

I/B/E/S ON DATASTREAM

USER GUIDE

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Chapter 1 About this document

Intended Readership

The I/B/E/S on Datastream manual is intended for use only by Refinitiv clients.

In this document

The primary focus of this reference guide is to provide you with definitions of the data types available, the different methods of accessing the data, and a list of related data types. The information is presented in tables like this:

Mnemonic	Description	Mnemonics for other quarterly periods
I1DN	Number of INT1 estimates down since last monthly values	I2DN, I3DN, I4DN

This section is ordered by type of data - company related items, price related data and so on. Refer to the table of contents to find the page you need.

The glossary at the end of the guide gives additional information about terms used by I/B/E/S. A complete glossary of I/B/E/S terms is available for I/B/E/S customers directly from I/B/E/S.

Feedback

IBES datatypes and their definitions are also available online through Refinitiv Navigator, Datatype search. You can access Navigator through Datastream For Office (DFO) or the Url

<https://product.datastream.com/browse/search.aspx?dt=true>

Online documentation including the latest news on I/B/E/S products can be found on Refinitiv Infobase - <https://my.refinitiv.com/content/mytr/en/policies/Infobase/datastream-content.html>

If you have comments and suggestions on this guide, please send them via the Refinitiv helpdesk

Chapter 2 About I/B/E/S on Datastream

What is I/B/E/S

The Institutional Brokers Estimate System (I/B/E/S) provides investment professionals with a global database of analysts' forecast earnings for over 200 measures and recommendations for publicly traded corporations worldwide. Introduced in 1971 as a tool for investors in U.S. markets, I/B/E/S has expanded to 22,000 companies in more than 80 countries. I/B/E/S collects earnings estimates from analysts associated with 1,000 research firms globally.

I/B/E/S on Datastream: what is available?

Datastream Premium Package subscribers will be able to access current I/B/E/S data (**18 months**) covering all measures at no additional cost to the base package.

I/B/E/S History

I/B/E/S's extensive historical forecast data dates back to 1976 for the US and 1987 for non-US. History is available globally for the full range of I/B/E/S forecast measures. For more information on how to gain access to I/B/E/S history please speak to your usual Refinitiv representative.

I/B/E/S Global Aggregates

IB/E/S aggregate their stock level forecasts into market and proprietary index level global aggregates. This is a separate service, described in the I/B/E/S Global Aggregates on Datastream Reference Guide. Please speak with your Refinitiv sales or support representative for more details.

Update frequency

I/B/E/S monthly values are updated at the latest by close of business (EST) on the Thursday following the third Friday of the month. The monthly update overwrites all previous monthly values and adds the latest month's values. The monthly update is a snapshot taken on the Thursday preceding the third Friday of every month at close of business in New York.

Weekly and daily updates are available but note that only a small proportion of stocks will have a change on any given day. All stocks will have a value applied on a weekly basis, based on Thursday data. Daily updates are available only if there was a change made to one of its values (other than price) on the previous day. If no change has been made, the latest data available will be for the previous Thursday. No history of weekly or daily updates is available. The I/B/E/S database is updated the next business day by approximately 0900 hrs GMT. Weekly data is updated over the weekend, available to view on Datastream on the Monday.

Obtaining monthly I/B/E/S values on Datastream

Values change on the I/B/E/S monthly production days (14 May, 18 June etc). The weekly and daily "latest" values are not stored historically but overwritten when a subsequent weekly value, daily change or the monthly production value is received.

Start	07/05/2020
End	06/08/2020
Frequency	W
Name	MARKS & SPENCER GROUP - FY1 EPS MEAN EST
Code	mks(EPS1MN)
07/05/2020	17.44
14/05/2020	16.74
21/05/2020	16.74
28/05/2020	16.74
04/06/2020	16.74
11/06/2020	16.74
18/06/2020	7.51
25/06/2020	7.51
02/07/2020	7.51
09/07/2020	7.51
16/07/2020	6.89
23/07/2020	6.89
30/07/2020	6.89
06/08/2020	6.94

*Values change on I/B/E/S Monthly production days

In the above example, you can see that the values change on the I/B/E/S monthly production days (14 May, 18 June and 16 July). The weekly and daily “latest” values are not stored historically but overwritten when a subsequent weekly value, daily change or the monthly production value is received.

Requesting monthly data at different times

To ensure that monthly data is always displayed under the same month as the I/B/E/S production date, you must specify a START DATE which should be later than the 20th of the month and before the end of the month.

To ensure that monthly data is always displayed in line with the I/B/E/S production cycle, ignoring the weekly update, you must specify a START DATE of the 20th of the month. The data displayed will then be identical with that shown by other I/B/E/S historical products.

Dummy mnemonics to display the latest daily, weekly and monthly values

A series has been set up to display the date of the last daily, weekly and monthly values (for both summary and aggregates). These mnemonics should be used in conjunction with the TIME data type.

MNEM	DSCODE	NAME
IDCT	31449W	Date of last daily updated IBES summary value
IBWT	31449X	Date of last weekly updated IBES summary value

MNEM	DSCODE	NAME
IMCT	31450D	Date of last monthly updated IBES summary value
IAMT	31450F	Date of last monthly updated IBES aggr value

Chapter 3 Related items

Mnemonic	Description	Related data types
IBCTRY	<ul style="list-style-type: none"> Country of security The country where the corporate headquarters of the company is located 	
IBCUR	<ul style="list-style-type: none"> Currency of estimates The I/B/E/S code for the currency in which estimates are provided IBCUR is the ISO code in most cases 	IBCTRY
IBGRP	<ul style="list-style-type: none"> Group code for the company A subset of an industry Code assignment and classification are made by I/B/E/S. 	IBSCT, IBIND
IBIND	<ul style="list-style-type: none"> Industry code for the company An industry is a collection of companies with similar business lines Code assignment and classification are made by I/B/E/S. 	IBGRP, IBSCT
IBSCT	<ul style="list-style-type: none"> Stock sector code for the company Major subset of the market from a collection of similar industries Code assignment and classification are made by I/B/E/S. 	IBGRP, IBIND
IBTKR	<ul style="list-style-type: none"> Ticker The unique identifier used by I/B/E/S for a company The ticker is prefixed with '@:' to ensure that it is unique. 	NAME, IBCTRY
NAME	<ul style="list-style-type: none"> Company name A standard Datastream data type, which retrieves the I/B/E/S name for a company if there is no corresponding Datastream name 	IBTKR
PNTCON	Indicator showing whether EPS figures are on a parent (P) or consolidated (C) basis	
IBUNIT	<ul style="list-style-type: none"> Unit for non per share data <p>This is a numeric value of either 1 for non per share data in millions or 1,000 for billions. This allows comparison of non per share measures across markets. Please see page 23 for list of markets where non per share data is expressed in billions.</p>	

Chapter 4 Datatype architecture

The datatypes listed in the first column of this table are for EPS fiscal year 1. For other fiscal years change the “1” to a “2”, “3”, “4”, or “5”. For example, EPS3CV is the datatype for the earnings per share coefficient of variation of all the FY3 estimates. Descriptions are consistent across all fiscal years: for “FY1” substitute “FY2”, “FY3”, “FY4”, or “FY5” in the descriptions given below. For other measures, EPS can be replaced with the corresponding 3-

character code, for example; DPS – Dividend per share, SAL – Sales. A full list of measure character codes is detailed below in [chapter 5](#)

Datatype	Description	Datatypes for other fiscal years
EPS1	Mean earnings per share for FY1 (next fiscal year end to be reported)	EPS2
EPS1D	Fiscal Year End for EPS1	EPS2D
PE1	<ul style="list-style-type: none"> Price to earnings ratio for FY1 Calculated as Datastream price/EPS1 	PE2
EPS1MN	Mean value for all FY1 estimates for a company (Same as EPS1)	EPS2MN, EPS3MN, EPS4MN, EPS5MN
EPS1YR	<ul style="list-style-type: none"> Fiscal year end of the next period to be reported Returned in either American (MM-DD-YY) or European (DD/MM/YY) format (same as EPS1D) 	EPS2YR, EPS3YR, EPS4YR, EPS5YR
EPS1CV	<ul style="list-style-type: none"> Coefficient of variation of all the FY1 estimates A measure of the spread of the estimates in terms of the standard deviation Calculated according to the equation: $CV(\%) = (EPS1SD / \text{Absolute value of } EPS1MN) * 100$ 	EPS2CV, EPS3CV, EPS4CV, EPS5CV
EPS1HI	Highest value of all FY1 estimates for a company	EPS2HI, EPS3HI, EPS4HI, EPS5HI
EPS1LO	Lowest value of all FY1 estimates for a company	EPS2LO, EPS3LO, EPS4LO, EPS5LO
EPS1MD	Median value of all FY1 estimates for a company	EPS2MD, EPS3MD, EPS4MD, EPS5MD
EPS1SD	Standard deviation of all the FY1 estimates that make up the consensus	EPS2SD, EPS3SD, EPS4SD, EPS5SD
EPS1PER	<ul style="list-style-type: none"> Calculated PE ratio using I/B/E/S price data and FY1 mean estimate I/B/E/S price data may not be updated daily. If the earnings estimate is negative the PER is not calculated – a value of 'N/A' is returned $EPS1PER = IBP/EPS1MN$. 	EPS2PER, EPS3PER, EPS4PER, EPS5PER
EPS1FD12	12 month forward earnings per share	
	Estimates and Actuals on a calendar year basis Where ## is replaced by an YY date	
	Actuals	
A##EPS	Actual value for Earnings Per Share for year ending '##'	
Forecast		
EPSE##MN	Mean for estimate with year ending '##' (Static)	
EPSE##MD	Median for estimate with year ending '##' (Static)	
EPSE##SD	Standard deviation with estimate for year ending '##' (Static)	
	Total Revision data types	
EPS1DN	Number of FY1 estimates down since last monthly values	EPS2DN, EPS3DN, EPS4DN, EPS5DN
EPS1DNW	Number of FY1 estimates down since last week values	EPS2DNW, EPS3DNW, EPS4DNW, EPS5DNW

