TEJ Quick Start Guides

1 • Download, install, log in (Intranet & internet) 〔TEJ+〕 P 2 ~ 3

2 • TEJ Main + Introduction to TEJ Program P 4 ~ 22

3 • TEJ introduction to Event Study System P 23~ 34

4 • Excel VSTO-TEJ Smart Wizard P 35~ 50

5 • Contact TEJ

If you have any technical questions about our services, please feel free to call TEJ business department at (02) 8768-1088#120 or email us at tej@tej.com.tw

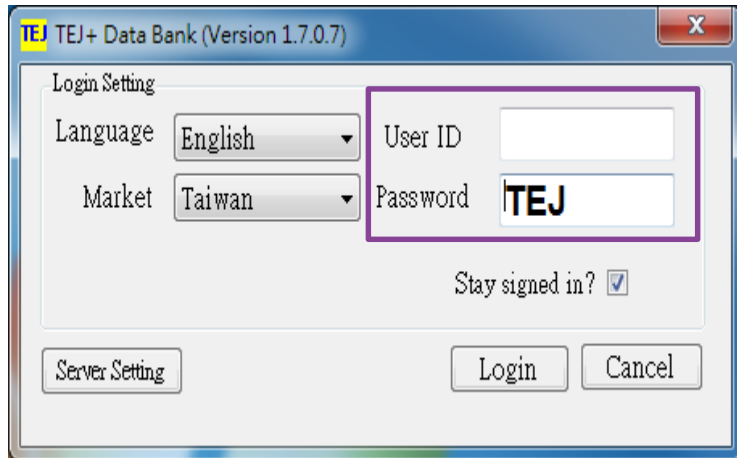# Download, Install, Contact information

Step1：http://

Step2：

Step3：

Step4：

Log in: **Click Desk Shortcut**

Intranet

Enter account and password and click log in.

Internet

Intranet login window:

TEJ+ Data Bank (Version 1.7.0.7)
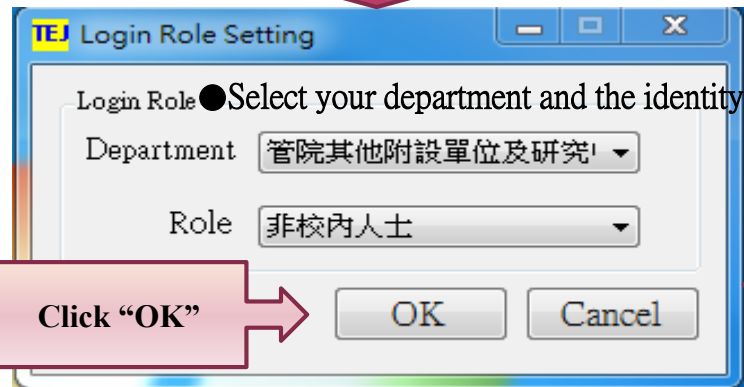
Login Setting
- Language: English
- Market: Taiwan
- User ID: [ ]
- Password: TEJ
- Stay signed in? ☑
- Server Setting | Login | Cancel

Login Role Setting
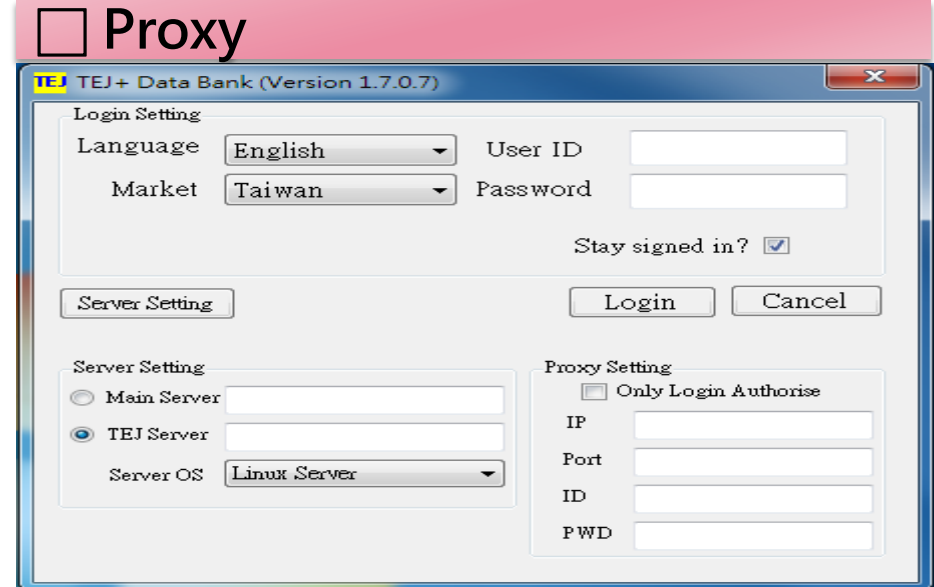
●Select your department and the identity

- Department: 管院其他附設單位及研究! ▼
- Role: 非校內人士 ▼

Click "OK" → OK | Cancel

☐ **Proxy**

TEJ+ Data Bank (Version 1.7.0.7)

Login Setting
- Language: English
- Market: Taiwan
- User ID: [ ]
- Password: [ ]
- Stay signed in? ☑
- Server Setting | Login | Cancel

Server Setting
- ○ Main Server [ ]
- ● TEJ Server [ ]
- Server OS: Linux Server ▼

Proxy Setting
- ☐ Only Login Authorise
- IP: [ ]
- Port: [ ]
- ID: [ ]
- PWD: [ ]

☐ **EZ Proxy**

EzProxy 認證
- 帳號 [ ]
- 密碼 [ ]
- 確定 | 取消

☐ **VPN**

TEJ Quick Start Guides

1 • Main Menu: Data Base Categories(take Taiwan as an example, the numbers of download items are subject to the DB purchase agreement made by each school.)

2 • Home screen & Introductions to common features

3 • Review mode (individual stock, multiple stocks, single item comparison)

4 • Criteria setting(company groups, field groups, advanced date)

5 • Export saved information

6 • Auxiliary functions (drawing, technical manual, study related articles)

Main Menu: DB Categories (I)

TEJ Profile	• Macroeconomics, raw material, exchange rate, interests, etc.
TEJ Company	• Company monthly revenues/earnings, sales breakdown, board members, capital formation, long term and short term investment, borrowings, etc.
TEJ Finance	• Financial information, financial ratios data base, consolidated financial statements and financial restatements of listed and GRETAI listed companies.
TEJ New Finance	• In response to the Statement of Financial Accounting Standards (SFAS) No.34 & the Statement of Financial Accounting Standards (SFAS) No. 36 as well as the cumulative effects of the new statement, the financial disclosures begin on or after 1 January 2006 and can be referred back to as early as 2005.

Main Menu: DB Categories (I)

Banking Industry- Balance Sheet Detail of Assets/Liability	• The regulatory capital, assets quality, regulatory capital detail, capital adequacy ratio, etc. of the financial industry.
TEJ Financial Holding Zone	• Including the monthly revenue, sales breakdown, reinvestment and financial statements of the financial holding companies and its subsidiaries.
TEJ Equity	• Securities market DB, including stock price, deal on credit (margin purchase and short sale), foreign institutional investors, security deposited in central depository, and etc.
TEJ IFRS Finance	•The financial Statements of Taiwan's listed and GRETAI listed Companies' adhere to the financial statements released by International Financial Reporting Standards (IFRS), the financial disclosures begin on or after 1 January 2013 and can be referred back to as early as 2012.

Main Menu: DB Categories (II)

Financial Derivatives	• Basic information and day trading data for Warrants, Callable Bull-Bear Contracts, Futures and Options.
Market Multifactor	• Based on calculation of the Multi-Factor Model of Fama & French, it provides 8 factors analysis, including Market Risk Premium, Size Premium, BE/ME Ratio Premium, and etc.
TEJ Audit Quality	• Required variants that affect and evaluate the audit quality and accountancy firms' information are included.
TEJ Company Governance	• Formed by public corporations, controlling shareholding, deviation, structure of directors and supervisors, directors and supervisors' salaries and independent director and supervisor, and etc.

