



## Marketplace Data & Solutions Communiqué

July 31, 2024

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## Spotlight

### As-Reported Financials

On July 8, 2024, we released As-Reported Financials on Xpressfeed and Snowflake.

Our As-Reported Financials dataset enables you to obtain financial data exactly as it was presented by companies in their financial reports for North American and Global companies, while gaining deeper insight from the details collected from the footnotes.



This dataset enables you to:

- Replicate the income statement, balance sheet, and cash flow statement as the company reported as well as how those items are classified within the S&P Capital IQ data model.
- View additional detail collected from the footnotes, such as restructuring charges, included within the reported main statement items.
- Understand the adjustments made to arrive at S&P Capital IQ standardized items through the Transparency functionality.
- Dynamically create links back to the S&P Capital IQ Pro Document Viewer to audit values.

As-Reported Financials brings efficiency and transparency to your financial data workflows, helps you meet regulatory requirements and evaluate market impact and stock price change drivers.

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## Headcount Analytics Data

The [Headcount Analytics](#) dataset provides monthly data for 3.8M+ entities and 220M+ employees worldwide, with history going back to 2010. Aggregated from a variety of sources and online platforms via a third party, the data is mapped to our company identifiers to generate detailed insights such as hiring / layoff trends, tenure, hierarchy, and churn, all categorized by role and function. Providing greater detail into global employee distribution and dynamics, Headcount Analytics is an invaluable resource for monitoring company growth, especially for private companies with undisclosed financials. It can aid in M&A evaluations and highlight corporate growth indicators, company retention, and talent flow.

Headcount Analytics allows users to:

- Predict company performance
- Analyze M&A targets
- Review employee retention and talent flow

[Read More](#)

## Xpressfeed <sup>™</sup> and Snowflake <sup>®</sup>

## Recent Enhancements

## MMD Insurance Data®

We released Insurance data for our [Money Market Directories](#) offering on Xpressfeed and Snowflake. The new package contains data for Insurance firms including entity, affiliates, contact, and key developments data on the company.



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## Switzerland Services PMI® Data Now Available

Switzerland Services [PMI](#) data, produced by UBS and prochure.ch, is now available for Total Global PMI Clients alongside the existing Switzerland Manufacturing PMI data from the same source. This data complements the wider set of PMI surveys produced by S&P Global for over 45 economies worldwide, providing a timely, rounded view on economic and sector conditions each month in advance of official data.

## Light Vehicle Production Forecast with Propulsion Type

We released an enhancement of the Light Vehicle Production Forecast dataset in our Light Vehicle Forecast offering in Xpressfeed. The enhancement includes a new package, which provides light vehicle production data and forecasts by propulsion type.

[Read More](#)

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## Sustainable1

### Trucost Environmental: Private Companies Data Coverage Expanded

As part of S&P Global's continuing efforts to enhance our product offering, we expanded our coverage to approximately 4.5 million companies. As of June 29, 2024, we added 1.3 million companies and updated data on approximately 3.2 million existing companies within the [Trucost Environmental: Private Companies](#) packages in Xpressfeed.

## Trucost Carbon Earnings at Risk Quarterly Updates

As part of the quarterly updates for [Trucost Carbon Earnings at Risk](#), we added data for FY 2023 for approximately 3,831 companies. This update will also include additional company coverage for approximately 218 new companies.

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### Trucost EU Sustainable Investment Updates

As part of the Q2 quarterly updates to our [Trucost Sustainable Investment Data](#) package, we updated the data for approximately 20K company profiles and added data for approximately 273 company profiles.

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## Coming Soon

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



#### Alpha Signals Specialty Models in Snowflake

Seven specialty datasets from the Alpha Signals library will be available in Snowflake with daily updates and history. These models are built from proprietary S&P Global datasets and provide customers with a unique advantage in building stock selection models for alpha or risk management solutions.

