Capital IQ – Excel Plug-in Formula Builder Basics

What is the Formula Builder? The S&P Capital IQ Excel Plug-in is a tool that will allow you to populate and update your spreadsheets with financial, market, transaction, macroeconomic and company data using unique Capital IQ formulas. The Formula Builder is a wizard designed to assist with creating Capital IQ formulas.

Access the Formula Builder Open Excel, log-in to Capital IQ:

Right click cell > Insert Formula OR Capital IQ Toolbar > Formula Builder

Create a Basic Formula

Select a company or market indicator > Enter a ticker, company name or click on the magnifying glass to search.

Select the data set (e.g. Financials > Income Statement > Total Revenue). Or search Data Item Keyword.

Select the period that applies.

Relative Periods
- IQ_LTM = Last 12 Months
- IQ_FY = Fiscal Year
- IQ_FQ = Fiscal Quarter
- IQ_CH = Calendar Half
- IQ_YTD = Year-to-date
- IQ_NTM = Next 12 Months
- IQ_CY = Calendar Year
- IQ_CQ = Calendar Quarter

Absolute Period Types
- FY#### = e.g. FY2012
- CY#### = e.g. CY2012
- FQ#### = e.g. FQ12012
- CQ#### = e.g. CQ12012
- FH#### = e.g. FH12012
- CH#### = e.g. CH12012

Click Add Formula. Choose Formula Layout to display data Across a Row or Down a Column.

Select Apply to add the formula into your worksheet.