Main Menu: DB Categories (II)

TEJ FUND	• Fund DB, including fund attributes, net worth, shareholding by week/month, ratings, turnover ratio, news and etc.
TEJ BOND	• Domestic Bond, Corporation Bond, Convertible Bond and ECB information materials.
TEJ PUB	• Database for public companies, including financial reports and ratio, stock price, shareholding by board of directors, monthly revenue, capital formation and etc.
TEJ Bank	• Financial institute DB of business sub-items, including bank deposits analysis, bank loans analysis and etc

Home screen & Introductions to common features

Export data

Criteria setting

Review mode

Drawing

News

Font-size-adjust

Main menu of DB

9

Review Mode (I): Single Company (individual stock)
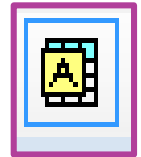
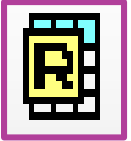▸ For example, searching for HTC's revenue-related financial information from 2009 to 2011.
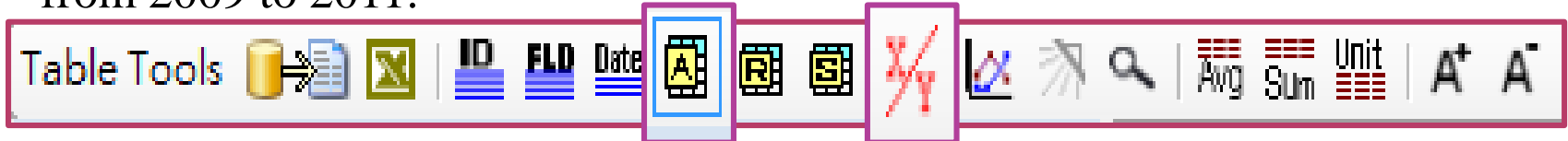
1. individual stock overview
(X Axis: field; Y Axis: time)

| 2498 HTC | Query Date 200901-201112 | Date Sorting | Data Ran; |

IFRS_TEJ Consolidated First Financial_General(Acc)-4 (Company View)←Description

	YYYY/MM △	Total cash and cash equivalents ◊	financial assets at fair value through ◊	Finar Availal
1	2009/03	72,610,219	0	
2	2009/06	68,903,724	0	
3	2009/09	55,878,298	0	
4	2009/12	64,638,290	18,132	
5	2010/03	69,727,128	68,325	
6	2010/06	78,494,772	96,994	
7	2010/09	68,477,628	0	
8	2010/12	74,462,861	450,276	
9	2011/03	94,828,263	0	
10	2011/06	115,707,444	0	
11	2011/09	104,820,790	220,609	
12	2011/12	87,501,508	256,868	

2. Cross-period comparisons
(X Axis: time; Y Axis: field)

| 2498 HTC | Query Date 201101-201303 | Date Sorting | Data Ran; |

IFRS_TEJ Consolidated First Financial_General(Acc)-4 (Across Period View)←Description

	Field Name ◊	2011/03	2011/06	20
1	Total cash and cash equi	94,828,263	115,707,444	
2	Total current financial a	0	0	
3	Financial Assets Availab	442,557	733,446	
4	Held-To-Maturity Finan	0	0	
5	Current derivative financ	0	0	
6	Current financial assets a	0	0	
7	Current bond investmen	0	0	
8	Accounts & Notes Recei	61,757,184	69,994,288	
9	Construction contracts re	0	0	
10	Other Receivable	1,490,121	1,167,208	
11	Loan to Others - Short-T	0	0	
12	Total inventories	29,718,517	30,943,105	

Review Mode (II): Multiple Companies (multiple stocks)

▸ For example, searching for revenue-related financial information of Catcher Technology, HTC, Largan Precision Co. and F-TPK in Q4, 2014.

1. Ranking
(X Axis: field; Y Axis: company)
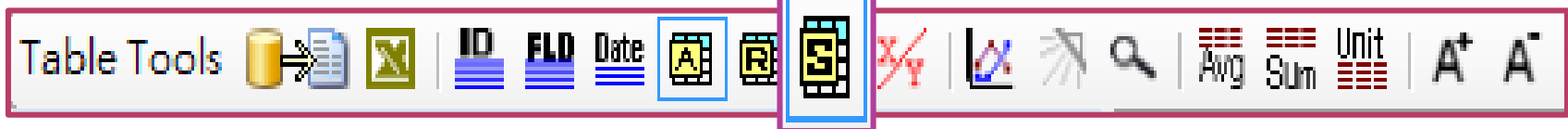
Query Date 201412 | Date Sorting ID Group ▾ Field Group ▾ Filter Group ▾

IFRS_TEJ Consolidated First Financial_General(Acc)-4 (Ranking)←Description

	CO_ID	YYYY/MM	Total cash and cash equivalents	financial assets at fair value through
1	3008 Largan	2014/12	24,100,464	0
2	3673 TPK	2014/12	29,539,623	0
3	2474 Catcher	2014/12	48,119,090	0
4	2498 HTC	2014/12	55,743,558	262,544

2. Cross-company comparisons
(X Axis: company; Y Axis: field)

Query Date 201412 | Date Sorting ID Group ▾ Field Group ▾ Filter Group ▾

IFRS_TEJ Consolidated First Financial_General(Acc)-4 (Across Company View)←Description

	Field Name	2474 Catcher	2498 HTC	3008 Largan	3673 TPK
1	YYYY/MM	2014/12	2014/12	2014/12	2014/12
2	Total cash and cash equi	48,119,090	55,743,558	24,100,464	29,539,623
3	Total current financial a	0	262,544	0	0
4	Financial Assets Availab	0	0	3,445,479	0
5	Held-To-Maturity Finan	0	0	0	0
6	Current derivative finan	0	0	0	0
7	Current financial assets a	0	0	0	0
8	Current bond investmen	18,103	7,918	0	16,736,884
9	Accounts & Notes Recei	21,027,297	29,140,284	13,337,517	13,809,555
10	Construction contracts re	0	0	0	0
11	Other Receivable	402,715	584,936	286,580	5,677,871
12	Loan to Others - Short-T	0	0	0	1,107,750
13	Total inventories	5,600,468	17,213,060	3,538,339	7,179,669
14	Current biological assets,	0	0	0	0
15	Total prepayments	511,756	6,626,106	50,806	18,558
16	Agency current-debit (fo	0	0	0	0
17	Non-current assets classi	634,185	0	0	0
18	Total current tax assets	21	274,321	0	376,172

Review Mode (III):Variant for Single Field

▸ For example, searching for Net Sales for Catcher Technology, HTC, Largan Precision Co. and F-TPK in 2011.

Single item comparison (X Axis: date; Y Axis: company)

Total cash and cash eq ▾ | Query Date | 201101-201112 ▾ | Date Sorting ID Group ▾ Field Group ▾ Filter Group ▾

IFRS_TEJ Consolidated First Financial_General(Acc)-4 (Data View)←Description

CO_ID	2011/03	2011/06	2011/09	2011/12
1	2474 Catcher	20,990,274	31,899,239	37,614,077	40,197,831
2	2498 HTC	94,828,263	115,707,444	104,820,790	87,501,508
3	3008 Largan	6,253,552	6,276,252	5,792,708	8,123,620
4	3673 TPK	5,250,654	20,486,218	14,501,132	10,382,671

Criteria Setting (I): Company Sample

▸ For example, set up Electronic Components Industry

Step 1：Select market

Step 2：Select industry

Step 3：Move the desired company to the selected ID list on the right side

Step 4：Name the group

Step 5：Click "Save in Local Storage" to save the file

▸ Note: Industry Categories are based on the classification of the Taiwan Stock Exchange. Some industries with an underline in front would be the sub-category further classified by TEJ, such as _PC System, _Motherboard, etc.