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#### Non-English Language Filings to Be Available in Machine Readable Filings

We will be adding a separate non-English filings package to our Machine Readable Filings offering. The addition of non-English filings expands the coverage of Machine Readable Filings to a global universe of corporates publishing Annual, Quarterly, and Interim reports only in their native language. As with the English language filing types, the non-English filings provide:

- basic metadata in the filing
  - raw text in the filing broken down into the sections identified in the document
- 

## Announcements

### Enterprise Data eXchange (EDX) Platform Sunset

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 Xpressfeed™ 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

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## **Action Required! Compustat Security Identifier Package Migration**

CUSIP Global Services (CGS) have informed us that our delivery of CUSIP identifier data (assigned by CGS) through the Compustat Core packages no longer complies with their vendor requirements. In order to comply with CGS's requirements, and to simplify how we deliver this data, we will modify the way all third-party identifiers (including CUSIP and SEDOL) are delivered and integrated within Compustat Core.

Access to CUSIP data will not be immediately impacted as part of this migration. However, pursuant to our agreement with CGS, clients who do not have a valid CUSIP license may lose access to the packages containing the CUSIP identifiers in the future. ACTION IS REQUIRED to migrate to these new packages and to continue receiving this data. If your organization does not have a current CUSIP license, you will receive a formal Form of Notice Letter.

If you have a valid license with CGS for CUSIP, your access to CUSIP will not be impacted. Clients currently receiving SEDOL data will continue to be entitled to receive SEDOL data via the new packages.

[Read More](#)

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# API

## Recent Enhancements

### New Usage Service for S&P Capital IQ API

We now offer the S&P Capital IQ API usage service in a new endpoint: <https://api-ciq.marketintelligence.spglobal.com/gdsapi/rest/v3/usageservice.json>.

**Note:** the URL works from an API platform only.

The usage service enables you to extract usage statistics for a given day or historical date range. In addition, the usage service provides details about hourly, daily and monthly throttling limits applied to your account. This endpoint is provided to all active API users. See the [S&P Capital IQ API Developer's Guide](#) for more information.



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### Python SDK Now Available for the S&P Capital IQ API

In July, we released a new [Python SDK](#) for S&P Capital IQ API. The S&P Capital IQ API Python Library makes use of the language's capabilities in data processing and scripting to offer comprehensive functionalities for authentication, retrieval of detailed point-in-time and historical financial data (such as income statements, balance sheets, and cash flow statements), and providing access to time-series and historical market data (including stock prices, trading volumes, market indices, and other critical market information essential for analysis and decision-making).

[Read More](#)

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### Cross Reference Services

#### New BIC Code Mnemonic in BECRS Cross Reference Data (S&P Capital IQ API)

On July 31, 2024, we enhanced BECRS support for [BIC Code](#) with a new mnemonic in our BECRS Cross Reference dataset.

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### Additional Identifier Types in LEI ID in BECRS (S&P Capital IQ API)

Effective July 31, 2024, we enabled the below list of LEI identifier types for BECRS mnemonics in our Cross Reference data. The new LEI identifier types are supported as input and output parameters.

21108 LEI - InfoCert - Italy  
21111 LEI - Nasdaq CSD - Nordic  
21110 LEI - Xerius - Belgium  
21109 LEI - Qatar Credit Bureau - Qatar  
21341 LEI - KELER Ltd. - Hungary  
21342 LEI - Tunisie Clearing - Tunisia  
21434 LEI - NordLEI - Sweden  
21776 LEI - Unilei ApS - Denmark  
20484 LEI - Depozitarul Central - Romania

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## **Sustainable1**

### **Trucost Environmental: Private Companies Data Coverage Expanded**

As part of S&P Global's continuing efforts to enhance our product offering we expanded our coverage to approximately 4.5 million companies. As of June 29, 2024, we added 1.3 million companies and updated data on approximately 3.2 million existing companies within the [Trucost Environmental: Private Companies](#) data in XpressAPI.

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### **Trucost Environmental: Paris Alignment Data Coverage Enhancements**

As part of the quarterly updates to our [Trucost Paris Alignment](#) package, on June 29th, 2024 we are planning to add data for the FY 2022 for approximately 3K companies. We are also updating the data for approximately 17K company profiles in XpressAPI.

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## **New Kensho Link Service Available on the S&P Capital IQ API**

On July 15, 2024, we introduced the new Kensho Link service for the S&P Capital IQ API. This service enables you to map company names to their identifiers (companyId / institutionId) and obtain reference data such as city, state and URL using the KL\_COMPANY\_ID\_NAME\_QUICK\_MATCH mnemonic.

