Research example: Procter & Gamble and industry

VISION/MISSION STATEMENT OF FIRM

Company website

Also look at the Annual Report often located on the company website.

Sometimes, a company’s vision/mission statement may not be indicated on the company website or annual report. If that’s the case, you can try using Business Source Complete and Factiva to locate articles. A sample search might look like PROCTER AND GAMBLE AND “MISSION STATEMENT”. Or try PROCTER AND GAMBLE AND VISION. (Remember to change the Date field in Factiva to All Dates.)

COMPETITIVE ADVANTAGE OF FIRM

Academic, trade and news articles

Use Business Source Complete and Factiva to find articles. Try searches such as PROCTER AND GAMBLE AND “COMPETITIVE ADVANTAGE”.

INDUSTRY ANALYSIS

First Research

Click on the CONTINUE button. Click on another Continue button. Next click on the orange Submit button. Do a search for your industry in the keyword box.

Watch this demonstration video
Passport
On the top of the screen, select one of the choices under Industries. Under COUNTRY REPORTS, use SELECT A CATEGORY drop menu and select an industry. Also use SELECT A GEOGRAPHY drop menu and select a region/country. Click on GO.
Watch this demonstration video

Mergent Online
Click on Industry Analysis. Select an Industry and Region (note: these industry reports are presented at the regional level [eg. North America] and are very current; these regional reports also cover specific countries [eg. United States]). Click on Search.
Watch this demonstration video

BENCHMARKING EXERCISE

Mergent Online (compare with other companies in the same industry)
Type name or ticker of company. Click on company name. Next, click on Competitors. You will get a list of companies ranked by revenues against the U.S. market. You may also get a list of ranked companies in the global market by clicking on “Public Global”.
Watch this demonstration video

First Research (compare with industry)
Click on the CONTINUE button. Click on another Continue button. Next click on the orange Submit button. Do a search for your industry in the keyword box. Click on Financial Information in the left margin.
Watch this demonstration video

CORPORATE STRATEGY OF FIRM

Company 10-K report
A 10-K report is useful for collecting information on the firm’s current business structure and activities, corporate strategies as well as financial performance.

Foreign companies that trade on the U.S. market (eg. Honda Motor on NYSE) file 20-F reports.
**Mergent Online**
Click on Government Filings. Under Company Search, type name or ticker of company; under Filing Date Search, select last 12 months; under Filing Type, use drop-down menu and select 10-K; select Foreign to get the 20-F.
*Watch this demonstration [video]*

**U.S. Securities and Exchange Commission**
Click on Company Filings in the left margin and do a search for company. Click on the CIK number to view company filings which includes the 10-K or 20-F.

Carol Fang / June 2019