Criteria Setting (II): Field Variants

▸ For example, set up "revenue, cost, expense, net income "subjects
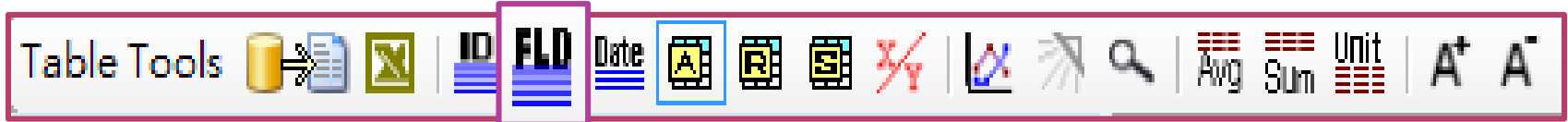
Step 1：Use "Category" and "Search" to look for the desired field and move the "Selected Field" to the right side.

Step 2：Enter a catchy name in group field name for future reference.

Step 3 : Click "Save".
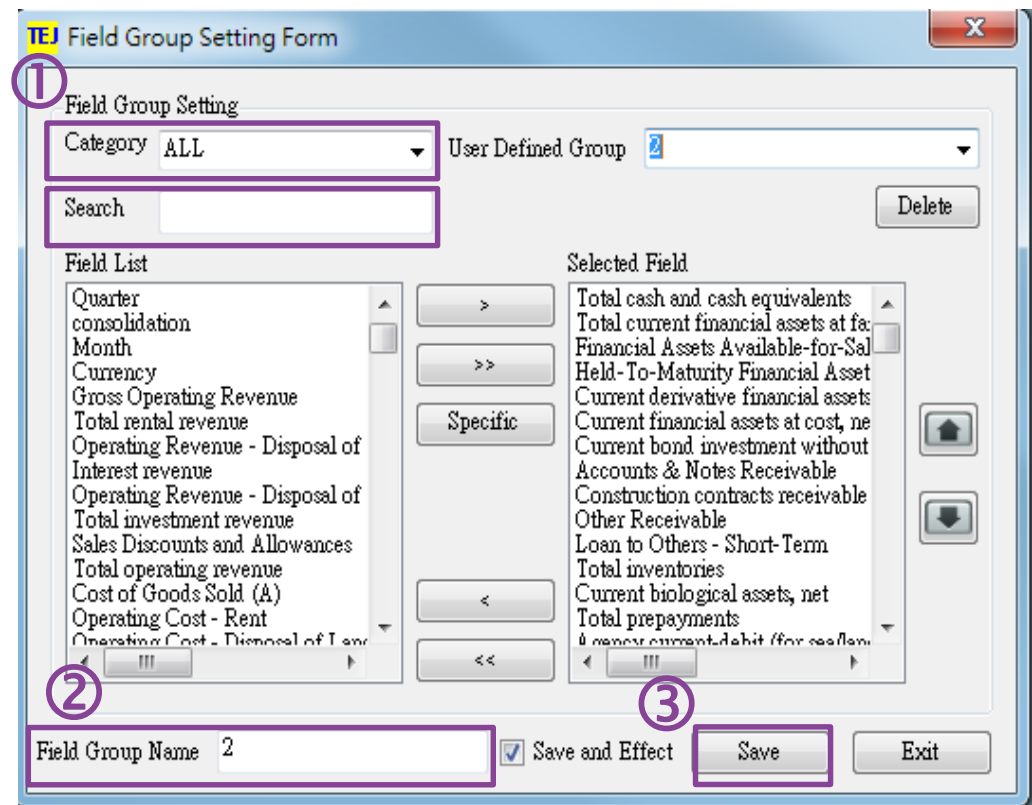
Criteria Setting (II): Date

▸ For example, set up the date by the year-end date of 2005-2011.
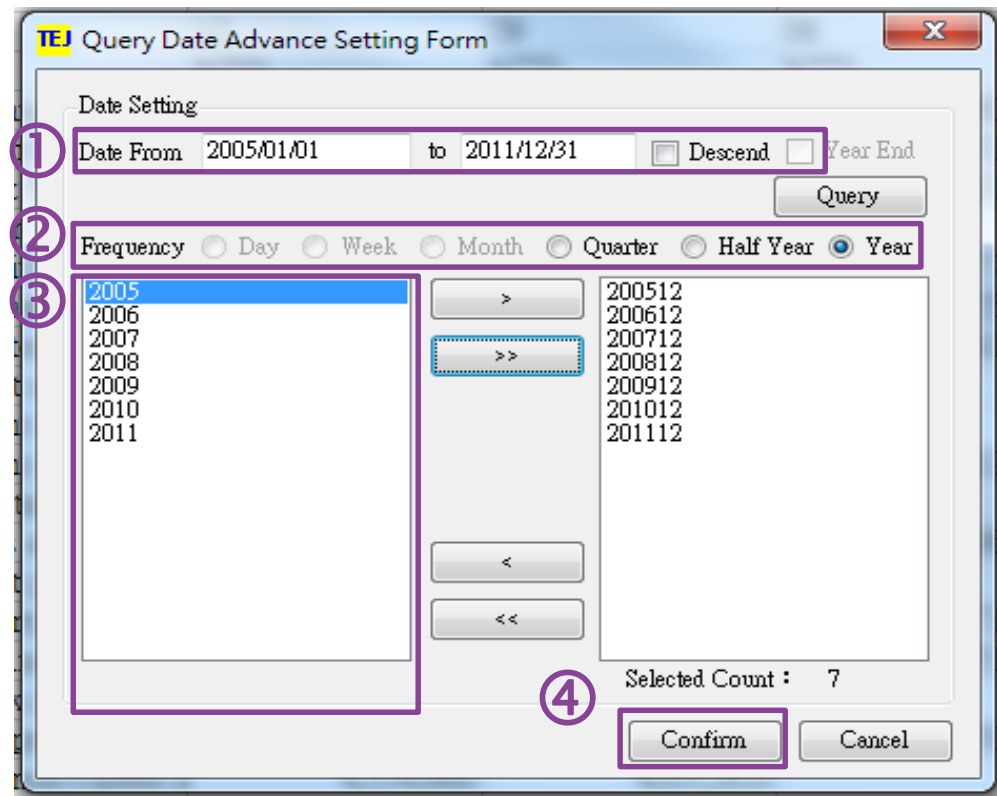
Step 1：Enter date interval (8 characters in Arabic numbers)

Step 2：Select frequency

Step 3：Move required date to the selected list on the right side.

Step 4：Click "OK".

Export Saved Data(1): Export to Excel
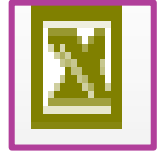
‣ For example, export HTC's financial statements from 2008-2011.
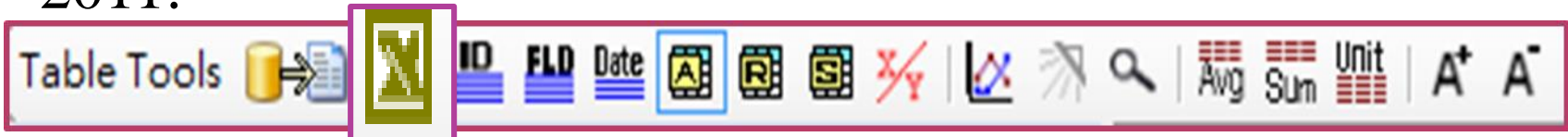
Step ：

select required

information and click

"Export" to export

selected info to Excel.

*Note: Exported info is a

temporary file, make sure to

click Save As to save the file.

Export Saved data (II): Download Filter
(download a large number of data)

Table Tools

Step 1：Select required company samples or selected ID groups.