Datatype	Description	Datatypes for other fiscal years
EPS1DN4W	Number of FY1 estimates down since the weekly values four weeks ago	EPS2DN4W, EPS3DN4W, EPS4DN4W, EPS5DN4W
EPS1UP	Number of FY1 estimates up since last monthly values	EPS2UP, EPS3UP, EPS4UP, EPS5UP
EPS1UPW	Number of FY1 estimates up since last week values	EPS2UPW, EPS3UPW, EPS4UPW, EPS5UPW
EPS1UP4W	Number of FY1 estimates up since the weekly values four weeks ago	EPS2UP4W, EPS3UP4W, EPS4UP4W, EPS5UP4W
EPS1NET	Total # of estimates (including those excluded from the Mean) associated with FY1 forecast	EPS2NET, EPS3NET, EPS4NET, EPS5NET
Revision data types within the mean		
EPS1XD	Number of FY1 estimates in the Mean down since last monthly values	EPS2XD, EPS3XD, EPS4XD, EPS5XD
EPS1XDW	Number of FY1 estimates in the Mean down since last weekly values	EPS2XDW, EPS3XDW, EPS4XDW, EPS5XDW
EPS1XD4W	Number of FY1 estimates in the Mean down since the weekly values four weeks ago	EPS2XD4W, EPS3XD4W, EPS4XD4W, EPS5XD4W
EPS1XU	Number of FY1 estimates in the Mean up since last monthly values	EPS2XU, EPS3XU, EPS4XU, EPS5XU
EPS1XUW	Number of FY1 estimates in the Mean up since last weekly values	EPS2XUW, EPS3XUW, EPS4XUW
EPS1XU4W	Number of FY1 estimates in the Mean up since the weekly values four weeks ago	EPS2XU4W, EPS3XU4W, EPS4XU4W, EPS5XU4W
EPS1NE	Total Number of estimates in the mean associated with FY1 forecast	EPS2NE, EPS3NE, EPS4NE, EPS5NE

Quarterly data

The datatypes listed in the first column of this table are for EPS next quarterly period. For other fiscal periods change the "1" to a "2", "3", or "4". For other measures, EPS can be replaced with the corresponding 3-character code.

Datatype	Description	Datatype for other quarterly periods
EPSI1CV	<ul style="list-style-type: none"> Coefficient of variation of all the INT1 estimates A measure of the spread of the estimates in terms of the standard deviation Calculated according to the equation: $CV(\%) = (EPSI1SD / \text{Absolute value of } EPSI1MN) * 100$ 	EPSI2CV, EPSI3CV, EPSI4CV
EPSI1DN	Number of INT1 estimates down since last monthly values	EPSI2DN, EPSI3DN, EPSI4DN
EPSI1DN4W	Number of INT1 estimates down since the weekly values four weeks ago	EPSI2DN4W, EPSI3DN4W, EPSI4DN4W
EPSI1DNW	Number of INT1 estimates down since last weekly values	EPSI2DNW, EPSI3DNW, EPSI4DNW

Datatype	Description	Datatype for other quarterly periods
EPSI1HI	Highest value of all INT1 estimates for a particular company	EPSI2HI, EPSI3HI, EPSI4HI
EPSI1LO	Lowest value of all INT1 estimates for a particular company	EPSI2LO, EPSI3LO, EPSI4LO
EPSI1MD	Median value of all INT1 estimates for a company	EPSI2MD, EPSI3MD, EPSI4MD
EPSI1MN	Mean value of all INT1 estimates for a company	EPSI2MN, EPSI3MN, EPSI4MN
EPSI1NE	Total number of estimates associated with INT1 forecast	EPSI2NE, EPSI3NE, EPSI4NE
EPSI1SD	Standard deviation of all the INT1 estimates that make up the consensus	EPSI2SD, EPSI3SD, EPSI4SD
EPSI1UP	Number of INT1 estimates up since last monthly values	EPSI2UP, EPSI3UP, EPSI4UP
EPSI1UP4W	Number of INT1 estimates up since the weekly values four weeks ago	EPSI2UP4W, EPSI3UP4W, EPSI4UP4W
EPSI1UPW	Number of INT1 estimates up since last weekly values	EPSI2UPW, EPSI3UPW, EPSI4UPW
EPSI1YR	<ul style="list-style-type: none"> End date of quarterly period 1 (INT1) Relates to the quarterly period for which results are due to be announced 	EPSI2YR, EPSI3YR, EPSI4YR

Historical long-term growth

Datatype	Description
YR5GTH	<ul style="list-style-type: none"> Historical five year growth The rate of change in reported earnings per share over the five year time intervals terminating on the date of the last fiscal period for which EPS have been announced
YR5STB	A measure of stability of the last five years actual EPS values

Forecasts by fiscal year – Timeseries

For all timeseries datatypes below ## is replaced by a YY date. For example, EPS20MN gives the mean for the forecasts with a fiscal year end in 2020.

Note that the ***##x data types do not pad on Datastream. This means that when downloading against a list, values will only be returned for those companies that have a year-end coincidental with the date for which you are running the enquiry.

These datatypes are similar to the F1 – F5 data types but are referenced by fiscal year end date and not relative fiscal year. For example:

- EPS1MN represents the mean earnings forecast for the current fiscal year.
- EPS20MN represents the forecasts made for fiscal years ending in 2020.

These data types are available in a time series request. EPS can be replaced with the 3-character code for alternative measures.

Datatype	Description
EPS##CV	<ul style="list-style-type: none"> • Coefficient of variation of estimates for year ending '###' • Calculated from EPS##SD and EPS##MN as for other coefficient of variation data types
EPS##FYI	<ul style="list-style-type: none"> • Fiscal year indicator associated with fiscal year '###' • For example, in October 2019 ***02FYI may return value of FY2 indicating that in October 19 the forecast associated with 2019 was FY2.
EPS##HI	<ul style="list-style-type: none"> • Highest value of all estimates for year ending '###' • The same data as EPSnHI but accessed by year end date and not data type
EPS##LO	<ul style="list-style-type: none"> • Lowest value of all estimates for year ending '###' • The same data as EPSnLO but accessed by year end date and not data type
EPS##MD	<ul style="list-style-type: none"> • Median estimate for year ending in ## • The same data as EPSnMD but accessed by year end date
EPS##MN	<ul style="list-style-type: none"> • Mean estimate for year ending in '###' • The same data as EPSnMN but accessed by year end date and not data type
EPS##NE	<ul style="list-style-type: none"> • Number of estimates for fiscal year ending in ## • The same data as EPSnNE but accessed by year end date
EPS##SD	<ul style="list-style-type: none"> • Standard deviation of estimates for year ending '###' • The same data as EPSnSD but accessed by year end date and not data type
EPS##YR	<ul style="list-style-type: none"> • Fiscal year end date of the company for the requested year • For example, EPS93YR returns 31/12/93 for a company with a December year end.

Estimates and Actuals on a fiscal year basis – Static

Fiscal Year datatypes are available via static requests and retrieve the latest value for the fiscal year. These are an addition to the timeseries of fiscal year datatypes, extending to a larger set of measures for both estimates and actuals. The estimates datatypes are for Mean, Median and Standard Deviation values.

In the below table ## is replaced by an YY date – for example, the actual value for EPS for 2019 can be retrieved using A19EPS. For the forecast estimates datatypes that identifies the measure i.e. EPS and 'E' for a constant to indicate an estimate – for example, the forecast Mean value for EPS for 2020 can be retrieved using EPSE20MN.

Actuals

Datatype	Description
	Actuals
A##EPS	Actual value for Earnings per share for year ending '###'
	Forecast
EPSE##MN	Forecast mean for Earning estimate for year ending '###'
EPSE##MD	Forecast median for Earning estimate for year ending '###'

EPSE##SD

Forecast standard deviation for Earning estimate for year ending '##'

Historical annual Actuals

The datatypes listed in the first column of this table are for datatypes for the last fiscal year reported (FY0). For earlier fiscal years change the "0" to a "P1", "P2", or "P3". For example, FP2EPS is the mnemonic for the reported annual EPS for the fiscal year two years prior to the last one reported (the year two years before FY0, which is FY-2). Available mnemonics for other fiscal years are listed in the Mnemonics for other fiscal years column. Descriptions are consistent across all fiscal years: for FY0 substitute "FY-1", "FY-2" or "FY-3" in the descriptions given below.

Datatype	Description	Datatypes for other fiscal years
F0EPS	Reported annual EPS for the last fiscal year (FY0)	FP1EPS, FP2EPS, FP3EPS
EPS0YR	The end date of the fiscal year for the last reported EPS figure (F0EPS)	EPSP1YR, EPSP2YR, EPSP3YR

Actual interim

The datatypes listed in the first column of this table are for datatypes for the last interim period reported (INT0). For earlier interim periods change the "0" to a "P1", "P2", or "P3". For example, IP2EPS is the mnemonic for the reported interim EPS for the interim period before that represented by IP1EPS (the period two before INT0, that is INT-2). EPS can be replaced with the 3-character code for alternative measures.

