SDC PLATINUM ADD-ON

USER GUIDE

This user guide introduces LSEG Workspace's add-on premium deals offering, SDC Platinum.

This service can be hosted via desktop or web. It contains Industry Standard League Tables and content across new issues, M&A, syndicated loans, private equity, project finance, public finance (Munis), poison pills, shareholder activism, repurchases and joint ventures and strategic alliances.



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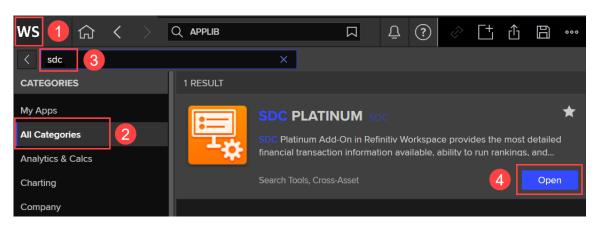
Chapter 1 – Overview

Accessing SDC Platinum

Log in to LSEG Workspace with the credentials provided by your Client Success Manager or welcome email. Only permissioned users can view and open SDC Platinum.

To open using the App Library

- 1. Click the WS icon in the top menu bar and select App Library from the list, or click APPLIB in the bookmark menu bar.
- 2. Select All Categories from the Categories menu.
- 3. Type the short code **SDC** in the APPLIB search bar. The SDC Platinum app displays.
- 4. Click the **Open** button.



To open using the Deals menu

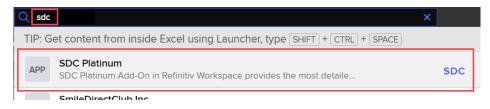
Clients with Banking Profiles set up will see **Deals** on the Workspace menu.

Click Deals in the menu bar and select SDC Platinum from the list.

COMPANY	DEALS	RESEARCH		
	Comp	any Deals		
	Deals	Deals Markets		
RECENT SESS	SDC P	SDC Platinum		
Untitl	Deals	Intelligence		

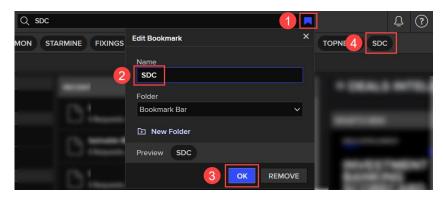
To open using the search bar

- 1. In the search bar, type the short code **SDC**.
- 2. Select **SDC Platinum** from the list to open the app.



Bookmarking SDC Platinum

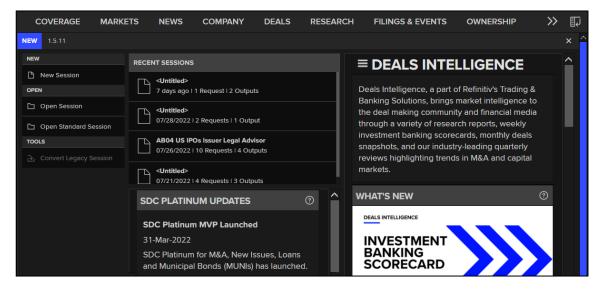
- 1. Select the **Bookmark** icon for SDC in the search bar.
- 2. Name the bookmark and click the **OK** button. The SDC bookmark displays in the bookmark menu.



Chapter 2 – Getting started

On opening the SDC Platinum Add-on, the landing page displays.

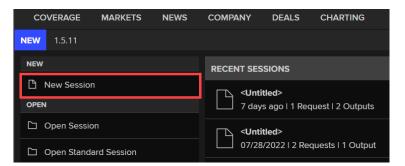
The appearance of the landing page can be charcoal or white, depending on your Workspace color and theme settings.



Creating a new session

New sessions are based on a selected dataset, and can have reports, league tables and volume analysis run against them.

1. Click **New Session**. The Database Selection screen displays, showing all the data available to query. If you don't have permission for a dataset, it will be disabled.