Step 2：Select required field variants or field groups that are already set up.

Step 3：Select required date or click **Date List** to choose specific date or frequency.

Step 4：Set the route for saved data

Step 5：Click "Convert".

*Note: Please click O.K. when the below screen pops out. The numbers of company sending out together at one time will not affect the converting result.

Input number of companies tr...

No of Companies transferred per batch 398

** If failed, please decrease the number.

OK   Cancel

Export to File 「IFRS_TEJ Consolidated First(Acc)-ALL」

Select ID

ALL   ALL

000116 Jih Sun Securities
000930 Hua Nan Sec.
000960 Fubon Securities
000980 Yuanta
0009A0 SinoPac Securities
1101 Taiwan Cement
1102 Asia Cement
1103 Chia Hsin Cement
1104 Universal Cement
1108 Lucky Cement
1109 Hsing Ta Cement
1110 Tuna Cement

①

Select Field

ALL

Quarter
consolidation
Month
Currency
Total cash and cash equivalents
Total current financial assets at fa
Accounts & Notes Receivable
Construction contracts receivabl
Other Receivable
Loan to Others – Short-Term

②

Basic Data Field Setting

Market
List_date
TSE ID
TEJ Sector
TSE Sector
Fiscal Year End
Ban Code
ISIN Code
Tel No.

Date Range

Start Date: 20150301

End Date: 20160301

☐ Use select date   ☐ Last1

Select Date   ③

☐ Add "/" after date

☐ Add "," (1,000,000)

☐ With Weekday

Separator Setting

Field Separator TAB

☑ Coid Add Separator

☐ Date Add Separator

Show null value as

◉ -   ○ .   ○ N.A.

○ Other

⑤   Start

④   Path   ☑ Order by Date
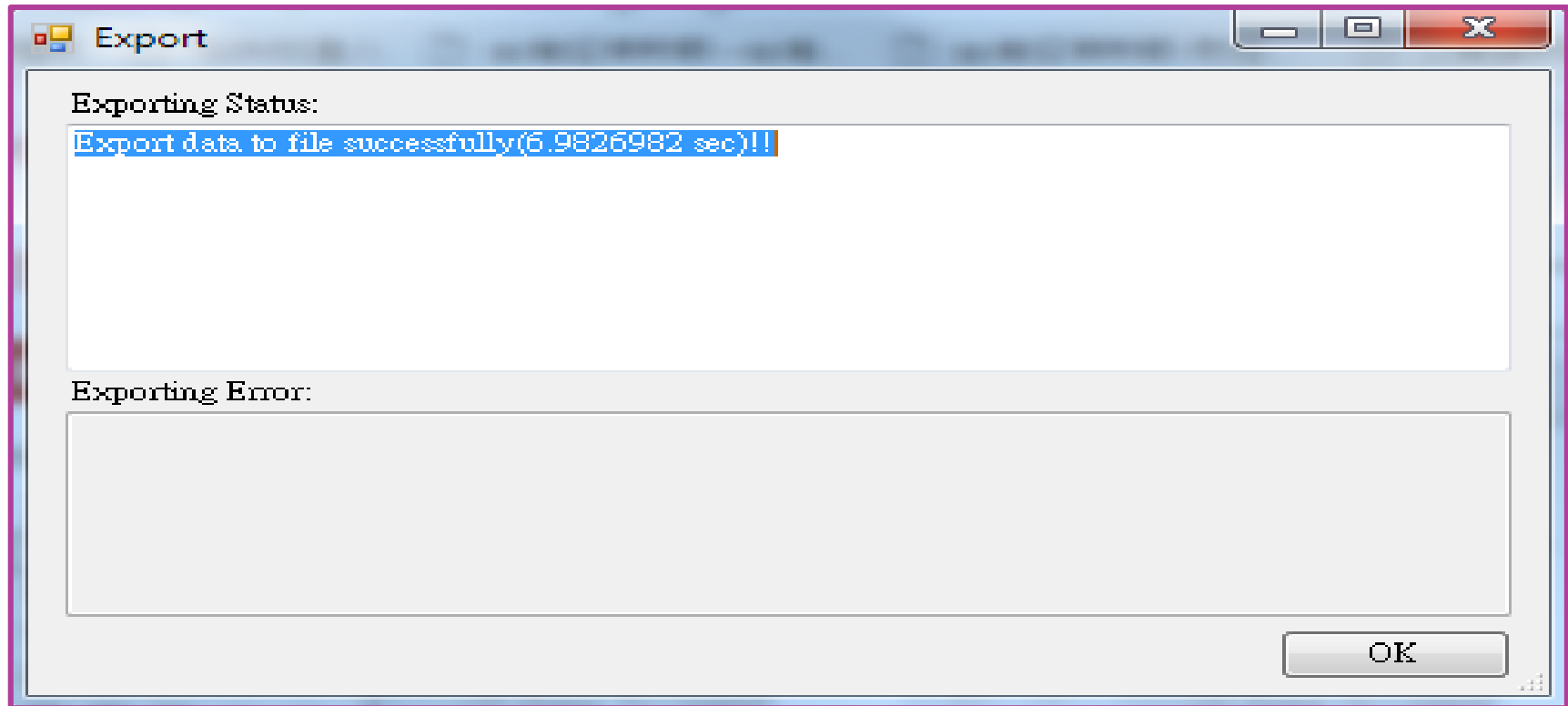
Field Caption

◉ Name ○ Name + ID   Close

c:\TEJ.txt | Ready

▶ 17

Export Saved data (II): Download Filter
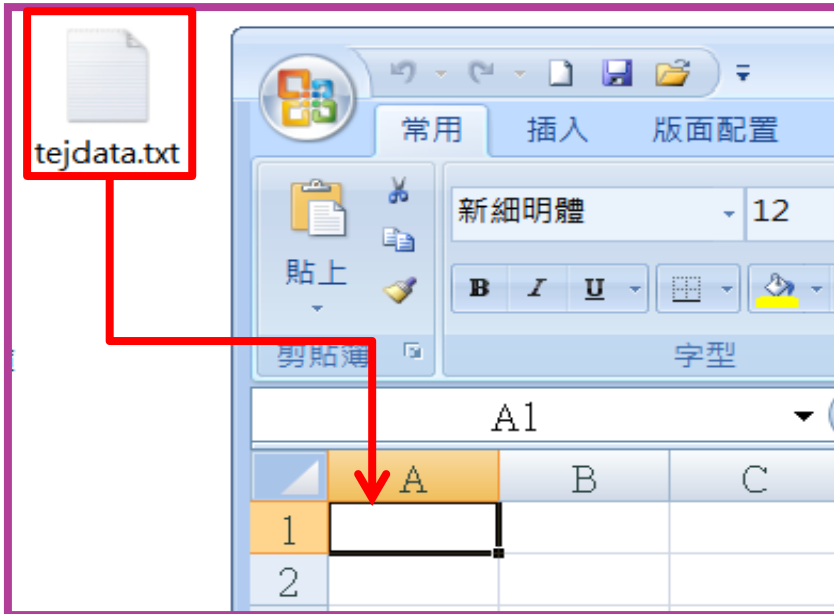(download a large number of data)

▸ When "Export data to file Successfully" is shown, the file conversion is done.

▸ If content needs to be read in Excel, please drag the text file into the blank sheet.

Export Saved data (II): Download Filter
(download a large number of data)

▶ Read the exported text file through special conversion in excel:

Step 1：Click the text file with left mouse button (as shown on the left picture, press on the tejdata.txt)

Step 2：Press and hold the left mouse button to drag the text file to the blank sheet and then release the left mouse button.

Step 3：Data would be shown as below.