[Read More](#)

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## Token-based Authentication Now Available on S&P Capital IQ API

In July, we made token-based authentication available on our S&P Capital IQ API. Our new [token-based authentication service](#) for the S&P Capital IQ API offers enhanced security for API users. Initially, token-based authentication will be available in parallel with basic authentication. Over the coming months, basic authentication will be retired, and you will need to adopt security tokens for continued seamless access to our S&P Capital IQ API.

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## New .NET and Open JDK Client Libraries and Test SDKs on S&P Capital IQ API

In July 2024, we made new .NET and Open JDK Client Libraries as well as Test SDKs available for the S&P Capital IQ API. The latest client libraries and Test SDKs are available on the Marketplace Support Center (login credentials are required).

Using the client libraries or Test SDKs, you can build library applications including our new token-based authentication and Kensho Link service.

### 5 NEW LIBRARIES

#### **.NET CORE**

- [.NET Core 6.0.0 v3.0.0 \(win-arm64\)](#)
- [.NET Core 6.0.0 v3.0.0 \(win-x64\)](#)

#### **.NET FRAMEWORK**

- [.NET Framework 4.8 v3.0.0](#)

#### **Open JDK**

- [Open JDK 11 v3.0.0](#)
- [Open JDK 1.8 v3.0.0](#)

#### Test SDKS

##### **.NET CORE**

- [.NET Core 6.0.0 v3.0.0](#)
- [.NET Framework 4.8 v3.0.0](#)

##### **Open JDK**

- [Open JDK 1.8 and Open JDK 11 v3.0.0](#)

For more information on using our token-based authentication and Kensho Link service, see the [S&P Capital IQ API Developers Guide](#).



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## Research API Token-Based Authentication in New .NET and Open JDK Client Libraries and Test SDKs

In July 2024, we made new .NET Core and Framework as well as Open JDK Client Libraries and Test SDKs available that support token-based authentication on our Research API. The latest client libraries and Test SDKs are located on the Marketplace Support Center website (login credentials are required).

The Research API is an on-demand service to search our extensive library of S&P Global investment research content. You can search various entity types, such as company, index, watch list, comp set, or portfolio for content from specific contributors using keywords to help refine your results.

Token-based authentication for the Research API offers enhanced security for API users. Initially, token-based authentication will be available in parallel with basic authentication. Over the coming months, basic authentication will be retired, and you will need to adopt security tokens for continued seamless access to our Research API.

### 4 NEW LIBRARIES

#### .NET CORE

- [.NET Core 6.0.0 v3.0.0 \(win-arm64\)](#)
- [.NET Core 6.0.0 v3.0.0 \(win-x64\)](#)

#### .NET FRAMEWORK

- [.NET Framework 4.8 v3.0.0](#)

#### Open JDK

- [Open JDK 11 v3.0.0](#)

#### Test SDKs

##### .NET CORE

- [.NET Core 6.0.0 v3.0.0](#)
- [.NET 4.8 v3.0.0](#)

##### Open JDK

- [Java v3.0.0](#)

For questions or concerns, please contact us at [support.api.mi@spglobal.com](mailto:support.api.mi@spglobal.com).

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**Action Required!** XpressAPI Token-Based Authentication: Removal of GET Method

On July 19, 2024, we removed the GET method support for the Authentication service from our Swagger Documentation site and the XpressAPIDeveloper's guide.

As part of our Security review practices, we have identified the GET method as a less secure way of establishing an API authentication connection. As a result, we are expiring the GET method for XpressAPI on September 30th, 2024. You are required to switch to the POST method to obtain access tokens using our XpressAPI Authentication service. See our [XpressAPI Developer's Guide](#) for more information about the POST method of token-based authentication as well as sample requests.

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## Coming Soon

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



#### ChartSeries API

The Chartseries API service will allow you to explore on-demand data from S&P Global Market Intelligence and integrate that data within your charting and visualization tools. Using Chartseries REST endpoints, you will be able to programmatically query specific data points for various chart types like Fundamentals, Market Data, Estimates Consensus, Key Developments, and Transactions.