2. Select the option button of the database you want and check the boxes of the database options you want. Click Next.

Database Selection							
Global New Issues ①			Mergers & Acquisitions ③				
EQUITY	BONDS	LOANS ①					
- All Equity	All Bonds	All Syndicated Loans					
Common Stock	Non-Convertible Bond	ls					
2 Convertible	Preferred Stock	Preferred Stock					
Equity Pipeline and Registration	ns Mortgage/Asset Backe	ed					
Municipal Bonds ①	Corporate Governance	🕒 Infra 360 🕕	Private Equity ①				
US Municipal New Issues							
All International Municipal New							
Issues							
			CANCEL NEXT				

A new session page opens for the selected content set.

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APPLIB	FIXINGS	NEWS2.0 St) C						
COVE	RAGE	ARKETS NEW	S COMPANY	DEALS RESEARCH	FILINGS & EVENTS	OWNERSHIP	MANAGEMENT & GOVERNANCI	E CHARTING	
NEW									
Dashbo	ard Sess	ion Output I	Utilities Help						
SESSION	l: <untitled></untitled>	0 B		40 40	ha USE 💿 LOG			D OUTPUT 🗸	EXECUTE
Status	Request	Results	Туре	Description		Operator	Value		Action
			Content Set	Global New Issues			Convertible		
			Data Items	Dates: Issue Date			All Dates		~~01

Building a search for data items

A new session displays the content set selected and provides a Date data item to begin your search. You can double-click the Date to change it from All Dates (entire history) to a selected data range.

Double-clicking a data item field in the session list opens its details panel in the data item library. It can then be edited.

The library categorizes data items by the filter tab. The filter's default setting is **All Items**. Each filter displays the number of items it includes. These results are filtered (decrease) by the search as you create it.

You can search for data items using:

- Text
- Filters, including Favorites and Recently Used
- Workspace codes or heritage SDC codes
- Alias keywords

To build a search by text or keyword

Type a partial phrase or word in the data items library Search field. This can be the name of the data item, or an alias – a keyword that is associated with the data item. The longer or more complete the entry is, the more exact the auto-suggest search results are.

The example below shows the results for the search term stat. The filters display the number of relevant results:

DATA ITEM LIBRARY								
stat Q Favorite:		Recently Used 1 All Items 31	Advisor Info 4 Deal Info 7 Fi	inancials 0				
Name		Code						
Deal Status	☆	STAT, STATC, STATC						
Acquiror Financial Advisors State	☆							
Acquiror Financial Advisors Parent State	☆	AASTATE						

To build a search by filter

- Select the Favorites filter to display selected favorites (starred data items)
- Select the Recently Used filter to view the last 50 used data items from previous searches.
- Select a filter to view the data items for that filter. The example below shows the Advisor Info filter tab selected:

DATA ITEM LIBRARY				
Search all data items Q Fa	vorites 5	Recently Used 12 All Items	1594 Advisor Info 160	Deal Info 456 Financials 495
Name		Code		
Acquiror Due Diligence Advisor	☆	AACC		
Acquiror Due Diligence Advisor Code	☆	AACCC		
Acquiror Financial Advisor Code	☆	AAA_AACODE, AAA_AACODE		
Acquiror Financial Advisor Assignments	☆	AASSIGNC, AASSIGNC_ELIG, AA		
Acquiror Financial Advisor Client	☆	AA_CLIENT		

To build a search by code

• Type the whole or a partial Workspace code in the data items library Search field. The longer or more complete the entry is, the more exact the autosuggest search results are. The example below uses the code for the data item **Rank** Value inc. Net Debt of Target, which is **RANKVAL**:



Type the whole heritage SDC code in the data items library Search field to get an exact match. The search will not
return heritage code results for a partial match.

Adding data items to a session

After building your search, you can select and edit the data item you want.