	A	B	C	D	E	F	G	H
1	CO_ID	CoName	YYYY/MM	Quarter	consolidation	Month	Currency	Total cash and cash equivalents
2	116	Jih Sun Securities	201503	1	Y	3	NTD	4969155
3	930	Hua Nan Sec.	201503	1	Y	3	NTD	1791248
4	960	Fubon Securities	201503	1	Y	3	NTD	5549931
5	980	Yuanta	201503	1	Y	3	NTD	42635363
6	0009A0	SinoPac Securities	201503	1	Y	3	NTD	3702839
7	1101	Taiwan Cement	201503	1	Y	3	NTD	31406216
8	1102	Asia Cement	201503	1	Y	3	NTD	10953430
9	1103	Chia Hsin Cement	201503	1	Y	3	NTD	3152757
10	1104	Universal Cement	201503	1	Y	3	NTD	295188
11	1108	Lucky Cement	201503	1	Y	3	NTD	241190
12	1109	Hsing Ta Cement	201503	1	Y	3	NTD	742988

Auxiliary functions (I): Drawing

▸ For example, showing revenues, net income, sales growth rate and net income growth rate of Catcher Technology, HTC, Largan Precision Co. and F-TPK in Q4, 2011 with pictures.

Table Tools
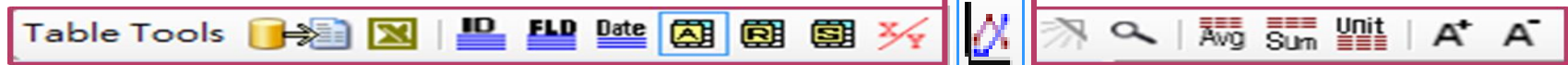
Step 1：
Click the data, press and hold the fields to drag them to the picture window, and then the pictures would be drawn.

Step 2：
Press the right mouse button, select copy picture or save picture.

*Note: Press right mouse button at the picture window for:
1. Selecting picture pattern
 (line chart/bar chart/point chart)
2. Switching multiple Y Axes /single Y Axis

Query Date 201112   Date Sorting ID Group ▾ Field Group ▾ Filter Group ▾
TEJ Consolidated First_General(Acc)-3 (Ranking)←Description

	CO_ID	YYYY/MM	Net Sales	Gross Profit	Net Income	YOY%-Sales	YOY%-Net Income
1	3008 Largan	2011/12	15,984,098	6,940,667	5,198,618	29.41	28.5
2	3673 TPK	2011/12	143,371,617	24,192,694	11,344,312	140.56	136.4
3	2474 Catcher	2011/12	35,913,842	16,890,826	10,677,233	64.41	139.8
4	2498 HTC	2011/12	465,794,773	131,797,527	61,975,796	67.09	57.6

Auxiliary Functions (II): Financial Statements & Value-added Data Base Information

台灣經濟新報TEJ+ (Version 1.6.9.3)

| 檔案(F) | 編輯(E) | 檢視(V) | 設定(S) | 選項 | 搜尋 | 介面設定 | 技術手冊(H) | 線上教學 |

關於TEJ+(A)

操作手冊 ▶

資料庫技術手冊 ▶

財務資料技術手冊_基礎篇

財務資料技術手冊_進階篇

財務資料技術手冊_公報篇

Step 1：

Open the following data base items in the folder and download the technical manuals accordingly. More manuals will be uploaded. (The numbers of download items are subject to the data base purchase agreement made by each department.)

- ✓TEJ Finance D8
- ✓TEJ New Finance D8
- ✓TEJ Taiwan Audit Quality Analysis Model
- ✓TEJ Taiwan Banking Risk Model
- ✓TEJ Taiwan Company Governance Model
- ✓TEJ China Banking Model
- ✓TEJ China Company Governance Model
- ✓TEJ China Audit Quality Analysis Model

Step 2：

Click **Technical Manual**, and select **Data Base Technical Manual** to look up related technical manuals.

Auxiliary functions (III): Read Related Articles

Step 1：

Double click on the left mouse button on the main menu-Money Watching & Credit Rating Bimonthly Journal

Step 2：

Go to search homepage and enter key words, related PDF files would be available for download.

①

This bimonthly journal, issued by Taiwan Economic Journal , is written for a particular topic by TEJ researchers and can be used as research reference.

Quick Start to Event Study

1. • Introduction to Event Study
2. • What is event day, event period and estimation period?
3. • 4 simple steps to TEJ Event Study System
4. • I. Set up data type
5. • II. Event Day selection
6. • II. Event Day selection-A. import custom samples
7. • II. Event Day selection-B1. financial news index
8. • II. Event Day selection-B2. specific events
9. • II. Event Day selection-B3. stock market chronicles
10. • III. Setting up Estimation model
11. • IV. Calculation check and storage

Introduction to Event Study

What is Event Study?

- Event Study is the research result derived from Verification Methodology which could be traced back to Ball and Brown, Fama, Fisher, Jensen and Roll in 1960s, as it is still widely applied by the recent empirical researches in accounting and financial field.

What is the purpose for Event Study?

- Event Study aims to examine abnormal returns through statistics, as well as to confirm if a certain event affects the company's stock price in which proves if there is a correlation between stock price fluctuation and this event.

The procedure for Event Study

- 1. Decide event and event day
- 2. Estimate abnormal returns
- 3. Verify abnormal returns
- 4. Analyze result and provide explanation

What is Event Day, Event Period & Estimation Period?

```
       ◁═══ Estimation Period ═══▷          ◁═══ Event Period ═══▷
  ──────┬──────────────────────┬─────────────┬────────────┬──────▶
        t1                     t2            t3    ▲       t4
                                                   │
                                                Event Day
```
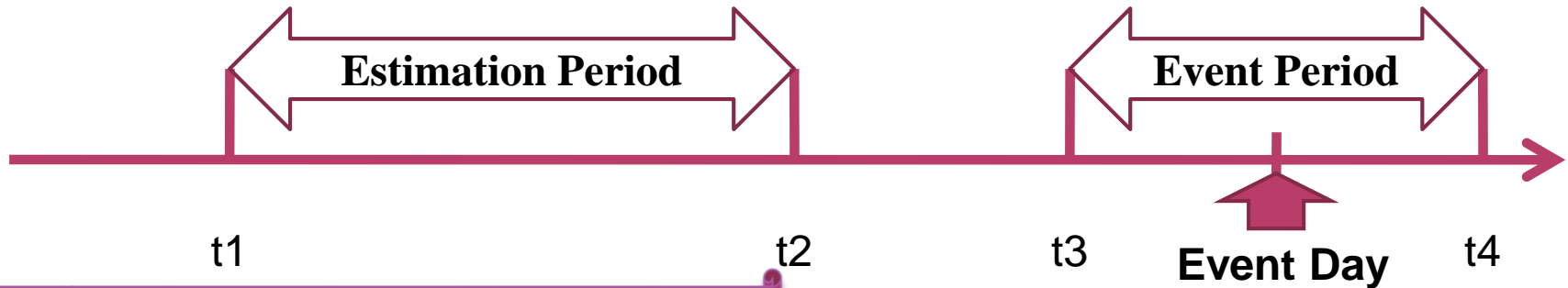
How to set up the length of event period and estimation period?

Event period should include event intervals affected by the event, such as repurchase of treasury stock and announcement date of M&A. Event period is usually broader than occurred day (event day), as it includes a period of time before and after the event in which the variations of the dependent variable (i.e. stock price and profit) would be produced after the event. Meanwhile, the stock price before the event will be a good reference for examining the effect of presage and information disclosure over the event.

Estimation period or **estimation window** is to apply the statistics derived from this period to calculate the dependent variable if the event does not occur, i.e. the expected rate of return. As expected rate of return compares with the dependent variable changed during the event (i.e. realized rate of returns), the abnormal return of this event will be calculated.

In general estimation interval will be longer than event interval, as there is no evaluation standard for most of the event studies, interval set-up needs to be based on individual research as well as relevant literature and discussed with the advisor.