Descriptions are consistent across all periods: for INT0 substitute "INT-1", "INT-2" or "INT-3" in the descriptions given below.

Datatype	Description	Datatypes for other fiscal years
I0EPS	Latest reported interim EPS	IP1EPS, IP2EPS, IP3EPS
EPSI0YR and I0EYR	<ul style="list-style-type: none"> The end date of the fiscal period for the last reported interim EPS figure (INT0). Returned in either American (MM-DD-YY, use I0YR) or European (DD/MM/YY, use I0EYR) format 	EPSIP1YR, EPSIP2YR, EPSIP3YR

Restated Actuals

The following datatypes enable the retrieval of actual revisions within the mean that have been restated after the initial actuals have been announced. EPS can be replaced with the 3-character code for alternative measures.

Datatype	Description	Datatypes for other fiscal years
R0EPS	Restated annual EPS	RP1EPS, RP2EPS, RP3EPS
RIEPS	Restated interim EPS	RIEPS, RI2EPS, RI3EPS, RI4EPS

Expected report date

The daily Expected Report Date includes algorithm-calculated EPS expected report dates for the next two quarterly periods for all current companies that show changes in actuals processed since close of previous business day. In the cases where quarterly reported actuals do not exist and the estimated report dates cannot be derived, there is no expected report date output. The weekly Expected Report Date contains the next two expected report dates for all current Thomson Reuters companies, where available, as of the close of business of each Thursday at midnight.

Datatype	Description
IBEFPD	Expected Fiscal Period
IBQ1EEDT	Q1 Report Date
IBQ1ERDT	Q1 Expected Report Date
IBQ2EEDT	Q2 Report Date
IBQ2ERDT	Q2 Expected Report Date

Company expected report date

The Company Expected Report Date contains the next EPS expected report dates for two quarterly periods in the future as provided by the companies themselves. Only companies for which dates have been confirmed as of the close of business on the most recent Thursday night are included in the weekly snapshot.

Datatype	Description
IBFPD	Expected Fiscal Period
IBQ1ENDT	Q1 Report Date
IBQ1CRDT	Q1 Expected Report Date
IBQ2ENDT	Q2 Report Date
IBQ2CRDT	Q2 Expected Report Date

Chapter 5 Additional measures

Over 200 measures are available for 5 fiscal years plus the last reported values (where available). The table below indicates the measures that are available for each region. Please see the [glossary](#) for full details of these measures

Measure	Suffix	International	US	History
All in Production Cost (AISC) Gold	ACG	✓	✓	Jul-16
All in Production Cost (AISC) Silver	ACS	✓	✓	Jul-16
Adjusted Funds from Operations	AFF	✓	✓	Dec-12
Adjusted Funds from Operations (PS)	AFO	✓	✓	Jul-07
Access Lines	ALN	✓	✓	Aug-14
Annual Premium Earned	APE	✓	✓	Dec-12
Average Price (PMT) – Steel	APS	✓	✓	Jul-16
Average Revenue per Unit	ARP	✓	✓	Aug-14
Advertisement Revenue	ARV	✓	✓	Oct-17
Available Seat Kilometers	ASK	✓	✓	Apr-13
Available Seat Miles	ASM	✓	✓	Apr-13
Assets Under Management	AUM	✓	✓	Dec-12
Average Selling Price	AVS	✓	✓	Oct-17
Backlog Average Price	BAP		✓	Apr-13
Book-To-Bill Ratio	BBR	✓	✓	Oct-17
Backlog Values	BGV	✓	✓	Dec-12
Billings	BIL	✓	✓	Oct-17
Gross Bookings	BKG	✓	✓	Oct-17
Backlog Units	BKU	✓	✓	Apr-13
Book Value on GAAP Basis	BKV	✓	✓	Dec-12
Billed Business	BLB	✓	✓	Dec-12
Book Value Per Share	BPS	✓	✓	Dec-96
Average Booking per User	BPU	✓	✓	Nov-17
Cargo Available Tonne Kilometer	CAK	✓	✓	Oct-17
Capital Expenditure	CAP	✓	✓	Oct-06
Mining Cash Cost (oz) – Copper	CCC	✓	✓	Jul-16
Customer Deposits Under Total Deposits	CDT	✓	✓	Dec-12
Average Container Freight Rate	CFR	✓	✓	Dec-12
Catastrophic Loss Ratio	CLR	✓	✓	Dec-12

Claims Ratio	CMR	✓	✓	Dec-12
Chemicals Income	CNC	✓	✓	May-12
Combined ratio	COR	✓	✓	Dec-12
Cost per ASM	CPA	✓	✓	Apr-13
Cost per Click	CPK		✓	Oct-17
Cost per Mille	CPM		✓	Oct-17
Cash Flow Per Share	CPS	✓	✓	Feb-90
Cargo Revenue Yield per Tonne Kilometers	CRK	✓	✓	Oct-17
CHURN (%)	CRN	✓	✓	Aug-14
Cash Earnings Per Share	CSH	✓	✓	Jan-97
Consolidated Loss Ratio	CSL	✓	✓	Dec-12
Core Tier 1 Capital	CTO	✓	✓	Oct-12
Contracted Sales	CTS	✓		Dec-12
Deliveries Average Price	DAP	✓	✓	Apr-13
Daily Active Users	DAR	✓	✓	Oct-17
Distributable Cash Flow Per Unit	DCF	✓	✓	Dec-12
Distributable Cash Flow Aggregate	DFF	✓	✓	Apr-13
Current Deferred Revenue	DFR	✓	✓	Jul-16
Deliveries (Number of Units)	DLU	✓	✓	Apr-13
Deliveries (Monetary Value)	DLV	✓	✓	Apr-13
Department Store Sales	DOS	✓	✓	Apr-13
Dividends Per Share	DPS	✓	✓	Dec-93
Discount Fees	DSF	✓	✓	Dec-12
Development Costs	DVC	✓	✓	Dec-12
Downstream Income	DWI	✓	✓	Dec-12
EBITDA	EBD	✓	✓	Dec-98
Earnings Before Goodwill (PS)	EBG	✓		Dec-95
EBITDA Per Share	EBS	✓	✓	Aug-02
EBIT	EBT	✓	✓	May-99
Embedded Value	EBV	✓	✓	Dec-12
EBITDAX	EBX	✓	✓	May-12

Efficiency Ratio	EFR	✓	✓	Sep-12
EV Operating Profits	EVO	✓	✓	Dec-12
Enterprise Value	EVT	✓	✓	Oct-06
Exploration Expense	EXP	✓	✓	May-12
Expense Ratio	EXR	✓	✓	Dec-12
Free Cash Flow Per Share	FCF	✓	✓	Jul-07
Fees & Commissions Income	FCI	✓	✓	Oct-12
Funds From Operations (PS)	FFO	✓	✓	Mar-90
Franchise & Licensing Fees	FLF	✓	✓	Aug-14
Floor Space	FLS	✓	✓	Apr-13
Funds from Operations	FOP	✓	✓	Dec-12
Financial Services Sale	FSV	✓	✓	Apr-13
Growth Capex	GCX	✓	✓	Jul-15
Gross Earned Premiums	GEP	✓	✓	Dec-12
Gross Merchandise Value	GMV	✓	✓	Oct-17
Gas Production Per Day	GPD	✓	✓	Dec-12
GAAP Earnings Per Share	GPS	✓	✓	Aug-03
Gross Payment Volume	GPV	✓	✓	Oct-17
Gross Premiums Written	GPW	✓	✓	Dec-12
Gross Margin	GRM	✓	✓	Oct-06
Gross Subscriber Addition	GSA	✓	✓	Sep-14
Gross Win	GWN	✓	✓	Oct-17
Home Sales	HSL	✓	✓	Apr-13
Intangible Book Value	IBV	✓	✓	Dec-12
Net Income	INC	✓	✓	Nov-94
Launches	LCH	✓	✓	Apr-13
Loan Loss Provisions	LLP	✓	✓	Sep-12
Land/Lot Sales	LLS	✓	✓	Apr-13
Lead Metal Processing Production	LMP	✓	✓	Oct-17
Loans	LNS	✓	✓	Sep-12
Lease Operating Expense	LOE	✓	✓	Dec-13