1. Select the data item. The details pane on the right side populates with the item's definitions, details, and options.

DATA ITEM LIBRARY			Ľ
stat Q Favori		Recently Used 1 All Items	31 Advisor Info 4 Deal Info 7 Financials 0 Participant Info 1
Name		Code	DEAL STATUS
Deal Status	☆	STAT, STATC, STATC	Deal Status: Most recent status of the transaction. Status codes are grouped into 5
Acquiror Financial Advisors State			categories: Completed, Pending, Tentative, Unknown, and Withdrawn. When selected,
Acquiror Financial Advisors Parent State		AASTATE	 these 5 categories are expandable and correspond to the following status cod See more
Target Financial Advisors State			Mergers & Acquisitions → Deal Info
Target Financial Advisors' Parent State		TASTATE	
Related M&A Deal Status		RDSTATUS, RDSTATUSCODE, R	Select 🗸 🔁 🖹
State where Laws Governing Deal are Applica		LAWC	Action
Proxy Statement Date			
Related Loan Status	☆	RELLOAN STATUS RELLOAN	

2. Make any edits you want to the data item information and click OK. The data item is added to the session.

Creating an output (multiple outputs)

There are three output types:

- **Reports:** To create deal lists
- League Tables: To apply an LSEG Standard League Table ranking or create a custom ranking
- Volume Analysis: To apply an LSEG output or create a custom volume analysis

To create an output:

4.

- 1. Ensure you have added all the data inputs you want in your session.
- 2. Click the Output option or the Add Output button on the session menu bar.

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Dashboa	rd Sessi	on Output U	tilities Sett	ings Help									
SESSIO				[®] LOGICAL OPERATION	Dynamic Logical Set ON	i I	DATA ITEMS		ιτυο	PUT 🗸		🖾 EX	ECUTE
Status	Request	Results	Туре	Description	Oper	rator	Value				_		Action
	0		Content Set	Global New Issues			Non-Co	nvorti	hle Ron	nds Prof	forred		A 🛱

- 3. Select the Report, League Table, or Volume Analysis option from the dropdown list.
 - Select one of the following for the output:
 - New Custom: create a new output item
 - Open Custom: load a saved output item
 - SDC Standard: select a standard output provided by LSEG

MS	🖹 ADD OUTPUT 🗸	
-	Report >	Action
-	League Table 🛛 📏	
1.000	Volume Analysis 〉	New Custom
		Open Custom
	green, seering days in	Open SDC Standard

- 5. Select the options required or load a file for the output item.
- 6. Click Next on the output menu bar. The new output item is added to the session.

SESSION	l: A Acq	Ø	8 % Ø	D USE @ LOGICAL OPERA		MS 🖹 ADD OUTPUT 🗸	
Status	Request	Results	Туре	Description	Operator	Value	Action
			Content Set	Mergers & Acquisitions		M&A	~~// 位
~		1380244 🕹	Data Items	Date Announced		All Dates	~~ <i>⊘</i> ⊡
\checkmark		19853 🕹	Data Items	Deal Value (Curn=USD, Scale=6, Include	Greater Than Or Equal	900.00	^∨⊘⊡
~	3	14218 🕹	Data Items	Deal Status	Include	Completed	~~⊘⊡
	4	¥	Output	League Table: <untitled></untitled>			へ▽⊘茴

7. To create multiple outputs, go to step 2 above and repeat until finished.

Chapter 3 – Helpful utilities

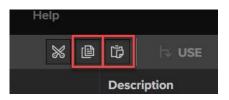
Copying and pasting requests

In your requests window, you can copy and paste the listed data items and output rows. The pasted item will be an exact copy of the original and can be edited.

1. In the request window, select the data items or output row you want.

SESSION	N: Session01	0 B	× 0	ば は USE	
Status	Request	Results	Туре	Description	Opera
	0		Content Set	Mergers & Acquisitions	
	1	<u> </u>	Data Items	Date Announced	
	2	₹	Data Items	Rank Value inc. Net Debt of Target (Curn	Great
	3	Ł	Output	Report: Report01	

2. Click the **Copy**, and then the **Paste** button.



- SESSION: Session01 🔗 🗒 * 🖻 ট I USE **D LOGICAL OPERATION** Status Request Results Туре Description Opera Content Set Mergers & Acquisitions Date Announced Data Items Data Items Rank Value inc. Net Debt of Target (Curn... Greate Ŧ Data Items Rank Value inc. Net Debt of Target (Curn... Great Ł Output Report: Report01
- 3. The copied row displays below the original.

Saving a session

SDC Platinum sessions can be saved, and then reused or shared. The saved files use the .SDCS suffix.

