

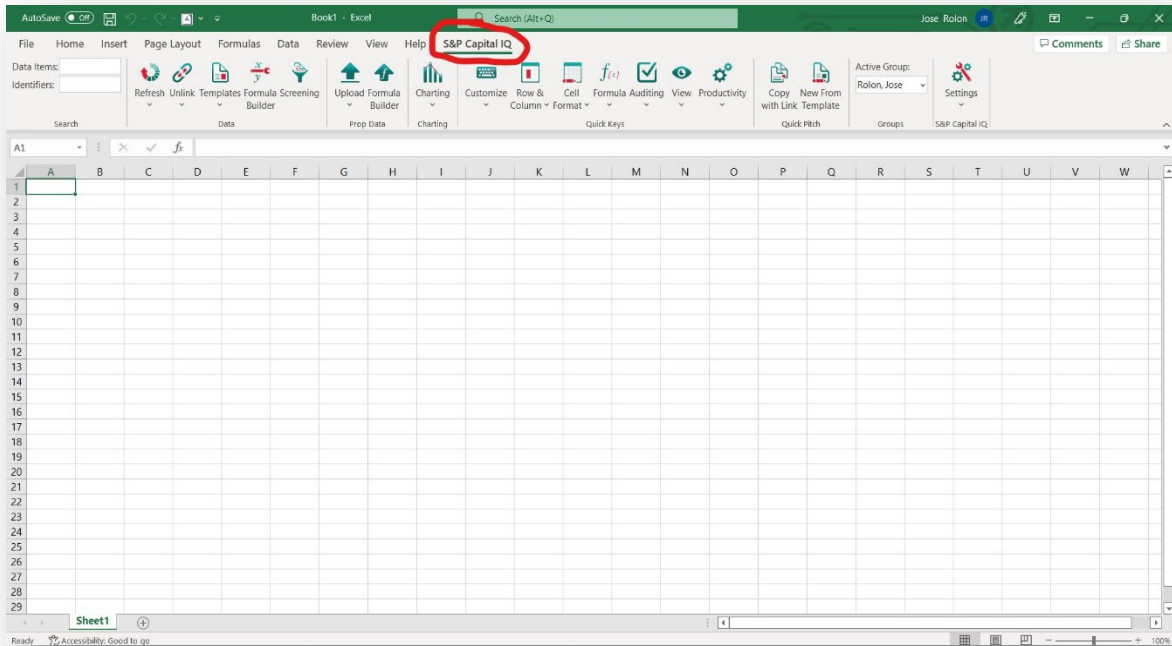
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How to download Capital IQ Templates in Excel

This tutorial will show you how to download templates from the Capital IQ plugin into an Excel worksheet.

First, open a blank Excel worksheet.

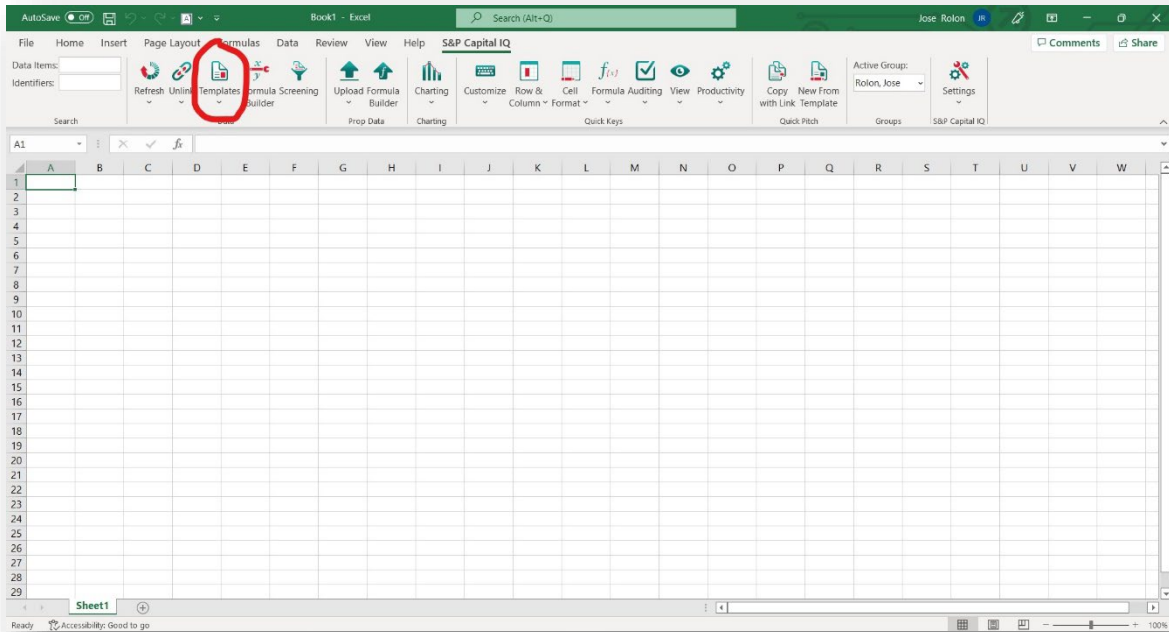
Then, go to the **S&P Capital IQ** Tab located near the top of your screen.



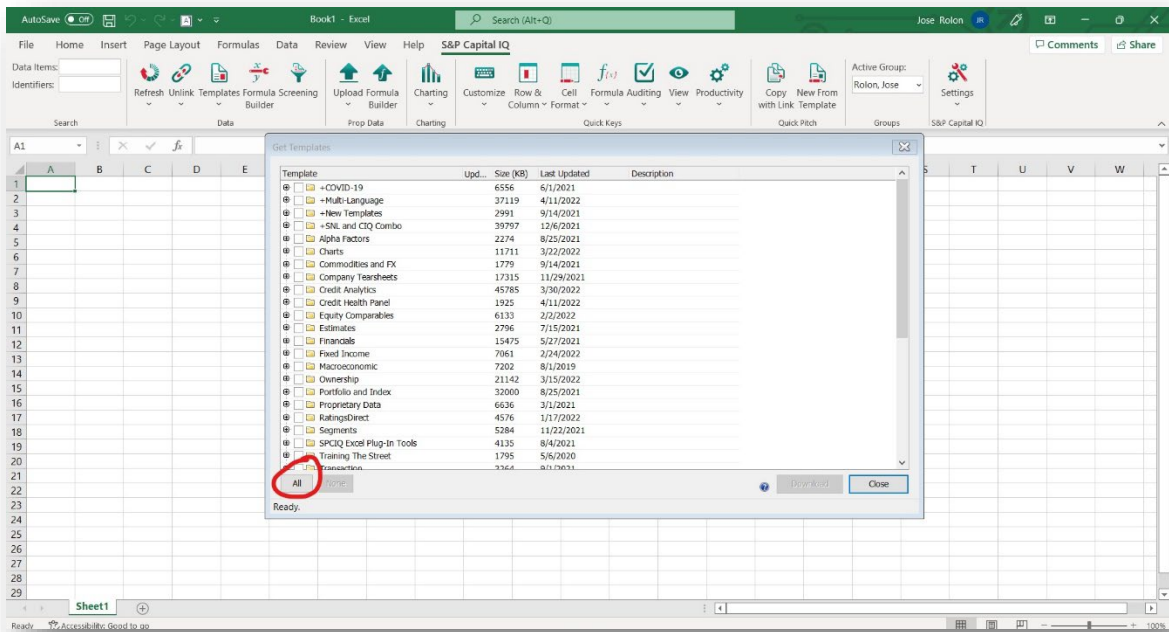
Once you are on the **S&P Capital IQ** Tab, click on **Templates**



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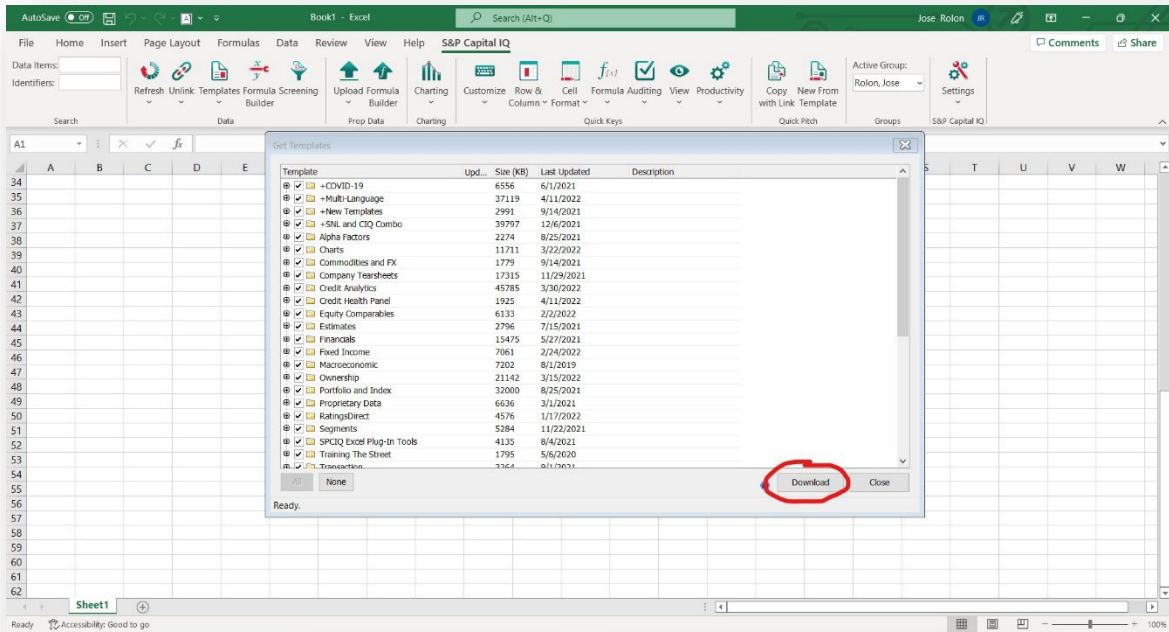


Click on **Get/Update Templates**, and the screen below will pop up. Click on **All** in the bottom left corner, then click on **Download**. This step will take a couple of minutes.

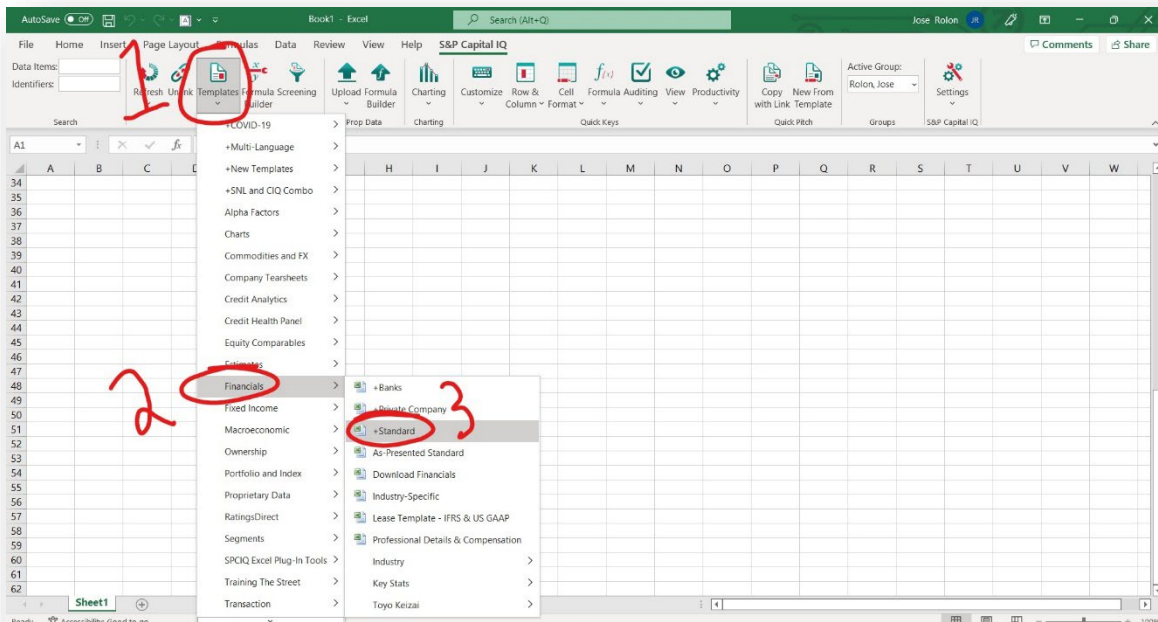




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As an example, I will show you how to open one of the templates you just downloaded. Click on **Templates**; you should see a list like the one below. Hover over **Financials** and click on **Standard**.



This will open a Template where you can see the Financial Information of any publicly-traded company.



INTERNATIONAL BUSINESS MACHINES CORPORATION (NYSE:IBM) S&P Capital IQ

Period Date	Fiscal Year Ended											LTM
	12/31/2011	12/31/2012	12/31/2013	12/31/2014	12/31/2015	12/31/2016	12/31/2017	12/31/2018	12/31/2019	12/31/2020	12/31/2021	
Revenues	104,784.0	100,834.0	96,321.0	90,736.0	79,878.0	78,210.0	77,424.0	77,992.0	56,498.0	54,195.0	56,571.0	57,772.0
Finance Div. Revenues	2,132.0	2,040.0	2,047.0	2,057.0	1,864.0	1,710.0	1,715.0	1,599.0	1,216.0	984.0	780.0	0.0
Insurance Div. Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gain(Loss) on Sale Of Assets (Rev)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gain(Loss) on Sale Of Invest (Rev)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Interest And Invest. Income (Rev)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Revenues	0.0	0.0	0.0	0.0	(1.0)	(1.0)	0.0	0.0	0.0	0.0	0.0	589.0
Total Revenues	106,916.0	102,874.0	98,368.0	92,793.0	81,741.0	79,919.0	79,139.0	79,591.0	67,714.0	65,179.0	67,351.0	68,361.0
Cost Of Goods Sold	55,712.0	51,425.0	48,568.0	45,346.0	40,046.0	40,358.0	40,986.0	41,522.0	25,476.0	23,737.0	25,331.0	26,033.0
Finance Div. Operating Exp.	1,065.0	1,087.0	1,110.0	1,040.0	1,011.0	1,044.0	1,210.0	1,132.0	704.0	577.0	534.0	534.0
Insurance Div. Operating Exp.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stock-Based Compensation	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pre-Opening Costs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
R & D Exp.	6,258.0	5,816.0	5,743.0	5,437.0	5,247.0	5,726.0	5,590.0	5,379.0	5,910.0	6,262.0	6,488.0	6,551.0
Depreciation & Amort.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Amort. of Goodwill and Intangibles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Impair. of Oil, Gas & Mineral Prop.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gross Profit	50,139.0	50,362.0	48,690.0	46,407.0	40,694.0	38,517.0	36,843.0	36,937.0	31,534.0	30,865.0	31,486.0	31,794.0

You can change things like the Ticker of the company you want to analyze, the Time Period, and the Currency on this template. To change the Ticker, click on cell C2 and type the Ticker of any company. Since I want to analyze Amazon, I type NASDAQ: AMZN, and the template will show you the financials of Amazon.

AMAZON.COM, INC. (NASDAQ:AMZN) S&P Capital IQ

Period Date	Fiscal Year Ended											LTM
	12/31/2011	12/31/2012	12/31/2013	12/31/2014	12/31/2015	12/31/2016	12/31/2017	12/31/2018	12/31/2019	12/31/2020	12/31/2021	
Revenues	48,077.0	61,093.0	74,452.0	88,988.0	107,006.0	135,987.0	177,866.0	232,887.0	280,522.0	386,064.0	469,822.0	469,822.0
Finance Div. Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Insurance Div. Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gain(Loss) on Sale Of Assets (Rev)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gain(Loss) on Sale Of Invest (Rev)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Interest And Invest. Income (Rev)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Revenues	48,077.0	61,093.0	74,452.0	88,988.0	107,006.0	135,987.0	177,866.0	232,887.0	280,522.0	386,064.0	469,822.0	469,822.0
Cost Of Goods Sold	37,288.0	45,971.0	54,181.0	62,752.0	71,651.0	88,265.0	111,934.0	139,156.0	165,536.0	233,307.0	272,344.0	272,344.0
Finance Div. Operating Exp.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Insurance Div. Operating Exp.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stock-Based Compensation	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pre-Opening Costs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
R & D Exp.	2,909.0	4,564.0	6,565.0	9,275.0	12,540.0	16,085.0	22,620.0	28,837.0	35,931.0	42,740.0	56,052.0	56,052.0
Depreciation & Amort.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Amort. of Goodwill and Intangibles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Impair. of Oil, Gas & Mineral Prop.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gross Profit	10,789.0	15,122.0	20,271.0	26,236.0	35,355.0	47,722.0	65,932.0	93,731.0	114,986.0	192,767.0	197,478.0	197,478.0

This was just one of the many templates available at Capital IQ.