Monthly Active Users	MAU	✓	✓	Oct-17
Mining Cash Cost (oz) – Total	MCC	✓	✓	Aug-14
Mining Cash Cost (oz) – Gold	MCG	✓	✓	Aug-14
Mining Cash Cost (oz) – Platinum	MCP	✓	✓	Sep-14
Mining Cash Cost (oz) – Silver	MCS	✓	✓	Aug-14
Maintenance Capex	MCX	✓	✓	Apr-13
Medical Loss Ratio	MLR	✓	✓	Dec-12
Marketing Income	MNC	✓	✓	May-12
Motorcycle Shipments	MOS	✓	✓	Oct-17
Mining Production (oz) – Gold	MPG	✓	✓	Aug-14
Mining Production (oz) – Platinum	MPP	✓	✓	Sep-14
Mining Production (oz) – Silver	MPS	✓	✓	Aug-14
Monthly Unique Payers	MUP	✓	✓	Oct-17
Monthly Unique Users	MUU	✓	✓	Oct-17
Net Charge- Offs/Average Loans	NAL	✓	✓	Oct-12
Net Sales per Average Square Foot	NAS	✓	✓	Apr-13
Net Asset Value	NAV	✓	✓	May-99
Net Operating Income (NOI) Margin	NCR	✓	✓	Dec-12
Net Operating Income (NOI) Margin	NCR	✓	✓	Dec-12
Net Debt	NDT	✓	✓	Jul-00
Reported Net Income	NER	✓	✓	Jul-08
Net Income on EV basis	NEV	✓		Dec-12
NAREIT-Defined Funds from Operations per Share	NFO	✓	✓	Dec-12
Net Gains/Losses	NGL	✓	✓	Dec-12
Non-Interest Expense	NIE	✓	✓	Oct-12
Net Interest Income	NII	✓	✓	Sep-12
Net Interest Margin	NIM	✓	✓	Sep-12
Total Non-Interest Revenue	NIR	✓	✓	Sep-12
Net Interest Spread	NIS	✓	✓	Dec-12
Net Merchandise Value	NMV	✓	✓	Dec-17
Net New Money/Assets	NNM	✓	✓	Dec-12

Non-Periodic NAV	NNV	✓	✓	Dec-12
New Orders Average Price	NOA		✓	Apr-13
Net Operating Income	NOI	✓	✓	Dec-12
Number of Stores Opened (by Total)	NOO	✓	✓	Apr-13
Number of Stores (by Total)	NOS	✓	✓	Apr-13
New Orders – Unit	NOU	✓	✓	Apr-13
New Orders – Value	NOV	✓	✓	Apr-13
Non-Performing Assets	NPA	✓	✓	Oct-12
Net Premiums Earned	NPE	✓	✓	Dec-12
Non-Performing Loans	NPL	✓	✓	Oct-12
Non-Periodic NAV per Share	NPN	✓	✓	Dec-12
NGL Production Per Day	NPP	✓	✓	Dec-12
Net Premiums Written	NPW	✓	✓	Dec-12
Non-Recurring Items	NRI	✓	✓	Dec-12
Net Revenue	NRV	✓	✓	Apr-13
Net Subscriber Additions	NSA	✓	✓	Aug-14
Number of Stores	NSC	✓	✓	Apr-13
Occupancy Rate	OCR	✓	✓	Dec-12
Cost per ASK	OEA	✓	✓	Apr-13
Oil Production Per Day	OPD	✓	✓	Dec-12
Operating Expense	OPE	✓	✓	Sep-12
Operating Profit	OPR	✓	✓	Jul-97
OPEX Per Unit	OPU	✓	✓	Aug-14
Other Real Estate Owned (OREO) Expense	ORE	✓	✓	Dec-12
Production Expenses	PEX	✓	✓	Dec-13
Passenger Load Factor	PLF	✓	✓	Apr-13
Premium/NAV	PMN	✓	✓	Dec-12
Pre-Opening Expense	POC	✓	✓	Aug-14
Pre-tax profit	PPS	✓	✓	Jul-94
Revenue per ASK	PRA	✓	✓	Apr-13
Revenue per ASM	PRK	✓	✓	Apr-13

Price/NAV	PRN	✓	✓	Dec-12
Reported Pre-Tax Profit	PRR	✓	✓	Jul-08
Price Target	PT	✓	✓	Mar-99
Production Tax	PTX	✓	✓	Apr-13
1P Proved Reserves	PVR	✓	✓	Aug-14
Revenue Cargo Tonne Kilometers	RCK	✓	✓	Jan-18
Recommendations	REC	✓	✓	Nov-93
Restaurant Expense	REE	✓	✓	Jan-18
Retails Sales	RES	✓	✓	Apr-13
Rent Expense	REX	✓	✓	Apr-13
Realized Price - Gold	RGO	✓	✓	Jul-16
Return on Net Operating Assets	RNA	✓	✓	Dec-12
Refining Income	RNC	✓	✓	May-12
Return on Assets (%)	ROA	✓	✓	Aug-99
Return on Equity (%)	ROE	✓	✓	May-99
Realized Price - Copper	RPC	✓	✓	Jul-16
Realized Price Gas	RPG	✓	✓	Dec-13
Revenue Passenger Kilometers	RPK	✓	✓	Apr-13
Revenue Passenger Miles	RPM	✓	✓	Apr-13
Realized Price Oil	RPO	✓	✓	Dec-13
Revenue per RPM	RPP	✓	✓	Apr-13
Realized Price - Silver	RPS	✓	✓	Jul-16
Rent per Square Foot	RSM	✓	✓	Dec-12
Revenue per RPK	RTR	✓	✓	Apr-13
Risk Weighted Assets	RWA	✓	✓	Sep-12
Realized Gains/Losses	RZG	✓	✓	Dec-12
Realized Price (BOE)	RZP	✓	✓	Jul-13
Subscriber Acquisition Cost (SAC)	SAC	✓	✓	Aug-14
Sales	SAL	✓	✓	Feb-96
Securities in Issue Under Total Deposits	SID	✓	✓	Dec-12
Solvency Margin	SLM	✓	✓	Oct-17

Subscribers	SUB	✓	✓	Aug-14
Traffic Acquisition Cost	TAC	✓	✓	Apr-13
Tangible Book Value Per Share	TBV	✓	✓	Jul-08
Tier 1 Capital Ratio	TCO	✓	✓	Oct-12
Trading Income	TDI	✓	✓	Oct-12
Total Deposits	TDO	✓	✓	Sep-12
TEUs Handled	TEU	✓	✓	Oct-17
Total Income	TIN	✓	✓	Oct-12
Mining Production (oz) - Total	TMP	✓	✓	Aug-14
Tangible Book Value	TNB	✓	✓	Dec-12
Total Production - Copper (Weight)	TOC	✓	✓	Jul-16
Total Production - Total	TPC	✓	✓	Aug-14
Total Production Per Day (in BOE)	TPD	✓	✓	Dec-12
Total Production - Gas	TPG	✓	✓	Aug-14
Throughput Info	TPI	✓	✓	Dec-12
Total Production - NGL	TPN	✓	✓	Aug-14
Total Production – Oil	TPO	✓	✓	Aug-14
Total Production Per Day	TPP	✓	✓	Dec-12
Total Payment Volume	TPV		✓	Jan-18
Total Revenues Net of Interest Expense	TRI	✓	✓	Dec-12
Total Railcar Loads	TRL	✓	✓	Oct-17
Total Silver Equivalent Production (Weight)	TSE	✓	✓	Jul-16
Upstream Income	UPI	✓	✓	Dec-12
Unit Sales (Per Metric Tonne) - Steel	USS	✓	✓	Jul-16
Vacancy Rate	VCR	✓	✓	Dec-12
Value of New Business	VNB	✓	✓	Dec-12

Chapter 6 quarterly actuals for additional measures

Both the latest and restated interim periods can be retrieved for all measures by creating the quarterly actual data types

Last quarterly IO*** (Three character suffix can be found in chapter 5)

Restated RI*** (Three character suffix can be found in chapter 5)

Most commonly used quarterly estimates are listed below

Mnemonic	Description
CAP	Capital Expenditure
EBT	Earnings before interest and taxes
EBD	Earnings before interest, taxes, depreciation and amortization
EVT	Enterprise Value
GRM	Gross Margin
INC	Net Income
OPR	Operating Profit
SAL	Sales

Actuals data types

Last reported quarterly period data types.

Mnemonic	Description	Mnemonics for other interim periods
IOCAP	Last quarterly period reported for capital expenditure	IP1CAP, IP2CAP, IP3CAP, IP4CAP
RICAP	Restated quarterly period reported for capital expenditure	RI1CAP, RI2CAP, RI3CAP, RI4CAP
IOEBT	Last quarterly period reported for EBIT	IP1EBT, IP2EBT, IP3EBT, IP4EBT
RIEBT	Restated quarterly period reported for EBIT	RI1EBT, RI2EBT, RI3EBT, RI4EBT
IOEBD	Last quarterly period reported for EBITDA	IP1EBD, IP2EBD, IP3EBD, IP4EBD
RIEBD	Restated quarterly period reported for EBITDA	RI1EBD, RI2EBD, RI3EBD, RI4EBD
IOEVT	Last quarterly period reported for enterprise value	IP1EVT, IP2EVT, IP3EVT, IP4EVT
RIEVT	Restated quarterly period reported for enterprise value	RI1EVT, RI2EVT, RI3EVT, RI4EVT
IOGRM	Last quarterly period reported for gross margin	IP1GRM, IP2GRM, IP3GRM, IP4GRM
RIGRM	Restated quarterly period reported for gross margin	RI1GRM, RI2GRM, RI3GRM, RI4GRM
IOINC	Last quarterly period reported for net income	IP1INC, IP2INC, IP3INC, IP4INC
RIINC	Restated quarterly period reported for net income	RI1INC, RI2INC, RI3INC, RI4INC
IOOPR	Last quarterly period reported for operating profits	IP1OPR, IP2OPR, IP3OPR, IP4OPR

RIOPR	Restated quarterly period reported for operating profits	RI1OPR, RI2OPR, RI3OPR, RI4OPR
I0SAL	Last quarterly period reported for sales	IP1SAL, IP2SAL, IP3SAL, IP4SAL
RISAL	Restated quarterly period reported for sales	RI1SAL, RI2SAL, RI3SAL, RI4SAL

Chapter 7 Additional Analytics

Recommendations

Recommendations are retrievable via both Static and Time Series requests. Recommendations history is available from December 2005 going forward

Mnemonic	Description
RECNO	Number of recommendations
RECCON	Recommendation consensus
RECTXT	Text field translation of RECCON
RECMED	Recommendation Median
RECSTD	Recommendation Standard Deviation
RECNOU	Number of Recommendations Up
RECNOU	Number of Recommendations Down
RECBUY	Percentage of Buy Recommendations
RECSSELL	Percentage of Sell Recommendations
RECHOLD	Percentage of Hold Recommendations

RECCON	RECTXT	RECCON Value	Definition
1	SBUY	Between 1 & 1.49	Strong Buy
2	BUY	Between 1.5 & 2.49	Buy
3	HOLD	Between 2.5 & 3.49	Hold
4	UPRF	Between 3.5 & 4.49	Under Perform
5	SELL	Between 4.5 & 5	Sell

Price Target

Price Target data types are available under Static and Time series requests. Listed below are Price Target data types.