- 1. Include in your session all data items, logical sets and outputs you want to save.
- 2. Click the Save icon on the session menu bar to open the Save Session dialog.

Dashb	oard S	ession Output	t Utilities He	lp				
SESSION: M&A-Session01 🖉 📋								
Sta	Requ	Results	Туре	Description				
	0		Content Set	Mergers & Acquisitions				
	1	\mathbf{T}	Data Items	Date Announced				
	2	Ť	Data Items	Rank Value inc. Net Debt of Target (Curn				

3. Type the name you want in the Session Name field and click **Save**.

Save Ses	ssion?		
Session	Name		
M&A Se	ession13		
	SAVE	DON'T SAVE	CANCEL
	SAVE	DONTSAVE	CANCEL

The file is saved in the folder specified in your browser settings.

Use Request and Logical Sets

Use Request and Logical Sets are features that all for very granular searches leveraging filters and applying Boolean logic.

Overview

Use requests and logical operations allow SDC Platinum users to reuse existing session requests and create union, intersect, or subtract groups of content based on search requests. This helps SDC Platinum users to build complex searches.

Use request

The Use functionality allows you to reference the universe of deals up to that requested data item. It enables you to return to the data item, or search request, and start filtering the universe from it.

SESSION	1: <untitled></untitled>	Ø 🛱	×	ゆ しの Logical oper/		MS 🖹 ADD OUTPUT 🗸 🔀	EXECUTE
Status	Request	Results	Туре	Description	Operator	Value	Action
			Content Set	Mergers & Acquisitions		M&A	
~		33801 🕹	Data Items	Date Announced		Year To Date	◇~∥ ⊡
~	2	21933 🕁	Data Items	Deal Status	Include	Completed	^∨⊘値
~		33801 🕹	Use Request	h→ Use Request 1		Date Announced: Year To Date	^∨⊘値
~	4	8403 🕹	Data Items	Target Nation	Include	United States	へ \ ⁄ ⁄ 心

Note: The Use button is enabled only for data item requests. It is disabled for output requests.

Types of logical operations

The logical operations in SDC Platinum use Boolean logic. There are three available operations:

Union (OR)	Intersection (AND)	Difference (MINUS)
You can combine the results of two or more requests (OR). For example, using OR, this search	By default, the logical operation applied to screening criteria in a session is intersection.	You can subtract the transactions in one or more search requests from another (MINUS).
retrieves results with Market, Shares, and both.	With intersection, you can find the common transactions in two or more requests (AND).	Remember to enter the sequence numbers in the correct order — the request from which you want to subtract
	For example, using AND, this search retrieves results with Market and Shares.	transactions needs to be 1st. For example, using NOT, this search retrieves results with Market, and excludes those with Shares or Market with Shares.
MARKET SHARES	MARKET SHARES	MARKET SHARES

Adding logical operations to use requests

To add logical operation to the Session View:

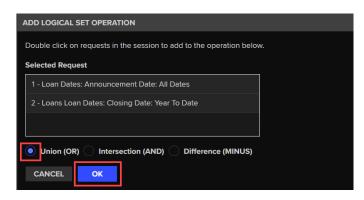
1. Click Logical Operation on the header pane of Session View.

SESSION	N: <untitled></untitled>	1 A B		ট 巾 USE	(1) LOGICAL OPERAT		I DATA ITEMS	🖹 ADD OUTPUT 🗸	
Status	Request	Results	Туре	Description		Operator	Valu	e	Action
			Content Set	Mergers & Acquisition	ons		M&A		へ∨∂ ⑪
~	1	33801 J	Data Items	Date Announced			Year	To Date	へく食品

