



## Marketplace Data & Solutions Communiqué

October 1, 2024

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## Spotlight

### Data Management Insight Award 2024

We are honored to have received the 2024 Data Management Insight Award for the [Best AI-Based Solution](#) for Data Discovery - S&P Global Marketplace Generative AI Search. These awards are uniquely designed to recognize established solution vendors and innovative newcomers in more than 30 categories of data management solutions and services.



## Securities Finance Short Interest Buyside Analytics Now Available

As part of our ongoing commitment to enhancing the Securities Finance Buyside product offering, we are excited to announce the release of the brand-new [Securities Finance Short Interest Buyside Analytics](#) dataset, available via Snowflake and Xpressfeed™. The newly expanded Buyside Analytics data is our flagship short interest offering, giving users access to market-leading analytics across short seller demand, supply, and borrow costs for both Global Equities and Fixed Income. Spanning \$40 trillion of assets in securities lending programs, our dataset is sourced directly from industry participants, including Prime Brokers, Custodian Banks, Beneficial Owners, and Hedge Funds.

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## Xpressfeed™ and Snowflake®

### Alpha Signals Specialty Models

This month, we released [Alpha Signals Specialty Models](#), a comprehensive library of stock selection signals built from proprietary datasets and data partnerships with data starting as early as 1987.



This data offering on Snowflake provides hundreds of pre-calculated factors, including:

- financial ratios
- valuation metric
- price and momentum statistics
- analyst expectations

The data leverages Compustat and S&P Capital IQ Fundamental datasets among many other data sources, to provide quant signals on fundamental, industry and alternative data themes. Factors are constructed historically using point-in-time data, are updated on a daily, go-forward basis and compiled into various models.

Using Alpha Signals enables you to focus on researching alpha-producing factors and portfolio construction instead of performing raw ratio calculations.

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## **S&P Dow Jones BMI Universe Expansion**

This month, we plan to release [new V2](#) versions of packages to expand our universe coverage for the limited S&P Dow Jones BMI Index Data available in Xpressfeed since 2016.

The S&P Global Broad Market Index (BMI) is the only global index suite with a transparent, modular structure that has been fully float-adjusted since 1989. This comprehensive, rules-based index series employs a transparent and consistent methodology across all countries and includes more than 14,000 stocks from developed and emerging markets.

These new data packages will require you to either:

- Delete V1 packages and load the new V2 packages into your database

OR

- Load the V2 packages into a new database instance
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## **New CNPJ Klooks Brazil ID and Korean Corporate ID packages in Business Entity Cross Reference Service (BECRS)**

Effective October 1, 2024, we added [two new packages](#) to the Business Entity Cross Reference Service (BECRS) dataset for the CNPJ Klooks Brazil ID and Korean Corporate ID. The CNPJ Klooks Brazil taxpayer identification number is used for businesses formed in Brazil or foreign companies that wish to invest or own assets in Brazil. The Korean Corporate ID is an identifier assigned to companies registered in South Korea by the Registration Office.

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## **SNL Fundamentals FIG Corporate Field Enhancements**

As part of S&P Global's continuing efforts to enhance our **SNL Fundamentals** offering, on September 30th, 2024, we added [184 new items](#) and 30 million additional rows of data.

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## SNL Corporate Additions

As part of S&P Global's continuing efforts to enhance our SNL Corporate Data offering, on September 23, 2024 we added 21 new items to the snlCorpTextData and snlCorpData tables/views. We also added 1 million new institutions.

dataitemid	DataItemName
131160	Company Name, Short
131165	Exchange
131178	Country / Region Name
131218	Month of Fiscal Year End
131228	Securities Filing Agency
131267	NERC Region Code
139474	Trading Symbol Exchange
218459	Country/Region of Incorporation Name
218460	Global Region
226069	Company Description
227304	Ultimate Parent Institution Key
227518	Tax Identification Number
232862	SNL Global Subregion
246263	Number of Global Branches
247722	ECB MFI Identifier
249008	SIFI (Systemically Important Finl Instn)
255389	Ownership Status
260601	European Union Member
260602	Eurozone Member
260603	OECD Member
262392	Dividend Frequency

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## Sustainable1

### Net Zero Commitments Tracker Quarterly Update

The quarterly Net Zero Commitments Tracker data update took place on **September 3<sup>rd</sup>, 2024**. We increased our coverage from ~2,700 to ~3,600 companies and updated all existing companies based on the latest source data.

Additionally, we updated the following values within the targetStatus column on the tcNZPeriodTarget table:

- "At Risk" was updated to "Unlikely to meet target"
- "On Track" was updated to "Likely to meet target"

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## Trucost Environmental Scope 3 AsReported Items Added

As part of S&P Global's continuing efforts to enhance our **Trucost Environmental** product offering, we added 16 new data items to **Trucost Environmental & Trucost Private Environmental packages**. Click [here](#) for a list of new data items.

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## Physical Risk Asset Data Expansion

As part of the data updates to our Physical Risk dataset, starting September 10, 2024, we increased asset coverage by approximately 2M to approximately 4M. There was no change to the company coverage.

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## Light Motor Vehicle E-Propulsion Forecast Now Available

We are excited to share that the [Light Vehicle E-Propulsion Forecast](#) from S&P Global Mobility is now available via Xpressfeed™ and Snowflake. This product is an addition to the Light Vehicle Forecast family. It provides forecasted and actual specification and configuration details on the powertrain, including engine, transmission and e-propulsion (e.g., batteries and motors in battery electric and hybrid vehicles) for produced vehicles.

This dataset provides additional details around vehicles' battery capacity, power output, electrified drivetrain type, and other parameters of growing importance in the energy transition.

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## Moody's Ratings GISFPF, PF Organization Baseline

Effective September 10, 2024, we released new Moody's Baseline [organization-level data](#) available on Snowflake. These new packages are comprised of the Global Issuer Structured Finance Public Finance

(GISFPF) sector (with and without CUSIPs) and the Public Finance (PF) sector (with and without CUSIPs).

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## **CreditPro Defaults and Ratings Two New No GICS Issuer and Issue Packages**

Effective September 20, 2024, we added CreditPro Defaults and Ratings [No GICS data](#) for the Issuer and Issue Default packages via Xpressfeed and Snowflake.

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## **Company Ticker Symbol Now Available in RatingsXpress v4**

On October 1, 2024, the [company ticker symbol](#) became available to help you identify companies rated by S&P Global Ratings by their company ticker symbol. Two new identifier types have been added to the RXIdentifierReference packages. Data will automatically flow into the spRXObjectIdentifierData and spRXObjectIdentifierType tables. This enhancement will be offered on Xpressfeed and Snowflake.

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## **Expanded Coverage of Security Identifiers in RatingsXpress v4**

On October 1, 2024, we [expanded coverage of existing security-level global identifiers](#) such as CUSIP, CINS, and ISIN (International Securities Identification Number) by auto-populating pre-linked additional market identifiers for cases with at least one existing identifier match in the RXSPGRatings packages and S&P Global Market Intelligence databases.

A new package has been added to the RatingsXpress v4 CUSIP offering to make 600,000 USPF ISINs available for actively rated securities and 200,000 USPF ISINs for previously rated securities. We also provide additional CUSIPs, CINS, and ISINs for 1,200 previously rated Global Issuers (i.e., Corp, Utilities, Insurance, FI, Sovereign) and Structured Finance securities.

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## **Coming Soon**

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

**AutoCreditInsight on Snowflake**



We plan to enhance our S&P Global Mobility data suite offering with the addition of AutoCreditInsight™ data on Snowflake. AutoCreditInsight combines S&P Global's Mobility US personal registration database with TransUnion's credit files to deliver industry-leading automotive insights.

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#### **Credit Default Swaps Pricing on Snowflake**

We plan to add the Credit Default Swaps (CDS) Pricing dataset to Snowflake. Originating from IHS Markit, this dataset provides independent pricing and liquidity metrics on CDS single names, indices, tranches, options and sector curves, making it the most extensive source of CDS data available.

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## **Announcements**

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

CUSIP Global Services (CGS) has informed us that our delivery of CUSIP identifier data (assigned by CGS) through the Compustat Core packages no longer complies with their vendor requirements. To comply with CGS's requirements and simplify how we deliver this data, we will modify how 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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## Better Market Derived Signals and New Credit Default Swaps Content

We will be introducing our new generation of RatingsXpress: Credit Default Swap based Market Derived Signals on Xpressfeed and Snowflake. The underlying data source will change from CMA to IHS Markit/S&P Global data.

The underlying change will not impact the data structure, as the schema and field names will remain the same. However, the CDS based MDS values will change. For more information, please refer to the [CDS Single Name Pricing Data Methodology](#). Additional communications regarding migration dates and support options will be forthcoming.

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## API



# Recent Enhancements

## Sustainable1



### Trucost Environmental Scope 3 AsReported Items Added

As part of S&P Global's continuing efforts to enhance our **Trucost Environmental** product offering, we added 16 new data items to **Trucost Environmental & Trucost Private Environmental packages**. Click [here](#) for a list of new data items.