Mnemonic	Description
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PTMN	Price target mean value
PTNE	Price target number of estimates
PTHI	Price target high value
PTLO	Price target low value
PTUP4W	Price targets up in the last four weeks
PTDN4W	Price targets down in the last four weeks
PTUP1M	Price target up In Last Month
PTDN1M	Price target down In Last Month
PTMD	Price target median value
PTSD	Price target standard deviation

12 Month Forward

Mnemonic	Description
EPS1FD12	<p>Also referred to as “12 month forward EPS” Calculated on the fly from the mean values. The 12 month forward EPS for FY1 is calculated as follows:</p> $\text{EPS1FD12} = ((M \times F1) + ((12 - M) \times F2)) / 12$ <p>where: M = Number of month ends to end of current fiscal year. Note that the current fiscal year will be FY1 if the date is before FY1 year end, and FY2 if the date is after FY1 year end. F1 = Consensus earnings forecast for current fiscal year F2 = Consensus earnings forecast for next fiscal year This data type is particularly useful for time series analysis of earnings forecasts over recent history, especially where the period of measurement incorporates a fiscal year end.</p>

12 Month Trailing

Mnemonic	Description
EPS1TR12	<p>Calculated on the fly from the mean forecast and actual values. The 12 month trailing EPS for FY1 is calculated as follows:</p> $\text{EPS1TD12} = ((M \times F0) + ((12 - M) \times F1)) / 12$ <p>where: M = Number of month ends to end of current fiscal year. Note that the current fiscal year will be FY1 if the date is before the FY1 year end and FY2 if the date is after FY1 year end. F0 = Consensus forecast or actual earnings for the period to the previous fiscal year. F1 = Consensus forecast for the period to the current fiscal year.</p>

Forecast Long-term growth

Mnemonic	Description
LTDN	Number of long term growth estimates down in the last month
LTDNW	Number of long term growth estimates down since last weekly values
LTDN4W	Number of long term growth estimates down since the weekly values four weeks ago
LTHI	Highest value of the long term growth estimates
LTLO	Lowest value of the long term growth estimates
LTMD	<ul style="list-style-type: none"> Median long term growth estimate A composite estimate of the anticipated annual growth rate in EPS over a five year period
LTMN	<ul style="list-style-type: none"> Mean long term growth estimate The mean of all long term growth estimates, expressed as a percentage Note: I/B/E/S place more importance on the median for long term growth
LTNE	Total number of long term growth estimates
LTSD	Standard deviation of the long term growth estimates
LTUP	Number of long term growth estimates up in the last month
LTUP4W	Number of long term growth estimates up since the weekly values four weeks ago
LTUPW	Number of long term growth estimates up since last weekly values

Surprise earnings datatypes

Surprise earnings data types are only available for companies that have quarterly data coverage. Only the current values of these data types are held – no history is maintained.

Mnemonic	Description
SUE	<ul style="list-style-type: none"> Standardized Unanticipated earnings Score Ratio of the absolute surprise to estimate dispersion Measure of the distance between the two values in terms of standard deviation of the estimates
SURDT	<ul style="list-style-type: none"> Interim surprise date The date on which the latest interim earnings were announced
SURMN	<ul style="list-style-type: none"> Interim surprise mean EPS The last I/B/E/S estimate for the quarter that has just been reported
SURPD	<ul style="list-style-type: none"> Surprise Difference The absolute difference between the latest interim EPS and the last estimate EPS for the period
SURPP	<ul style="list-style-type: none"> Percentage surprise The percentage difference between the latest interim EPS and the last estimated EPS for the period
SURSD	<ul style="list-style-type: none"> Interim surprise standard deviation The standard deviation of all estimates that make up the interim surprise mean (SURMN) for the quarter just reported

Flash Estimates

Flash estimates are based on the estimates received by I/B/E/S in the most recent weeks. They give a more up to date picture, reflecting the most recent views of analysts.

The mnemonics listed in the first column of this table are for fiscal year 1 ("F1..") or interim period 1 ("I1.."). For other fiscal years change the "1" to a "2". For interim periods change the "F" to an "I". For example EPS2FNE is the mnemonic for the total number of FY2 EPS estimates received in the last four weeks; EPSI1FMN is the mnemonic for the mean of all INT1 estimates received in the last four weeks. Available mnemonics for other fiscal years and interim periods are listed in the Mnemonics for other fiscal years and interim periods column. Descriptions are consistent across all periods: for FY1 substitute "FY2", "INT1" or "INT2" in the descriptions given below.

Mnemonic	Description	Mnemonics for other fiscal years and interim periods
EPS (F)		
EPS1FMN	Mean of all FY1 estimates received in the last four weeks	EPS2FMN, EPSI1FMN, EPSI2FMN
EPS1FNE	Total number of FY1 estimates received in the last four weeks	EPS2FNE, EPSI1FNE, EPSI2FNE
EPS1FSD	Standard deviation of all the FY1 estimates received in the last four weeks	EPS2FSD, EPSI1FSD, EPSI2FSD

Price related and capital change/dilution factor data types

Mnemonic	Description
IBDY	<ul style="list-style-type: none"> Dividend yield A measure of the rate of return on annual cash dividend income Calculated from annualized dividend rate and last price for company: $IBDY = 100 * ANDIV / IBP$
IBNOSH	<ul style="list-style-type: none"> Number of shares outstanding, in millions A measure of the amount of stock that can be publicly traded For US companies IBNOSH is the actual number of shares outstanding less treasury stock. For non-US companies IBNOSH is the total number of shares outstanding.
IBP	<ul style="list-style-type: none"> The I/B/E/S price IBP is not a Datastream sourced price. It is updated weekly at the usual I/B/E/S weekly update time and is used in all calculations of I/B/E/S PE ratios and dividend yields.
IBPDTE	<ul style="list-style-type: none"> Price Date The date that the price was last amended/reviewed Returned in either American (MM-DD-YY) or European (DD/MM/YY) format
ANDIV	<ul style="list-style-type: none"> Indicated annual dividend For US companies ANDIV is the last quarterly dividend multiplied by four. Dividend is in the same currency as the earnings forecasts. Displayed to two decimal places
SPLDTE	The date on which a stock split occurred

SPLFCT	The adjustment factor applied to the stock's per share values as a result of a stock split
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Chapter 8 Glossary

This glossary is intended to aid your understanding of the financial and statistical data types, included or derived, in the I/B/E/S database. The definitions are arranged alphabetically by name. Where appropriate, related data types are given in brackets after the glossary entry. Linked terms within a definition indicate that the term is itself defined in the glossary.

Term	Definition
Absolute Surprise	See Unanticipated EPS
Annualized Dividend Rate (ANDIV)	An indicated annual dividend payment based on the last quarterly dividend. The Annualized dividend rate is calculated by multiplying the last quarterly dividend declared by four, plus recurring extra or special year-end dividends. The Annualized dividend rate has empirical validity for a company that pays a consistent amount regularly.
Average EPS estimate (EPS1MN, EPS2MN etc.)	A composite forecast of earnings per share that distills all available Current EPS estimate data for the specified fiscal time period into a single expectation. Gains from combining security analysts' forecasts arise from using more information in the aggregate than is used by any individual, and from the reduction of individual analysts' forecasts error through diversification. The Average EPS estimate is commonly known as the "consensus forecast". It is calculated by the adding the Current EPS estimate data for the specified fiscal time period from all Contributing Firms and dividing this figure by the number of EPS estimates that enter into the calculation.
Adjusted Funds For Operations (AFO)	The Adjusted Funds from Operations (AFFO) of a Real Estate Investment Trust (REIT), though subject to varying methods of computation, is generally equal to the trust's funds from operations (FFO) with adjustments made for recurring capital expenditures used to maintain the quality of the REIT's underlying assets. Thomson Reuters will consider Funds Available for Distribution (FAD), Cash Available for Distribution (CAD) and Adjusted Funds from Operations (AFFO) to be used interchangeably.
Book Value Per Share (BPS)	Book Value Per Share is the net asset value of a company's securities, expressed in per share terms. The calculation of BPS in general form involves taking the total assets of a company and subtracting all intangible assets as well as current and long-term liabilities and dividing by the weighted average number of shares outstanding.
Calendarised Amount	An aggregate number for the specified data item. Because the annual accounting period is not the same for all companies, a calendarisation procedure is used to enhance the comparability of the company data that is being aggregated. Depending on the calendar month of production and the current fiscal year end date for the Company, the average EPS estimate for the Current fiscal year is assigned to either the previous, present, following, or succeeding calendar year time period.
Capital Expenditure (CAP)	Funds used by a company to acquire or upgrade physical assets such as property, industrial buildings, or equipment or the amount used during a particular period to acquire or improve long term assets such as property, plant, or equipment.
Cash Earnings Per Share (CSH)	Cash Earnings per Share is a company's net income, plus depreciation, plus amortization of goodwill, intangibles, and prepaid assets (non-cash items), divided by weighted or diluted number of shares outstanding. Thomson Reuters provides both expected and actual CSH data (where available).

Cash Flow Per Share (CPS)	A corporation's cash flow from operations, before investing and financing, divided by the weighted average number of common shares outstanding for the year. Investing includes the sale or purchase of land, factories, buildings etc. Financing includes dividend payments, loan proceeds and sale of stock. I/B/E/S expects to provide both actual and expected CPS data where available.
Change in the current EPS estimate	The difference between the Current EPS estimate for the specified fiscal time period and the amount for the data item on the previous month's production date.
Coefficient of Variation (EPS1CV etc.)	A measure of the relative scatter, about the Average EPS Estimate, in the values for the Current EPS estimates for the specified fiscal time period. For a Company, it is the ratio of Estimate Dispersion to the Average EPS estimate. The generalised form of the equation used to calculate the coefficient of variation is: Coefficient of variation % = (Standard deviation/Absolute value of mean) * 100
Company (NAME)	The name of the individual firm that is the issuer of the equity security contained in the I/B/E/S database.
Consensus Forecast	See Average EPS Estimate.
Consolidated Earnings Per Share (PNTCON)	A measure of profitability of a group of affiliated corporations that treats the group as a single unit. The net income from operations of the parent Company, of subsidiaries, and of firms in which the parent Company holds more than 20%, enters into the computation of Consolidated earnings per share. Whenever it is appropriate, all Current EPS estimates reflect the outlook for Consolidated earnings per share only in order to maintain their comparability.
Country (IBCTRY)	The nation where the corporate headquarters for the Company is located.
Currency (IBCUR)	The monetary unit in which the earnings per share forecasts, results and other related fiscal data are stated. The codes issued by the International Standard Organization (ISO) are used to identify the currencies in most cases.
Current Fiscal Year (EPS1YR)	The accounting period of twelve months regarded as the latest because there has not yet been an announcement of the Company's annual fiscal results, even though the Company may have already closed its books.
Dilution Factor (DILFACT)	A measure of the difference between primary and fully diluted earnings per share amounts. The Dilution factor is expressed as a percentage and is the ratio of Last Fiscal Year to a recalculation of the Last fiscal year EPS by converting all convertible securities. Whenever it can be shown that the basis for the Current EPS estimate for the Company is inconsistent with the others that are available, it is adjusted by the amount of the Dilution factor to enhance its comparability.
Dividends Per Share (DPS)	A corporation's common stock dividends on an annualised basis, divided by the weighted average number of common shares outstanding for the year. In the U.S. DPS is calculated before withholding taxes. For some non-U.S. companies DPS is calculated after withholding taxes. I/B/E/S provides both actual and expected DPS data where available.
Downward Revision Rate	A measure of pessimistic sentiment. The Downward revision rate is the ratio of the number of Current EPS estimates for the specified fiscal time period that were reduced during the past month to the Number of EPS Estimates. The Downward revision rate is expressed as a percentage.

Earnings Before Goodwill (EBG)	EBG measures a company's per share earnings before the amortization of goodwill. In some countries (France, for example) goodwill is treated as a part of ordinary income for companies and the amortized component of goodwill is added back to yield earnings before goodwill amortization. This is distinguished from the EPS measure, which is earnings per share that always deducts the goodwill amount and is thus an expression of per share earnings after goodwill amortization. EBG is thus a corporation's net income from continuing operations before goodwill amortization divided by the weighted average number of shares outstanding. I/B/E/S provides both expected and actual EBG data (where available).
EBIT (Earnings Before Interest and Taxes)(EBT)	Represents the earnings of a company before interest expense and income taxes paid. As such, EBIT is a gauge of corporate earnings before any debt servicing to creditors (including bondholders) and the payment of corporate taxes. It is calculated in general form by taking the pre-tax corporate income of a company, adding back interest expense on debt, and subtracting any interest capitalized. I/B/E/S provides both expected and actual EBIT data (where available). Displayed in whole number terms in millions or billions dependent on domicile of country.
EBITDA (Earnings Before Interest, Taxes, Depreciation, and Amortization)(EBD)	EBITDA gauges the raw earnings power of a company before debt servicing, corporate taxes, and any allowances made for depreciation and amortization costs the company faces. It is calculated in general form by taking the pre-tax corporate income of a company, adding back any depreciation and amortization costs charged, plus any interest expense on debt (subtracting any capitalized interest). I/B/E/S provides both expected and actual EBITDA data (where available). Displayed in whole number terms (millions).
EBITDA (Earnings Before Interest, Taxes, Depreciation, and Amortization Per Share)(EBS)	EBITDA per share represents EBITDA divided by the weighted average number of shares outstanding. Thomson Reuters provides both expected and actual EBS data (where available).
Enterprise Value (EVT)	Enterprise Value is calculated as market capitalization plus debt, minority interest and preferred shares, minus total cash and cash equivalents. Cash equivalents are defined as an item on the balance sheet that reports the value of a company's assets that can be converted into cash immediately. Examples of cash and equivalents are bank accounts, marketable securities and treasury bills. An Enterprise Value actual is calculated using the closing price at the end of the fiscal period.
EPS Estimate Range (EPS1HI, EPS1LO etc.)	A measure of the variation in the set of Current EPS estimates. The EPS estimate range is given by the highest Current EPS estimate and the lowest Current EPS estimate values.
Estimate Dispersion (EPS1SD)	A statistical measure of the scatter in the Current EPS estimate amounts for the specified fiscal time period. Estimate Dispersion is based on deviations of Current EPS estimates and is therefore expressed in the same units. It is the standard deviation of the variance in the Current EPS estimate for the specified fiscal time period.
Expected EPS Long Term Growth Rate (LTMD)	A composite forecast of the anticipated annual growth rate in earnings per share over the "longer term". The Expected EPS long term growth rate is the median or middle Current EPS estimate or by convention, the average of the two middle values. I/B/E/S Inc. requests that each Contributing firm focus on the five-year time interval that begins on the first day of the Current Fiscal Year and make their calculations based on projections of EPS before extraordinary items.
Final Average EPS Estimate (SURMN)	The Average EPS Estimate for the specified fiscal time period on the day prior to the Latest Interim Reporting Date for the Company.
Fiscal Periods (FY0, FY1, FY2...)	A company's last reported annual earnings period is referred to as FY0. The period end dates for all estimated periods are then based on FY0. If FY0 corresponds to the December 1996 year end, the FY1 mean estimate is for December 1997 and the FY2 mean estimate is for the period ended December 1998.

Five Year Historical EPS Growth (YR5GTH)	<p>The average annual earnings per share growth for a company over the past five years. The average annual growth in EPS for the past five years is calculated by measuring the slope of a log-linear line fit to the reported earnings. It is expressed as a percentage. If quarterly data is available, the line is fitted to the last 21 observations of rolling four quarter EPS. The resultant growth (slope) is raised to the fourth power to obtain an annualized growth factor. If semi-annual data is available, the curve is fitted to the last 11 observations of the semi-annual data. The resultant growth (slope) is raised to the second power to obtain the annual growth factor. If only annual observations are available, the curve is fitted to the last 6 annual observations (5 time periods) and the slope is used to represent the growth factor. Zero and negative observations are excluded from the calculations.</p>
Five Year Historical EPS Stability	<p>Five-year earnings per share stability measures the consistency of earnings per share growth over the past five years. The lower the number, the more uniform growth has been. Combined with earnings growth data, the stability figure provides a multi-dimensional view of earnings growth over the past five years. Earnings stability is calculated as the mean absolute percentage difference between actual reported earnings per share and a five year historical EPS growth trend line, expressed as a percentage of trend line earnings per share. The Five Year Historical EPS Stability is calculated as follows:</p> $Stability = \sum_{i=1}^{i=n} \left(\frac{\left(\frac{Earnings(x_i) - Trend(x_i)}{Trend(x_i)} \right)}{n} \right)$ <p>where:</p> <p>Earnings(xi) = actual reported earnings for occurrence i Trend(xi) = calculated earnings per trend line = $a * e^{b * x_i}$ (trend point for the ith period n = number of observations</p>
Flash Mean EPS Estimate (EPS1FMN, EPS1FNE, EPS2FMN, EPS2FNE etc.)	<p>A composite forecast of earnings per share for those values of the Current EPS estimate for the specified fiscal time period that have been revised during the past four weeks. The Flash-mean EPS estimate for a Company is calculated by adding the Current EPS estimates for the specified fiscal time period that have been revised during the past four weeks, and dividing this sum by the Number of EPS Estimates that entered into the calculation. The accuracy of the Flash-mean EPS estimate is expected to be greater than other composite forecasts because it incorporates new information more effectively.</p>