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#### Filings Documents Format Converter

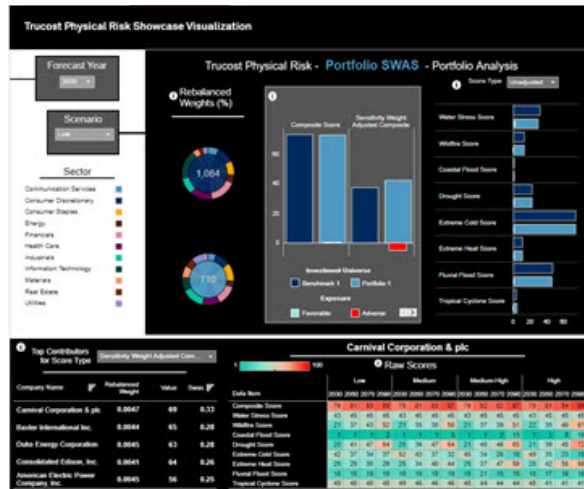
We plan to offer a new document format conversion filter in our Physical Documents Filings Service on the S&P Capital IQ API. You will be able to convert the original file format to the document format of your choice.

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## S&P Global Marketplace

### Showcase Visualization: Physical Risk

Showcase Visualizations demonstrate the value and breadth of data in a dataset by illustrating a sample use case. This month's visualization highlights the Trucost [Physical Risk](#) dataset. Physical risk scores reflect exposure to climate hazards across time for various scenarios. Financial impact metrics help you evaluate projected financial costs/losses due to changing climate hazard exposure for a given asset.



## Workbench Notebook of the Month

This month we feature two starter guides for [S&P Capital IQ Workbench](#), our easy-to-use notebook environment that allows you to test and experiment with datasets from S&P Global and curated third-party providers.

[MediaCensus Starter Guide](#) allows users to discover the U.S. residential broadband and video landscape at a granular market level.

[Datacenter KnowledgeBase Starter Guide](#) This dataset from 451 Research provides datacenter location, services, and utilization data to support cloud services, ESG, energy, media, and critical infrastructure analysis.



## Platform Highlights

### Introducing Three New Capital IQ Applications

Introducing three new Capital IQ Applications that empower you to analyze deep data based on specific workflows:

[Transcripts Trending Topics](#) - Discover trending key words and insights across the current S&P 500 earnings call transcripts universe

[Topical Key Phrases](#) - Identify the most significant topics in each earnings call transcript based on semantically and contextually similar key-phrase occurrences within the underlying text.

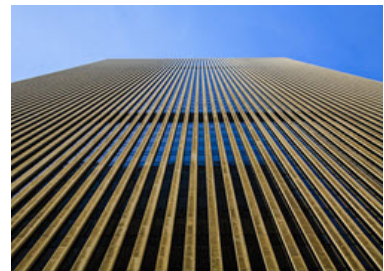
[News Sentiment](#) - Explore specific company news, understand the overall market sentiment, or identify which news topics are driving sentiment.

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## Research, Blogs, Events, & Webinars

### Case Study: An Insurance Company Uses S&P Capital IQ Workbench to Uncover Insights from SEC Filings

An emerging Insurance company, known for its data-driven risk analysis saw an opportunity to use cybersecurity disclosures in 8-K filings to better understand potential claims and price risks for new policies. The underwriting team sought machine-readable SEC filings to save time on data preparation and to test the hypothesis that these filings could provide insights into cybersecurity risks.



Interested in learning more about the benefits of their journey?

[Click here to download the full case study >](#)

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### Unified Company Mapping: Leveraging Cross Reference Services and Kensho Link

In today's ever-growing data landscape, organizations are continually integrating multiple data sources. They face the challenge of mapping and maintaining their company universe to the correct internal or external identifiers.

This S&P Global Marketplace Blueprint offers an elegant solution to these challenges. Our 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.

[Watch the workshop replay >](#)

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## Client Support and Sales Inquiries

Email: <a href="mailto:support.datafeed.mi@spglobal.com">support.datafeed.mi@spglobal.com</a> <a href="mailto:support.api.mi@spglobal.com">support.api.mi@spglobal.com</a>	
<i>File delivery support is available 24/7/365.</i>	
Location	Phone
Americas	+1.800.523.4534
EMEA	+44.20.7176.8580
APAC	+852.2912.3060
For additional contact numbers, please go to <a href="https://support.marketplace.spglobal.com">support.marketplace.spglobal.com</a> .	

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