2. Double click the requests to move them from the Session View into the Logical Operation box.

1 Jata Items Loan Dates: Announcement Date All Dates 2 Jata Items Loans Loan Dates: Closing Date Year To Date 3 Jata Items Loan Syndicate Type Exclude Bilateral, Ineligible Amendments	Action	9	Value	Operator	Description	Status Request Results Type Description						
2 1 Data Items Loans Loan Dates: Closing Date Year To Date 3 3 0 Data Items Loan Syndicate Type Exclude Bilateral, Ineligible Amendments 4 1 Data Items Use of Proceeds (IncludeNull=True) Exclude Limited Recourse Project Finance NDLOGICAL SET OPERATION Double of the operation below.		ndicated Loans	All Sy		Global New Issues	Content Set		0	_			
3 J Data Items Loan Syndicate Type Exclude Bilateral, Ineligible Amendments 4 J Data Items Use of Proceeds (IncludeNull=True) Exclude Limited Recourse Project Finance DD LOGICAL SET OPERATION		ates	All Da		1 Jata Items Loan Dates: Announcement Date							
4 J Data Items Use of Proceeds (IncludeNull=True) Exclude Limited Recourse Project Finance DD LOGICAL SET OPERATION Double click on requests in the session to add to the operation below. Exclude Exclude Exclude		To Date	Year		Loans Loan Dates: Closing Date	2 上 Data Items Loans Loan Dates: Closin						
DD LOGICAL SET OPERATION Double click on requests in the session to add to the operation below.		eral, Ineligible Amendments	Bilate	Exclude	3 🛃 Data Items Loan Syndicate Type							
Double click on requests in the session to add to the operation below.		ed Recourse Project Finance	Limite	Exclude	Use of Proceeds (IncludeNull=True)	Data Items						
							OPERATION	GICAL SET (DD LO			
belected Request					pelow.	add to the operation bel	lests in the session to	click on requ	Double			
								d Request	ielecte			
1 - Loan Dates: Announcement Date: All Dates						l Dates	nouncement Date: Al	an Dates: An	1 - Loa			

3. Select either the Union (OR), Intersection (AND), or Difference (MINUS) logical operation option and click OK.



The Logical Operation request is added to the Session View.

SESSION	I: <untitled></untitled>	ØB		ট# ᄂ USE	(1) LOGICAL OPERA		MS 🖹 ADD OUTPUT 🗸 🔀	EXECUTE
Status	Request	Results	Туре	Description		Operator	Value	Action
			Content Set	Global New Issues			All Syndicated Loans	
		\mathbf{F}	Data Items	Loan Dates: Announce	ment Date		All Dates	~~ <i>⊘</i> 🖻
		\mathbf{F}	Data Items	Loans Loan Dates: Clo	sing Date		Year To Date	∧∨⊘₫
		\mathbf{F}	Data Items	Loan Syndicate Type		Exclude	Bilateral, Ineligible Amendments	~ <i>∨∂</i> ₫
		\mathbf{F}	Data Items	Use of Proceeds (Inclu	deNull=True)	Exclude	Limited Recourse Project Finance	ヘイタ 🖻
	5	¥	Logical Set		ion	Union	Request 1 OR 2	へ∨⊘龅

Chapter 4 – Further help and support

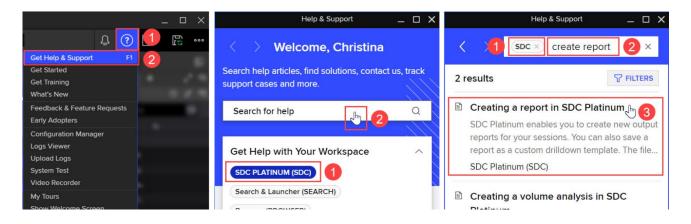
Accessing in-product help

LSEG Workspace has extensive in-product help that is available to all viewers.

- 1. Select the **Help** (?) icon in the top right corner of your screen.
- 2. Select Get Help & Support from the list. The Help Welcome screen displays in a popup window.
- 3. If you have the SDC Platinum Add-on open when you open the help, an SDC filter pill displays on the first page. Click this to select the filter.
- 4. Click in the **Search for help** field. The Discover Help Topics screen displays and the filter displays as a pill in the search field. Articles filtered for SDC display in the results list.

Note: If you didn't select the front-page filter pill, type **SDC** in the search field and press **Tab**. This also creates the SDC filter.

- 5. Type keywords in the search field for the help you want, and press **Enter**. The results list displays all relevant SDC articles.
- 6. Click an article to open it.



Support

You can contact us directly through the Help & Support app via the **Contact Us** section. And to access learning content on the training site, go to <u>training.lseg.com/workspace-training/</u>.