Four Week Rolling Data.	<p>(EPS1DN4W, EPS1UP4W... EPS4DN4W, EPS4UP4W) All such data items are calculated using a rolling four week time frame, as described below. The I/B/E/S weekly cycle takes place on every Thursday. At that point, all one month ago values shift to reflect the state of the database as it existed on the Thursday exactly four weeks prior. One month percentage change values are then calculated by comparing the current data to this base number. For daily products, even though the current number may change as daily updates are received, the base number will remain the same until the next weekly run, when it will shift one week forward. For Example, if EPS revisions for a company are received on a Monday, the one month percent change in the mean is calculated by comparing the current mean and the mean as it existed four weeks AND two days prior. If additional revisions were received on Tuesday, the period would be four weeks and three days. Hence, if daily revisions are made on a company, the time period used in the one-month percentage change calculations may be greater than four weeks. However since the base period is re-set every Thursday, it will never reach five weeks. The number of estimates raised and lowered are calculated in the same manner. These estimates include all estimates which have been received, but which may have been excluded from the mean calculations for a variety of reasons such as using different accounting rules. The data types based on week on week change (EPS1DNW, EPS1UPW etc.) work in the same manner. The data types based on monthly changes (EPS1UP, EPS1DN etc.) are based on the change between I/B/E/S monthly periods and are updated on a monthly basis only. They are not updated on a daily basis.</p>
Free Cash Flow Per Share (FCF)	<p>A measure of financial performance calculated as operating cash flow minus capital expenditures, Free Cash Flow (FCF) represents the cash that a company is able to generate after laying out the money required to maintain or expand its asset base.</p>
Fully Diluted Earnings Per Share (DILFCT)	<p>A measure of Company profitability that shows the result of potential dilution on the computation of earnings per share amounts. Common stock equivalents whose conversion, exercise or contingent issuance is potentially dilutive, and the Number of shares outstanding enter into the computation of Fully diluted earnings per share. A Current EPS estimate is shown as a Fully diluted earnings per share amount whenever there is a need to maintain its comparability with the others for the Company.</p>
Funds From Operations (FFO)	<p>A measure used by real estate and other investment trusts to define the cash flow from trust operations. It is earnings with depreciation and amortization added back. A similar term increasingly used is Funds Available for Distribution (FAD), which is FFO less capital investments in trust property and the amortization of mortgages. I/B/E/S provides both expected and actual FFO data (where available).</p>
GAAP Earnings Per Share (Fully reported) (GPS)	<p>Fully Reported Earnings per Share are statutory or reported earnings per share, defined as net profit (on continuous activities) divided by the weighted average number of shares outstanding during the period. Where a company carries exceptional items or goodwill amortization, this measure is post-exceptional, post-goodwill. In North America this figure is referred to as GAAP Earnings per Share and is calculated according to Generally Accepted Accounting Principles (GAAP), which is reported in SEC filings. In countries that have adopted International Financial Reporting Standards (IFRS) this figure will include all items according to IFRS rules. Thomson Reuters provides both expected and actual GPS data (where available).</p>
Gross Margin (Gross Profit Margin) (GRM)	<p>A company's total sales revenue minus cost of goods sold, divided by the total sales revenue, expressed as a percentage.</p>
Growth Rate in EPS Through The Current Fiscal Year	<p>The rate of change in earnings per share over the five-year period that ends on the Current fiscal year end date. The Growth rate in EPS through the current fiscal year is derived by fitting a least squares growth line to the logarithms of 20 values of rolling annual earnings per share for each Company.</p>

Highest EPS Estimate	The largest Current EPS estimate for the specified fiscal time period.
Industry (IBIND)	The description of the homogenous group of companies with similar business lines to that of the Company. I/B/E/S maintains its own proprietary classification system which segregates companies at three different levels (Sector, Industry, Group). Sectors are subdivided into Industries which are in turn subdivided into Groups. The U.S. Industries are loosely based on the S&P 500 industry classifications and the classification system for non-US companies is similar to the Morgan Stanley Capital Index. In addition, I/B/E/S provides several reports that are based on specialty classification schemes such as the Toronto Stock Exchange 300 and the Dow Zones Equity Index.
Interim EPS (I1MN, I2MN etc.)	The quarterly or semi-annual earnings per share for the Company that was announced for the specified interim fiscal time periods. Interim EPS is expressed in general on a primary basis excluding extraordinary items and discontinued operations, and is adjusted for all stock splits and dividends.
Interim Period (I1YR, I2YR etc.)	The accounting period of less than 12 months (typically quarterly or semi-annually) for the Company over which fiscal results are announced.
Last Fiscal Year (F0YR)	The previous accounting period of 12 months for which the books of the Company have been closed, and its annual fiscal results already announced.
Last Fiscal Year EPS (F0EPS)	The earnings per share for the Company announced for the Last Fiscal Year. Last fiscal year EPS is expressed in general on a primary basis excluding extraordinary items and discontinued operations, and is adjusted for all stock splits and dividends.
Last Price (IBP)	The most recent transaction price. Last price figures are rounded so that they can be expressed in terms of the nearest whole unit of the Currency.
Latest Interim Reporting Date (SURDT)	The date on which the latest announcement of interim earnings results was made. The date is expressed as day/month.
Long Term Growth Forecasts	Long Term Growth Forecasts are received directly from contributing analysts; they are not calculated by I/B/E/S. While different analysts apply different methodologies, the Long Term Growth Forecast generally represents an expected annual increase in operating earnings over the company's next full business cycle. In general, these forecasts refer to a period of between three to five years. Due to the variance in methodologies for Long Term Growth calculations, I/B/E/S recommends the median value for Long Term Growth Forecast as opposed to the mean value. The median value (defined as the middle value in a defined set of values) is less affected by outlier forecasts.
Lowest EPS Estimate (EPS1LO, EPS2LO etc.)	The smallest Current EPS estimate for the specified fiscal time period.
Market Capitalization	The aggregate value of all trading stock for the Company, whatever its ownership. It is calculated by multiplying Number of shares outstanding by Last Price. It is given in millions of currency units.
Mean Absolute Deviation	See Five Year Historical EPS Stability.

Mean EPS Estimate (EPS1MN, EPS2MN etc.)	<p>The arithmetic average of estimates for the fiscal period indicated. The mean is calculated as follows:</p> $\frac{\sum_{i=1}^n x_i}{n}$ <p>where:</p> <p style="margin-left: 40px;">xi = individual analysts forecasts n = number of estimates</p>
Median EPS Estimate (EPS1MD, EPS2MD etc.)	<p>The value that falls in the middle of the defined range of estimates when arranged in ascending order. That is, the value within the sample that has an equal number of estimates both greater and less than itself. If the sample has an equal number of estimates, it is the average of the two middle values. Median values are less affected by outlier forecasts than mean values.</p>
Naive Estimate	See Growth Rate in EPS Through The Current Fiscal Year.
Neglect	A measure of the amount of sponsorship by the investment research community. Neglect is the ratio of Market Capitalization to the Number of EPS estimates. It is expressed in millions of dollars per estimate.
Net Asset Value (NAV)	Net Asset Value is the total book value of a company's securities. It is calculated in general form by taking the total assets of a company and subtracting the value of the company's intangible assets (goodwill, patents, etc.) minus current and long-term liabilities. NAV is helpful in determining underpriced equities by indicating the ultimate value of a company's securities in the event of their liquidation. I/B/E/S provides both expected and actual NAV data (where available).
Net Debt (NDT)	Net Debt is calculated as short and long term interest bearing debt minus cash. Net debt is used to give an overall picture of a company's debt situation by applying cash against debt. I/B/E/S provides both expected and actual net debt data (where available).
Net Income (INC)	Net income is defined as a corporation's after-tax income. This item varies significantly from market to market as regards the inclusion or exclusion of non-recurring items. In most markets, non-recurring items are backed out of net income and this measure is restricted to income from continuing operations only (also referred to as normalized income). Some markets (Japan, for example) apply reported net income, including any and all extraordinary items. Recent accounting changes in still other markets (particularly Southeast Asia) have resulted in a reclassification of extraordinary versus exceptional items, bringing many formerly extraneous items above the net income line. I/B/E/S provides both expected and actual net income data (where available).
Reported Net Income (NER)	The net income earned after deducting all expenses including operating and non-operating, interest expense and income and taxation. It is inclusive of all amortization and one-time charges. Also referred to as Net Profit Reported.
Next Fiscal Year (F2YR)	The accounting period of 12 months that follows the Current fiscal year for the Company. The end date of a company's Next fiscal year is expressed as month/year.
Number of EPS Estimates (EPS1NE, EPS2NE etc.)	The total number of estimates for a company for the specified time period.
Number of Estimates Lowered	The number of estimates that have been lowered (from their previous values) over the last week, four weeks, and month. New estimates and multiple estimate changes are not counted in this sum. For example, if during a four week period, an analyst raises their estimate from 1.50 to 1.90, and then lowers that estimate from 1.90 to 1.75, it is counted as one estimate lowered, because only the immediate prior estimate is used in the calculation.
Number of Estimates Raised	The number of estimates that have been increased (from their previous values) over the last week, four weeks, and month. New estimates and multiple estimate changes are not counted in this sum. For example, if during a four week period, an analyst lowers their estimate from 2.50 to 2.10 and then revises that estimate from 2.10 to 2.30, it is counted as one estimate raised, because only the immediate prior estimate is used in the calculation.