4 Steps to TEJ Event Study System

1. Set up data source
-Select Security Market
-Data frequency
 selection
-Return rate type
 selection

2. Event Day
 selection
-Customize upload
-News index
-Specific event day
 index

3. Setting for Estimation Model
-Mean-Adjusted Model
-Market Adjusted Returns model
-OLS Risk-Adjusted Returns Model
-Garch Risk-Adjusted Returns Model
-Scholes-Williams OLS Risk-Adjusted
 Returns Model
-Estimation period & event period
 setting
-the shortest period setting for
 estimation period
-Set up missing return for event period

4. Calculation check and storage
-Result list: estimation statistics, estimation
summary, residual data, abnormal return
data, deleted record review, original return
(or turnover rate) data.
-Results can be stored in the designated
folder

Start to calculate

I. Set up Data Type

Step 1 Market: colored flags represent applicable market information.

Step 2 Data frequency: breaking down into three kinds of frequency: day, week and month. (Special Note: frequency type will affect the event and the unit of estimation period.)

Step 3 Return Type Selection: continuously compounded return, simple return, and turnover rate.

PS. For further instructions or explanation of event study, please click the Technical Document and Guidebook in the upper right corner.

ll. Event Day Selection

▸ Setting up event day can be carried out in two ways:

A: Import Samples: establish custom TXT or CSV sample list and import to the system.

B: Event Day Index: the system provides three indices(financial news index, specific event, stock market chronicles) to select event day.

II. Event Day selection:
A. Import Custom Samples

CVS Format produced by Excel

Enter stock symbol (4 numbers) in field A

Enter event date (8 numbers) in field B

Please do not change settings once information is entered

Choose CVS (separated with comma) in Save File Type
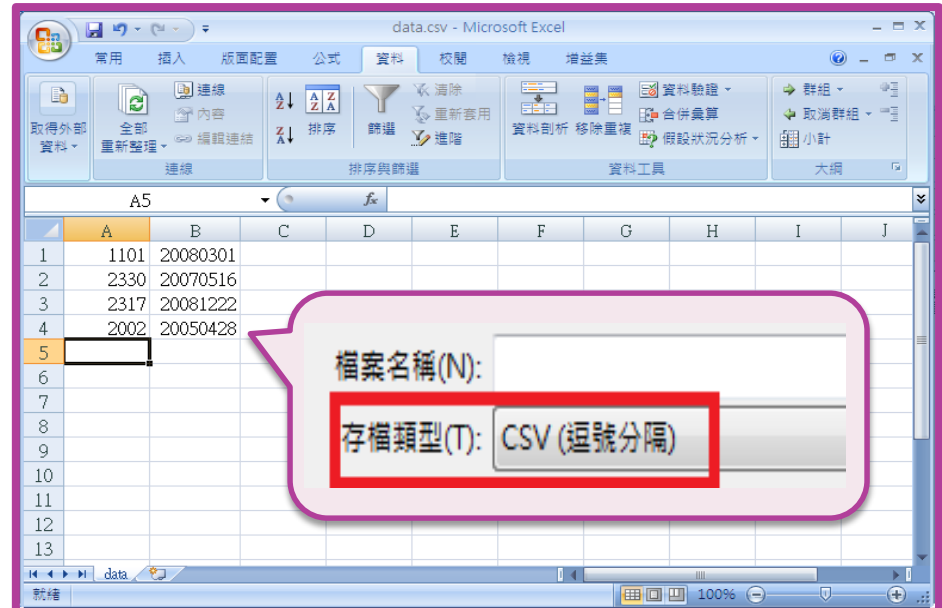
TXT Format produced by Notepad

Enter stock symbol (4 numbers) first, break with a half-width comma, and then enter event date (8 numbers).

Choose TXT in Save File Type

Separate stock symbol and event date with half-width comma.
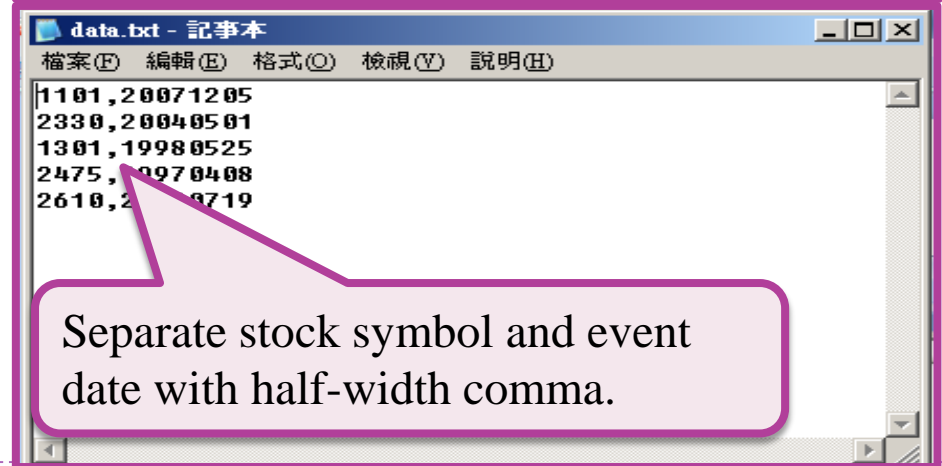
II. Event Day Selection: B1. Financial News Index

STEP3：Click and add to sample list.

STEP2： Set for Securities Sample
(two out of one)
(A) Enter the ticker symbol for securities to search
Or (B) Select industry to search
    I.   Select industries
    II.   Tick off set for sample
    III. Click "Add" tab

STEP1： enter query criteria
I.   Enter date interval
II.   Enter news key words
III. Set for search Title or Content

II. Event Day Setting:
B2. Specific Events

STEP1: Event interval
I. Enter query interval
II. Set for specific event categories
III. Set for securities sample
IV. Click "Search" tab

STEP2：
I. Tick off research sample
II. Click "Add to Sample" tab

STEP3： Set the event day as date of declaration or transaction date and click "O.K." tab.

II. Event Day Selection:
B3. Stock Market Chronicles

STEP1 ： Data Interval
I.　Enter date interval
II.　Select event categories
III.　Set for securities sample and search

STEP2 ： Selection
I.　Tick off research sample
II.　Click "Add to Sample" tab

* **Stock Market Chronicles**
(TEJ will divided major events in the stock market into different categories)

III. Set up Estimation Mode

Step 1: Select estimation model

Step 2: Based on the estimation model, enter category, index code, estimation period, event period accordingly.

Step 3: Decide minimum sample size during the estimation period.

Step 4: Set up samples when the missing return arises during event period.

Step 5: Click "Calculate" tab

P.S

1. It is not mandatory to select two index codes.

2. Estimation period and event period is based on individual research design. The picture is for reference only and are not considered the only one standard.

IV. Calculation check and storage

▸ Calculation is shown as the picture on the right, including estimation data, estimation summary, residual data, abnormal return and delete record review.

▸ Click Save will allow exported sheets to be saved in designated locations.