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### RatingsXpress: Research - Enhanced Article Search by Date (XpressAPI and XpressAPI Drive)

The RatingsXpress: Research [Article List](#) endpoint on XpressAPI has been enhanced to provide a complete history of all active articles when searching for articles using only the 'fromDate' and 'toDate' fields, without any market identifiers to narrow down relevancy. This list can then be refined using filters such as article type, article sub-type, sector, subsector, and region. Previously, users were only allowed to view the last 30 days' worth of articles when searching for articles using only the 'fromDate' and 'toDate' fields. This capability is also available on XpressAPI Drive. You can request articles for a one-year time frame per request.

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## Coming Soon

### Upcoming content enhancements via our API solutions:



#### Physical Risk Asset Data Expansion (XpressAPI)

As part of the data updates to our Physical Risk dataset, we plan to increase our asset coverage by approximately 2M to approximately 4M. There will be no change to the company coverage.

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## SNL FIG Global Banking Fields Additions (XpressAPI)

In our SNL Fundamentals offering, we plan to add 184 new items and 30 million additional records.

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## Announcements

### Action Required! Important Security Enhancement and New Error Code (S&P Capital IQ API)

In order to enhance our API security, we have added a new **Auto-Lock Feature** to safeguard against unauthorized access. After five consecutive failed login attempts with incorrect credentials, your account will be automatically locked for a period of 30 minutes. This measure aims to prevent misuse and enhance overall security.



As part of this feature, we have added a new error code **423 - Account Locked** which specifies that the account has been temporarily locked due to multiple failed login attempts.

In order to accommodate this change, we recommend you adjust the error handling at your end.

**These changes will be introduced on the 18<sup>th</sup> of October, 2024.**

If you have any questions or concerns, please reach out to APISupport: [support.api.mi@spglobal.com](mailto:support.api.mi@spglobal.com)

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## API Drive Migration to New SFTP File Delivery Platform

As part of our continuous efforts to improve our delivery solutions, we will soon kick off the process of sunsetting the Enterprise Data eXchange (EDX) platform. EDX file delivery will be replaced by a new cloud-based SFTP file delivery platform offering improved performance, security, and reliability.

The new SFTP platform will replace EDX delivery of custom portfolio data through API Drive and Xpress API Drive solutions. Please look for additional communications to follow on migration dates and support options to help ensure a smooth transition to the new platform.

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## Better Market Derived Signals and New Credit Default Swaps Content

We will be introducing our new generation of RatingsXpress: Credit Default Swap based Market Derived Signals delivered in the S&P Capital IQ API. The underlying data source will change from CMA to IHS Markit/S&P Global data.

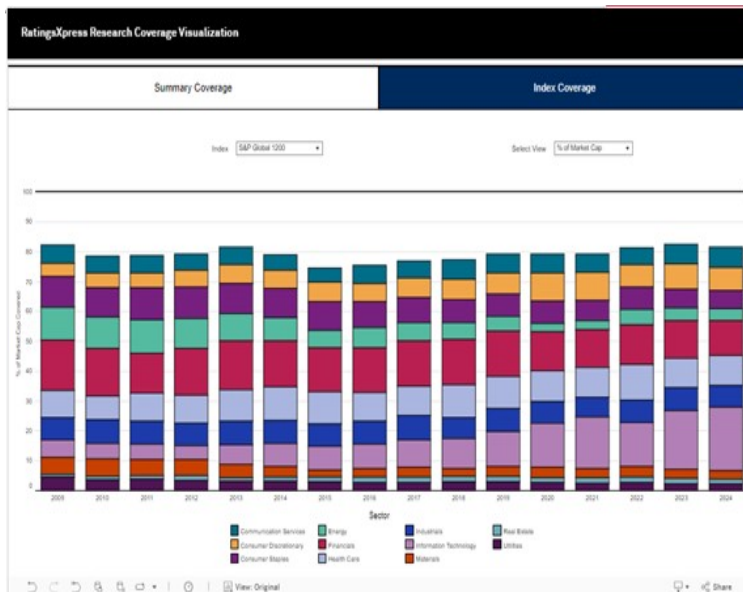
The underlying change will not impact the data structure, as the schema and field names will remain the same. However, the CDS based MDS values will change. For more information, please refer to the [CDS Single Name Pricing Data Methodology](#). Additional communications regarding migration dates and support options will be forthcoming.