Number of Shares Held (IBNOSH)	A measure of the amount of common stock that can be publicly traded. For a U.S. Company, the Number of shares outstanding is the actual Number of shares outstanding less treasury stock. For a non-U.S. Company, the Number of shares outstanding is generally the actual Number of shares outstanding. The Number of shares outstanding is given in millions of shares.
Operating Profit (OPR)	Operating Profit is the difference between a company's revenues and its costs and expenditures arising directly out of a company's regular operations. Operating Profit is calculated before any deductions in income owing to non-operating activities (generally such items as interest expense, corporate tax payments, material gains or losses arising from changes in accounting policy, and the like) and excludes any income derived from outside the firm's regular activities. I/B/E/S provides both expected and actual OPR data (where available). Displayed in whole number terms (millions).
Option Expenses	The Security and Exchange Commission's ruling on the expensing of stock options – FAS123(R) for US publicly traded companies was introduced on December 16, 2004. This requires North American companies to calculate and amortize stock option expenses through the income statement for fiscal years beginning after June 15, 2005. Stock option expenses are only included in the EPS mean when the majority of contributing analysts have included the expenses in their estimates.
Parent Company Earnings Per Share (PNTCON)	A measure of the profitability of the parent Company that is the owner of a group of affiliated corporations. The net income from operations of the parent Company, and dividends, interests, royalties, etc. received from its subsidiaries enter into the computation of Parent company earnings per share. Whenever it is appropriate all Current EPS estimates reflect the outlook for Parent company earnings per share only in order to maintain their comparability.
Pre-Tax Profit (PRE)	Pre-tax profit is a company's net income before tax expense. Where applicable, extraordinary items and non-recurring charges are subtracted from net income. Thomson Reuters provides both expected and actual PRE data (where available). • In Japan, companies compliant with Japan Accounting Standards use Recurring Profit.
Reported Pre-Tax Profit (PRR)	The pre-tax profit reported by the company inclusive of all amortization and one-time charges. Also referred to as Pre Tax Profit Reported. Excluding for one-off cases, the GAAP Pre Tax Profit excludes the effect of discontinued operations for all regions.
Price Date (IBPDTE)	The date on which the most recent transaction took place. The Price date is expressed as day/month.
Price Range	The absolute high and low price per share over the latest 52 week period.
Price/Earnings Ratio (EPS1PER, EPS2PER etc.)	A widely used stock evaluation measure. The Price/Earnings ratio is calculated by dividing the Last I/B/E/S price by the Average EPS Estimate for the specified fiscal time period.
Primary Earnings Per Share (DILFCT)	A measure of Company profitability that excludes all common stock equivalents whose conversion, exercise or contingent issuance is potentially dilutive in the computation of earnings per share amounts. A Current EPS estimate will be shown as a Primary earnings per share amount whenever there is a need to maintain its' comparability with the others for the Company. When the letter "D" does not follow the Dilution Factor or the Last Fiscal Year it indicates that Primary earnings per share amounts are being presented, or enter into the calculations.

Production Cycles	<p>There are several ways to refer to the I/B/E/S monthly cycle dates, all of which refer to the same date. The most frequent definitions of the I/B/E/S run date are: The Thursday that falls between the 14th and 20th of each month. The Thursday before the third Friday of the month. The Thursday of the week in which options expire. The rationale for this mid-month date comes from earlier days when most brokerage research was released by US Mail on the first of the month. The two week lead time was necessary to process, print and ship the data to clients. Today, information is processed overnight and delivered for the start of the next business day. The I/B/E/S weekly cycle ends on the Thursday of each week.</p>
Recommendations	<p>As many brokers have different ratings, I/B/E/S maintains a standard set of recommendations, each with an assigned numeric value. Each recommendation received from the contributors is mapped to one of the I/B/E/S standard ratings. Assigning a numeric value to the broker text enables a consensus recommendation to be calculated. The consensus recommendation appears as the mean of the assigned values as well as text. The consensus text is determined by rounding the mean value to the nearest integer and matching it to the corresponding I/B/E/S text.</p>
Relative Surprise	See Unanticipated EPS.
Return on Assets (ROA)	<p>Return on Assets is a profitability ratio and as such gauges the return on investment of a company. Specifically, ROA measures a company's operating efficiency regardless of its financial structure (in particular, without regard to the degree of leverage a company uses) and is calculated by dividing a company's net income prior to financing costs. I/B/E/S provides both expected and actual ROA data (where available).</p> $ROA (\text{Return on Assets}) = \frac{\text{Net Income} + \text{After tax interest cost}}{\text{Average Total Assets}}$
Return on Equity (ROE)	<p>Return on Equity is another profitability ratio which gauges return on investment by measuring how effectual stockholder money is being employed by the company. ROE is calculated by dividing a company's net income by average total equity. Unlike ROA, ROE does consider the degree to which a company uses leveraging, as interest expense paid to creditors is generally deducted from earnings to arrive at Net Income. I/B/E/S provides both expected and actual ROE data (where available).</p> $ROE (\text{Return On Total Equity}) = \frac{\text{Net Income}}{\text{Average Total Equity}}$
Sales (SAL)	<p>The Sales measure is a corporation's net revenue, generally derived from core business activities. For non-financial companies, the calculation of net revenue (or net turnover) in most markets generally involves subtracting transportation and related operational costs from gross revenue/sales. Revenue recognition practices vary significantly from market to market, though generally the recording of revenue is based upon sales invoices issued (or anticipated for forecast purposes) during the accounting period. For banks, revenue is generally defined as net interest income plus net non-interest income. Net interest income is defined as interest income minus interest expenses. Net interest income components generally include net interest earned on loans, reserve deposits and deposits with other banks, and net interest earned from interbank money market operations (IMMO) and marketable securities. Net non-interest income components generally include net income from fees and commissions, net gains from Capital market and foreign exchange operations, and net income earned from participations. For insurance companies, revenue is generally defined as net technical income plus net financial income. Net technical income is generally defined as technical income minus technical expenses. Technical income components generally include income from premiums and commissions received reinsurer's share of claims paid, transferred net technical reserves, and reinsurer's share of technical reserves. Net financial income is generally defined as financial income minus financial expenses. Net financial income components generally include net interest income, net dividend income, and net foreign exchange gains. I/B/E/S provides both expected and actual SAL data (where available).</p>

Sector (IBSCT)	<p>The description of a homogenous group of industries that make up a major subset of the market.</p> <p>I/B/E/S maintains its own proprietary classification system which segregates companies at three different levels (Sector, Industry, Group). Sectors are subdivided into Industries which are in turn subdivided into Groups. Both the US and non-US databases comprise 11 sectors. I/B/E/S also provides a special report for Canadian companies based on the sector breakdown of the Toronto Stock Exchange 300 which has 14 Sectors.</p>
Standard Deviation	<p>The statistical measure of dispersion of estimates for the fiscal period indicated. The standard deviation is the average variance from the mean expressed in local currency.</p> <p>The Standard Deviation is calculated as follows:</p> $\sqrt{\frac{\sum (x - \bar{x})^2}{n - 1}}$ <p>where:</p> <p style="margin-left: 40px;">x = individual analysts estimate n = number of estimates</p>
Standardized Unanticipated Earnings (SUE) Score	See Unanticipated EPS.
Tangible Book Value Per Share (TBV)	<p>The Tangible Book Value per Share is the company's Shareholders Equity excluding Minority Interests adjusted for certain items and divided by the Shares in Issue at Year End. While the Book Value per Share is provided on a reported or GAAP basis, Tangible Book Value per Share estimates would include adjusted BVPS estimates. The adjustments include revaluations of assets, exclusion of Accumulated other comprehensive income (AOCI), Embedded Value inclusions and others.</p>
Timely Composite Differential	<p>A measure of the amount of new information incorporated in more recent Current EPS estimate updates compared to older ones. The Timely composite differential is the ratio of the Company's flash mean EPS estimate for the specified fiscal time period to the Average EPS Estimate. It is expressed as a percentage.</p>
Trend Line EPS Forecast	<p>A mechanically determined forecast of earnings per share for the specified fiscal time period, based on the assumption that the future is a simple extension of the past. It is calculated by fitting a least squares growth line to the logarithms of the 20 most quarterly observations of last twelve month EPS. The Trend Line EPS Forecast is given by extrapolating the derived growth line to the end of the specified fiscal time period.</p>

Unanticipated EPS (SURPD, SURPP, SUE)	<p>A measure of earnings surprise that shows the amount by which the latest announcement of earnings per share for the Company was better or worse than expected. Unanticipated EPS is derived by comparing the latest Interim EPS to the Final Average EPS Estimate for the interim period.</p> <p>Absolute surprise is calculated by taking the mathematical difference between the two data items.</p> <p>Relative surprise is calculated as the percentage difference between the two data items.</p> <p>A third gauge, called the Standardized Unanticipated Earnings (SUE) score is calculated as the ratio of absolute surprise to Estimate Dispersion. The SUE score measures the number of standard deviations the actual (reported) earnings that differ from the I/B/E/S surprise mean estimates for a company for the fiscal period indicated. SUE can be used to make probability statements about the likelihood of that particular result occurring. The SUE score is calculated as follows:</p> $SUE = \frac{\text{Actual EPS} - \text{Surprise mean EPS}}{\text{Standard deviation}}$
Upward Revision Rate	<p>A measure of optimistic sentiment. The Upward revision rate is the ratio of Current EPS estimate amounts for the specified fiscal time period that were increased during the past month to the Number of EPS Estimates. It is expressed as a percentage.</p>
Yield	<p>A measure of the rate of return on annual cash dividend income. Yield is the ratio of the Annualized Dividend Rate to the Last Price for the Company and is expressed as a percentage.</p>