from the new SFTP server instead of the EDX FTP server.

The migration to the new platform will take place in waves. This will ensure we can provide dedicated support to assist you during the migration period. We will send a separate email with your credentials for SFTP and further instructions on accessing your files on the new server. Please visit the Marketplace support site for resources to help you make the most of the new platform:

- Migration Guide compares file delivery platforms side by side
- SFTP Technical Guide includes details for non-Loader clients on how to access and process packages

More Platforms

Capital IQ Pro Release Highlights

With this release, we've added new datasets and tools on Capital IQ Pro designed to enhance your daily workflows:

1. Newly integrated data: fixed income coverage including19.4 million Government, Supranational, Agency, and Corporate securities from Markit, industry-level content for Banking, Insurance, Real Estate, Energy, and TMT, and expanded private markets coverage, including adding 14 new energy-related topic tags and Preqin's Private Debt asset class dataset.
2. Transcript Summarization, which provides a summary of earnings call transcripts organized by Topics and Sentiment that offers a comprehensive overview of the discussions within each call.
3. S&P Capital IQ Pro Labs enables collaboration with users on innovation initiatives for Capital IQ Pro and showcases beta applications and solutions, allowing clients to explore, experiment, and provide feedback. Visit Labs on the top Menu or add Labs to your list of current menu items by selecting Edit on the top Menu.

Access the full release notes here.

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API

Recent Enhancements

Static IPs Now Available

Static IPs are now available for our APIs and can be provided to clients for safelisting if required. For more information, please contact Enterprise API Support.

New Methodology Description for Physical Risk

We recently enhanced Physical Risk data on XpressAPI. Physical Risk data provides company- and asset-level assessment of the physical risks resulting from climate change. The physical risk assessment is based on scores that measure the risk of climate change as well as scores that reflect a specific company's relative sensitivity to climate change indicators.

The enhancement includes the addition of a descriptor for the refined framework, incorporating modeling based on the following approaches (listed in descending order of preference):

1. **Asset Level Data:** In cases where at least two assets are available for a given company, the company-level exposure scores and financial impacts will be calculated as a weighted average of the results for those assets.

2. **Country Revenue Exposure:** Where only one asset is available for a given company, the company-level exposure scores and financial impact will be calculated based on the results for that asset and a weighted average of country-level physical risk metrics (weighted by country revenue share).

3. **Country Average:** Where only one asset is available for a given company and no geographic revenue data is available, company-level exposure scores and financial impact will be calculated based on the country average physical risk for the company headquarters country.

Coming Soon

Upcoming content enhancements via our API solutions:

Token-Based Authentication for S&P Capital IQ API

We will introduce token-based authentication for the S&P Capital IQ API, offering enhanced security for API users. New client libraries will be available to support this feature. Please look for more detailed communication to come regarding this change.

Usage Service

We will release Usage Services on our S&P Capital IQ API in June. Usage service provides usage reports for our endpoint consumers.

Kensho Link on S&P Capital IQ API

We plan to add a new mnemonic that allows you to search for a company name and map it to entity-level identifiers (Company ID / Institution ID). Kensho Link's advanced machine-learning technology powers this new feature. New client libraries will be available to support this enhancement.

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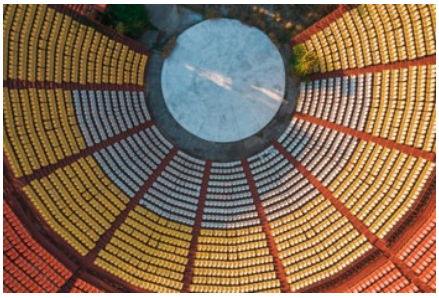
Python SDK for API Integration

The Python Software Development Kit provides flexibility and ease of development for integrating the S&P Capital IQ API into your Python environment.

S&P Global Marketplace

Showcase Visualizations: Global New Vehicle Registrations Data



Showcase Visualizations demonstrate the value and breadth of data in a dataset by illustrating a sample use case. Showcase visualizations are available at S&P Global Marketplace to anyone visiting the platform.

The Global New Vehicle Registrations dataset provides new vehicle registration information on cars and light commercial vehicles from sources in 150+ countries worldwide. Leverage these registration counts for demand and market share monitoring, validation of company targets, tracking the pace of transition to electric vehicles, macroeconomic analysis, and more.

This showcase visualization can be used to analyze vehicle sales worldwide by comparing total sales volume by company and model, as well as the top 5 models for auto companies by year, region, make, retail price (MSRP), and more. This will give you near-real-time insight into global vehicle sales and a better understanding of the overall automotive market performance.

View the data visualization >

Workbench Notebook of the Month

This month we added new Starter and Theme Notebooks to the S&P Capital IQ Workbench, our easy-to-use notebook environment accessible via the web.

We added two new starter notebooks for the **Global New Vehicle Registrations** dataset. This dataset from S&P Global Mobility enables automakers to analyze automobile markets and drive accurate monthly sales forecasts for a wide variety of global markets.

- Model Starter Guide contains historical actuals and short-term predictions on global automotive demand volumes organized by **model**.
- Make Starter Guide contains historical actuals and short-term predictions on global automotive demand volumes organized by **make**. This is an aggregated version of the information in the model-level package.

We also added the Nikkei News Starter Guide. Nikkei News provides Asia-Pacific news coverage for a global audience in a machine-readable format. This dataset has comprehensive coverage of politics, the economy, markets, and trends throughout the entire Asia-Pacific market. The Nikkei, Japan's largest business newspaper, and Nikkei Asia, news and insights

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focused on Asia-Pacific's most influential companies provide full articles and metadata for Natural Language Processing (NLP) analysis.

This dataset includes:

- English-translated and native English content covering over 4,000 companies
- Metadata for company, headline, date, article body, and select themes such as Sustainability, Artificial Intelligence, Digitalization and Industrial Revolution

Research, Blogs, Events, & Webinars

Mastering Data Integration: The Importance of Building a Strong Security and Entity Master File

In this webinar, discover how our cross-reference services, built from the ground up and meticulously developed and refined over 30 years, offer the ultimate solution for efficiently managing complex datasets.

Replays from the Databricks Data + AI Summit

Didn't have the chance to catch us at the 2024 Databricks Data + AI Summit? Watch these replays of our conference sessions:

Powering S&P Capital IQ Data Apps with Databricks and Plotly

Onik Kurktchian, Head of S&P Global Capital IQ Workbench, showcased S&P Capital IQ Data Applications, a visual-based application suite powered by Databricks and @Plotly that encourages users to analyze deep data based on specific workflows.

Watch this replay to learn about the design, development, and deployment of our application suite.

Accelerating Financial Innovation: Unlock Insights with Databricks Marketplace

John Schirripa, Head of Distribution Platforms for S&P Global Market Intelligence, and other experts joined a panel discussion to share how integrating with the Databricks Data Intelligence Platform has not only streamlined data workflows but also unlocked innovative analytics and AI capabilities, driving significant business value.

Watch this replay to learn how to overcome common challenges in data sharing, such as data privacy, security concerns, and interoperability issues.

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Workbench Workshop

Unified Company Mapping: Leveraging Cross Reference Services and Kensho Link
Date: Wednesday, July 10, 2024
Time: 10:00 am - 11:00 am EDT
Duration: 1 hour

In today´s ever-growing data landscape, organizations are continually integrating multiple data sources and facing challenges in ensuring the accuracy of their centralized entity master. This workshop is designed to address the difficulties encountered when mapping and maintaining the company universe to the correct internal or external identifiers. Join us for a live session in which we will provide a streamlined S&P Global Marketplace Blueprint using automated entity recognition and a machine learning entity recognition solution, built by Kensho, AI-innovation arm of S&P Global.

During the workshop, we will demonstrate how the Business Entity Cross Reference Service (BECRS) dataset can automate the initial linking process and manage unmapped companies using Kensho Link, an advanced machine learning model. The model processes company names and matches them to unique entity-level identifiers with a high confidence score, ensuring comprehensive coverage and accuracy. Additionally, each entity within the universe will be rolled up to its ultimate parent, offering a clear and concise view of company hierarchies and relationships.

Register now to reserve your spot >

Client Support and Sales Inquiries

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File delivery support is available 24/7/365.

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APAC	+852.2912.3060

For additional contact numbers, please go to support.marketplace.spglobal.com.

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