▸ Please click right mouse button on the picture to "Save As Picture" if needed.
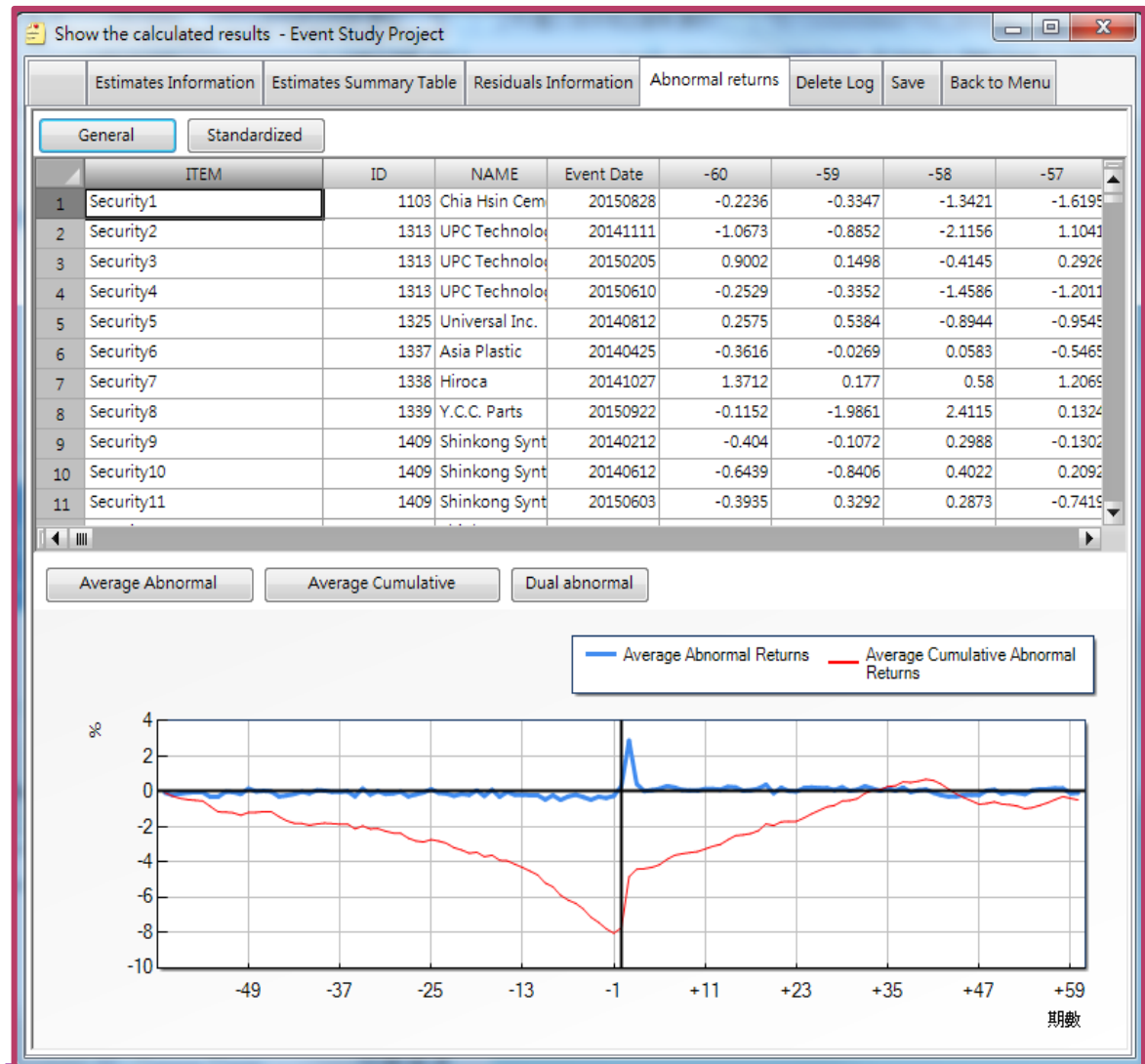
Quick Start to TEJ Smart Wizard
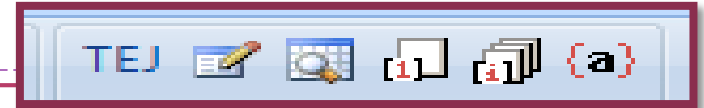
1
- Introduction to Smart Wizard Toolbar

2
- Criteria Setting-information, company, date, others

3
- Modify Criteria Setting –Function of lowercase **a**

4
- Example: Cross data base download

TEJ Smart Wizard Toolbar
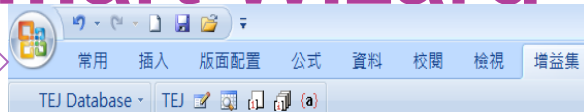
Function Button	Function Description
TEJ	TEJ: Link to TEJ Official website-Download TEJ Smart Wizard example
	Parameter: System parameter setting: change languages/ select database country(Language selection: Traditional Chinese, Simplified Chinese, English; Country Selection: based on the DB purchase)
	DB Query: Setting up required data criteria
	Update Worksheet: Update single worksheet only
	Update Workbook: Update the current Excel file
{a}	**a:** Edit function When the cursor stops at the red mark on the upper left corner in the exported table by TEJ Smart Wizard, tap on **lowercase a** button to call for the former setting and edit again.
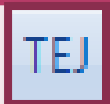
*TEJ Smart Wizard Toolbar will be installed in the Add-ins of Excel 2007 (TEJ Smart Wizard Toolbar shows directly in Excel 2003 Toolbar). If TEJ Smart Wizard Toolbar fails to be executed, please call TEJ Customer Service line @ 02-87681088#120, our professional will provide assistance.

TEJ Smart Wizard-Criteria Setting
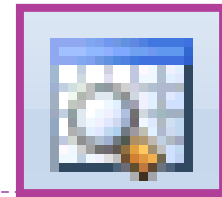
TEJ Smart Wizard (Version 3.5.1.0) -- 活頁簿1

Data Source

Type	TSEC+GreTai
SmartID	TEJ TOP DB Key=2
Data	High Risk Stock Screening DB
Search	Market ☐ ID Search

Step 1: Information source

Industry Type
Stock Price
ROI%_Daily
AP 20
AV 20
Book Value
Recurring EPS
RM_Attention

Select | Select All | Clear All | Clear

☐ Adv. Date Option   Adv. Date Option

Date Setting

Date Range 2015/03/02 to 2016/03/02 ☑ Descending Search

Frequency ⦿ Daily ○ Weekly ○ Monthly ○ Quarterly ○ Yearly
Date ☐ Last Period Last ☐ Calendar Date

Step 3: Date setting

20160223
20160222

Select | Select All | Clear All | Clear

Company Setting

☐ Set Industry

Common Stock
Common Stock(Include ETF)
Common Stock(Excluding TDI
Common Stock(Excluding TDI
Non Fin & Ele (Excluding TDF
Foreign enterprises IPO

Sector Common Stock Import Codes

Search Code/Name 1101==>Taiwan Cement Select

Companies   Selected Companies
1101==>Taiwan Cement

1110==>Tuna Cement
1201==>Wei Chuan Foods
1203==>Ve Wong
1210==>Great Wall

Step 2: Company setting

Select | Select All | Clear All | Clear

Single Code/Date ⦿ No Designation ○ Code ○ Date

☐ New Worksheet Load ☐ New Table

Step 4: Other setting

Clear All Setting | Next | Export to Excel | Preview

TEJ Smart Wizard

TEJ Smart Wizard -Criteria Setting 1: Information Source

Information Type:
Select sample range, the Smart ID list below will change with the company list on the right simultaneously.
For example:
1.If Macroeconomics DB is required, info type needs to be changed into Macroeconomics.
2.When checking a listed and GRETAI listed company during a certain period, please select **listed**+ **GRETAI listed** + **delisted** company

Type & Data: Category is as the same as the TEJ main menu.
Type: Database category
Data : Database

Select Field:
Left-clicking the mouse twice can select or remove the required info while press Ctrl or Shift can select fields consecutively.

Mobile Arrow Keys:
can adjust field order, but only one field at a time.