## S&P Global Marketplace

### Coverage Visualization for RatingsXpress: Research

The RatingsXpress: Research dataset provides research reports published by S&P Global Ratings. View coverage at a glance by article type, company type, country, region, and sector as well as coverage by major index constituents with this new [coverage visualization](#).





## Blueprint of the Month: Derivatives Data and Valuations

Learn how to leverage multiple datasets and solutions to support your derivative needs with our new [Marketplace Blueprint](#) featuring Derivatives Data and Valuations. Includes support for price discovery, risk assessment, independent valuation, margin calculations, and more.

## Workbench Notebook of the Month

[S&P Capital IQ Workbench](#), our easy-to-use notebook environment, allows you to test and experiment with datasets from S&P Global and curated third-party providers. We are continually adding new datasets for you to explore. This month, we feature two new notebooks:

[Headcount Analytics Starter Guide Notebook](#) leverages a combination of S&P Capital IQ Financials, Transactions data and other key sources to provide a comprehensive view of global employee distribution and dynamics. This dataset provides a valuable way to analyze the growth in ratio of employees and aggregated employee details by location, level, and role for over 220 million employees globally.



[Physical Risk: Municipal Starter Guide](#) offers insights into the physical risk exposures of general obligation municipal debt issuers in the U.S., incorporating economic and demographic data. It allows municipal market participants to assess current and future climate hazard exposures across nine climate risks and four scenarios, covering over 3,000 issuers. This dataset includes issuer-level physical risk scores, GDP-weighted hazard frequencies, and advanced climate modeling, providing a comprehensive view of the potential impacts of climate change on regional economic productivity and population exposure over eight decades.

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## Research, Blogs, Events, & Webinars

### Case Study: Deep Data Helps a Freight Forwarder Accelerate Its Approach to Lead Generation

Today's volatile and highly competitive shipping environment is requiring companies to take a closer look at their sales processes. See how a U.S. based freight-forwarding company leveraged S&P Global's Company-Level Linking Blueprint and Panjiva Supply Chain Intelligence dataset to modernize their lead generation workflow, transforming their outdated, manual sales approach into an automated, data-driven strategy. Read our latest [case study](#) to learn how they gained deeper insights into trade flows and uncovered new market opportunities.



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### Upcoming Webinar: Navigating the Storm: Innovating Asset Management in Volatile Markets

Thursday, October 10, 2024 | 11:00 a.m. – 11:45 a.m. ET | 4:00 p.m. – 4:45 p.m. GMT

Join our upcoming webinar to explore how asset managers can navigate today's challenging landscape, characterized by market volatility, declining assets under management, and increased client demands. Learn about innovative strategies and advanced tools essential for staying competitive.

In this session, we will delve into key insights from Visible Alpha's white paper, "The Race to Stay Ahead: How Leading Asset Managers are Modernizing the Investment Research Process." Discover practical

solutions tailored for fundamental active managers to modernize research operations and enhance their investment research processes and product models.

Hear directly from experts at Visible Alpha, S&P Global Market Intelligence, and Snowflake about the technology solutions available now for asset managers to leverage.

[Register here >](#)

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## **Upcoming Webinar: 2024 Trends in Data Visualization & Analytics**

**Thursday, October 17, 2024 | 11:00 a.m. – 12 p.m. ET | 4:00 p.m. – 5 p.m. GMT**

Join us as we dive into the evolving landscape of data visualization and analytics, uncovering how industry leaders are leveraging these changes to fuel innovation, streamline efficiency, and sharpen their competitive edge. As data becomes the new currency, mastering its visualization and analysis has become essential for businesses aiming to stay ahead. No longer just a tool for experts, data visualization and analytics have evolved into a strategic necessity, with organizations leveraging it to unlock the hidden value in massive datasets. What was once limited to static charts and reports has now expanded into dynamic, interactive platforms, capable of revealing patterns, predicting trends, and empowering real-time decision-making.

As innovation accelerates, businesses are rethinking how they visualize, analyze, and share data across their teams to remain agile and competitive. Key topics of discussion will include:

- A deep dive into the top trends reshaping data visualization and analytics in 2024
- Recent advancements in S&P Capital IQ Pro tailored to meet evolving market demands
- The latest charting innovations, and how ChartIQ is keeping pace with today's technology and client preferences

[Register here >](#)

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## **Client Support and Sales Inquiries**

Email: [support.datafeed.mi@spglobal.com](mailto:support.datafeed.mi@spglobal.com)

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*File delivery support is available 24/7/365.*

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For additional contact numbers, please go to <a href="https://support.marketplace.spglobal.com">support.marketplace.spglobal.com</a> .	

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