SCREENER APP

Why should I use the app?

The **Screener app** in Refinitiv® Workspace is a powerful, flexible and intuitive idea-generation tool that enables you to view a chosen universe and identify a group of securities that meet your investment objectives. It gives you a suite of sophisticated screening tools that enable you to select a universe of companies, set filters, sort, group and aggregate data, using your own fully customisable reports for deep and meaningful analysis.

Key features

– Select your preferred universe to screen
– Create simple and sophisticated filters and ranks on a broad range of factors to identify new investment opportunities
– Now you can screen on environmental, social and governance (ESG) data. Examples:
    – Ethical/negative screening: Avoid companies involved in activities such as the manufacture of armaments
    – Positive/best-in-class screening: Identify companies that demonstrate an active, positive contribution to sustainable development and lead their peer group in respect of environmental and social performance
– Create lists of securities that you can use in other apps such as the Monitor, Alerts or Watchlist pulse apps
– Quickly export your screens to Microsoft® Excel® and refresh data without leaving the spreadsheet

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Top tips on how to use the app

– To access Screener, click on **Search Tools** and select **Screener** from the **auto-suggest** options

– Select a screen universe: public companies, private companies, an index, a portfolio or a watch list

– There are three ways to add filters:

  – **Quick Filters** let you select the most popular filters with a mouse click

  – Type a keyword in the filter **Search box** and select an entry from auto-suggest

 – **Launch Field Picker** to browse the entire filter library
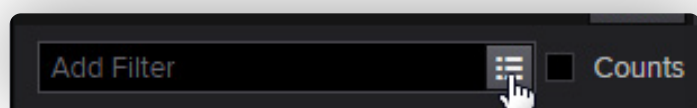
– Add as many filters as required and combine them either with AND or with OR

– Save your screens for future use and share them with other users if required

– Create customised reports to sort and rank securities, including multifactor ranks
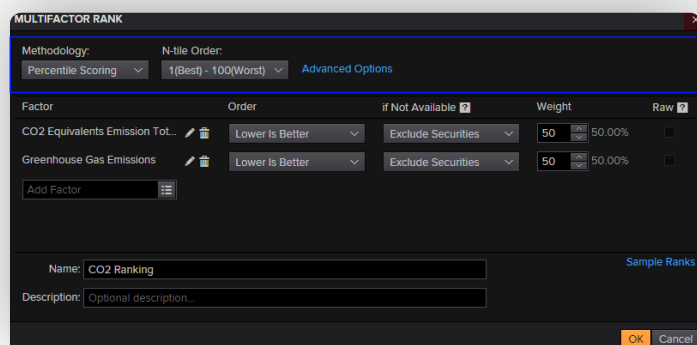
– You can not only rank on single factor but also across a combination of factors, from company fundamentals and ratios, to valuation metrics and our proprietary StarMine® analytics. To create a multifactor rank, click **Add Rank** (this is shown in the screenshot on page 1), then **New Multifactor Rank**. Use the field picker to select the factors you want to combine. In this example, two factors have been combined, each with a weighting of 50 percent: 'CO2 Equivalent Emission Total' and 'Greenhouse Gas Emissions'

– Use the scatter chart to visualise the results:
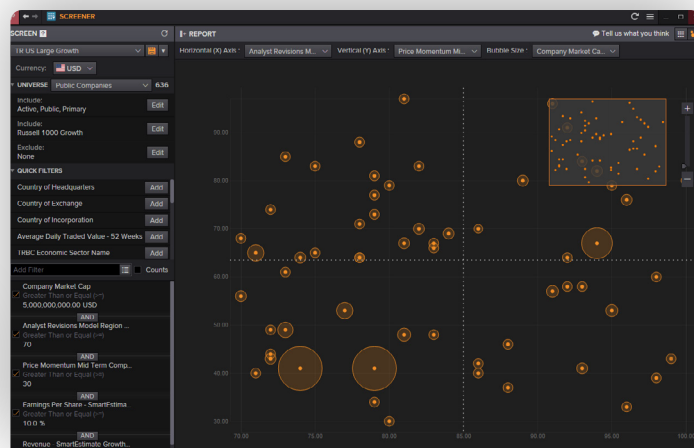
– Click on a company name or identifier in the results display to launch a company overview page for further analysis
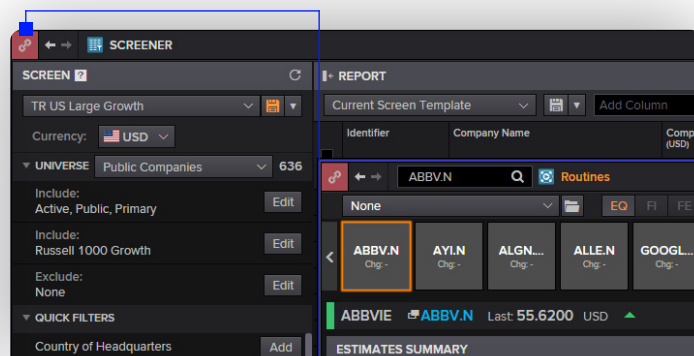
Need help?

You can contact us directly through Refinitiv Workspace. Click on the question mark icon top right through 'Get Help and Support.'

You can also access our entire blended learning offer on the training site: training.refinitiv.com/workspace

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