TEJ Smart Wizard -Criteria Setting 2: Company
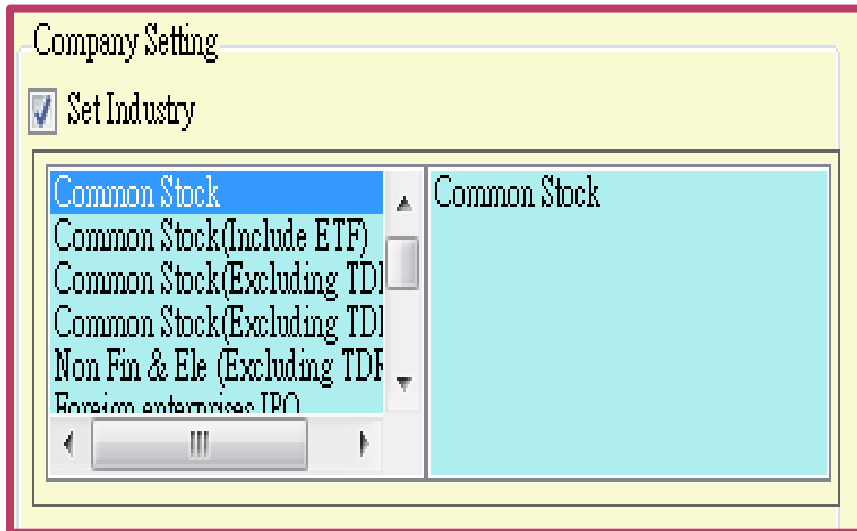
Designate industry:
If the sample criterion is fixed as common stock or certain industry, tick off Designate Industry. For example, when the user designates-steel industry, the file will update company list automatically whenever a new company joins or the old one drops out.
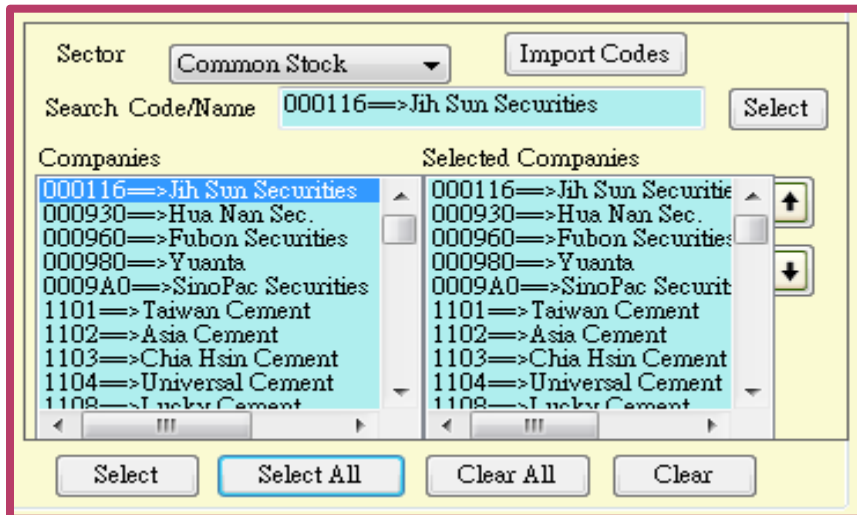
Designate Individual Stock:
•Method 1: Select a certain industry based on the required company
•Method 2:Import selected company groups-> copy the company list with company code-> right click the mouse-> import the info from Clipboard

TEJ Smart Wizard -Criteria Setting 3: Date

Date interval: Default interval is the current year, the interval can be changed manually.

Ascending/Descending order: The default is in descending order, if ascending order is required, untick the default box and re-select the date. Exported data will adhere to this setting and show in ascending/descending order accordingly.

Frequency: Custom frequency

Select date: Left-clicking the mouse twice can select or remove the required date while press Ctrl or Shift can select dates consecutively.

Most recent period: The most recent data setting will be extracted from all the selected fields.

☐ Adv. Date Option   Adv. Date Option

Date Setting

Date Range 2015/03/02 to 2016/03/02 ☑ Descending   Search

Frequency ⦿ Daily ◯ Weekly ◯ Monthly ◯ Quarterly ◯ Yearly

Date ☐ Last Period   Last ▼   ☐ Calendar Date

20160302
20160301
20160226
20160225
20160224
20160223
20160222

Select   Select All   Clear All   Clear

TEJ Smart Wizard -Criteria Setting 3: Date (Advanced)

Step 1: Tick off advanced field for date selection

Step 2: Set up date range

Step 3: Choose return type

Step 4: Apply to all fields

Step 5: Okay

Example 1: Data required in recent periods
Date range: Choose **Recent N Periods**
Transactions: enter required periods
(e.g. 5 stands for the recent 5 periods)

Example 2: Search for data in a certain period
Date range: select Date Interval
Start date: yyyymmdd (e.g. 20120101)
End date: 99999999
->the field shows data from 20120101 to the recent period

Date range: Weekly frequency
Start date: 20120101
End date: 20120731
Return type: average
->If the data is arranged in daily frequency (e.g. stock price), the exported data will be the weekly average

*Note: Choose ONLY ONE out of these two options: Date setting and Date setting-advanced

TEJ Smart Wizard -Criteria Setting 4: others

Single Code/Date	⦿ No Designation	○ Code	○ Date	[ ]

☐ New Worksheet   [Load]   ☐ New Table

Macro Name	[ ]	Separated with ‖‖‖

Excel Range   Co. ID [   ]   Date [   ]

Produce new sheet: When exporting data, open a new sheet in the current file to export data.
*Recommended

Designate company code/ date position:
The system default starts from cell A1, the cell position can be changed to, such as B30/H5, based on the user's need.
*Function introduction:
Do not designate: search for data cross companies and cross time periods
Designate company code: search for individual company
Designate date: search for single date

Automatic Macros Execution:
If the file comes with related macros setup, adding macros to the File Note will enable macros to be automatically executed as data updates.

TEJ Smart Wizard -Criteria Setting 5: Format

▸ After setting company, date, field (variants), click "Next" to select array and then click "Export to Excel".

TEJ Smart Wizard –Demonstration for Cross Data Base Download (Example)

‣ **Research time: 2000-2012**

‣ **Frequency: Year**

‣ **Research Sample:** Taiwan's paper-making companies that became listed and GRETAI listed during this research.

‣ **Required Variants:** Based on the financial ratios in the consolidated financial statements, including ROA, ROE, R&D expense, EPS, revenues, current ratio, year-end market value, shares outstanding, annual return, shareholding ratio of board member, manager shareholding ratio, shareholding ratio of institutional investors, right to share profit, control level and one-year Beta.

TEJ Smart Wizard –Demonstration for Cross Data Base Download→Step 1

▸ **Data type:**

Given to the need for listed and GRETAI listed companies during a certain of period in the past and the sample integrity, please select TSEC+GreTai+Emerging +Others to cover all the relevant information as well as to include delisted companies after this period of time.

▸ **DB type and info name:**

i.e. DB category and info name in TEJ+ Main (please refer to the pictures)

TEJ Smart Wizard –Demonstration for Cross Data Base Download→Step 2

‣ **Company setting:** Given to designation of a certain industry, the company list of the paper-making industry will based on this download, no matter the stock market fluctuation in the future, therefore choose "Paper-Making Company" in the "Company Category" and then press "Select All"

TEJ Smart Wizard –Demonstration for Cross Data Base Download→Step 3

▸ **Date setting:**

Step 1: Enter 20000101-20121231 in the date interval.

Step 2: Choose "Year" for the frequency.

Step 3: Untick the box on the left side of descending order and press search for the data arrangement starting from 2000.

Step 4: Select all the appeared dates to the right side.

TEJ Smart Wizard –Demonstration for Cross Data Base Download→Step 4

▶ Step 1: At designate company code/date position: click "Do Not Designate"

Description: This example needs as many companies and intervals as possible, and thus choose "Do Not Designate"

▶ Step 2: Tick off "Produce New Sheet"

Description: Please tick off "Produce New Sheet" to **avoid overwriting the original worksheet.**

▶ Step 3: Click "Next"

TEJ Smart Wizard –Demonstration for Cross Data Base Download→Step 5

‣ **Format Setting:**

According to the data types, the system provides nine ways of data arrangement. Please choose the arrangement based on personal requirement and then press "Export to Excel".

TEJ Smart Wizard –Demonstration for Cross Data Base Download→Step 6

▸ Export Result is shown in the picture below: