<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 ISIS Introduction</td>
<td>3</td>
</tr>
<tr>
<td>1.1 Installation Requirements</td>
<td>3</td>
</tr>
<tr>
<td>1.2 Getting Started</td>
<td>3</td>
</tr>
<tr>
<td>2.0 Searching ISIS</td>
<td>5</td>
</tr>
<tr>
<td>2.1 Searching by Company Name</td>
<td>6</td>
</tr>
<tr>
<td>2.2 Searching by Geographical location</td>
<td>6</td>
</tr>
<tr>
<td>2.3 Searching by Industry</td>
<td>7</td>
</tr>
<tr>
<td>2.4 Searching by Employees</td>
<td>8</td>
</tr>
<tr>
<td>2.5 Searching by Financials</td>
<td>8</td>
</tr>
<tr>
<td>2.6 Searching by Ratings</td>
<td>9</td>
</tr>
<tr>
<td>2.7 Searching by Ownership Data</td>
<td>10</td>
</tr>
<tr>
<td>2.8 Searching M&amp;A deals</td>
<td>11</td>
</tr>
<tr>
<td>2.9 Searching for Listed and Unlisted companies</td>
<td>12</td>
</tr>
<tr>
<td>2.10 Searching for Active or Inactive companies</td>
<td>12</td>
</tr>
<tr>
<td>2.11 Searching for Board members &amp; Officers</td>
<td>13</td>
</tr>
<tr>
<td>2.12 Searching for Managing Agent or Underwriters</td>
<td>14</td>
</tr>
<tr>
<td>2.13 Searching Accounting Data</td>
<td>14</td>
</tr>
<tr>
<td>2.14 Searching for Updated Reports</td>
<td>14</td>
</tr>
<tr>
<td>2.15 Saving Search Strategies &amp; Company Sets</td>
<td>15</td>
</tr>
<tr>
<td>3.0 Displaying a List of Companies</td>
<td>15</td>
</tr>
<tr>
<td>3.1 Creating a List Format</td>
<td>16</td>
</tr>
<tr>
<td>4.0 Displaying a Company Report</td>
<td>17</td>
</tr>
<tr>
<td>4.1 Creating a Report Format</td>
<td>18</td>
</tr>
<tr>
<td>5.0 Exporting Company Information</td>
<td>18</td>
</tr>
<tr>
<td>6.0 User Support</td>
<td>19</td>
</tr>
</tbody>
</table>
1.0 ISIS Introduction

ISIS contains comprehensive reports on some 6,000 insurance companies worldwide (1,900 US and 4,100 non US companies) with standardised and detailed financials (up to 9 years), ownership information, ratings, stock price data, and news. ISIS contains 2,000 Life, 4,200 Non-life, 450 Composite and 150 Lloyd’s Syndicates statements.

1.1 Installation Requirements

The minimum system requirements to run ISIS are:

- Access to the Internet using either Internet Explorer version 5 or Netscape Navigator 4
- Windows 95, 98, 2000 or NT 4.0 or higher
- VGA Colour Screen
- A username and password provided by Bureau van Dijk

1.2 Getting Started

1. Start your Internet browser and go to [http://isis.bvdep.com](http://isis.bvdep.com). The following login screen will appear.

   [Registered users login]
   Username:
   Password:
   Store Password: [OK]

2. Enter your username and password in the appropriate boxes. Click on OK to begin.

   **Note**: Upon entering the product, you can choose between the Quick Search and the Expert Search using the arrows in the upper left of the search window.

3. The Quick Search, shown below, allows you to screen ISIS using any combination of the six search criteria - **Company Name**, **Ticker**, **Location**, **Specialisation**, **Size**, **Company type**, **Ownership**, **M&A Deals**, **Status**, **News**, **Top Companies** - in a single search step.
4. The **Expert Search** window, shown below, allows more search options, news, and segmentation tables.

Tabs and icons across the top of the screen are defined below:

- **Search**
  - Allows access to the various criteria for searching the database and displays a summary of any criteria used.

- **List**
  - Displays a list of companies identified by the search criteria

- **Company Report**
  - Displays full company reports for any selected companies.
2.0 Searching ISIS

There are two types of searches available on ISIS: the Quick Search and the Expert Search. This ISIS QuickGuide will focus on using the Expert Search, which provides detailed search and analysis options.

You can search ISIS using one or multiple options from the list of search criteria. After each search step is completed, the search criterion will be listed in the Search Summary window. By default, the steps are combined (using the AND Boolean operator). Users can change the search or enter their own search logic by clicking the All ORs or Other Boolean Search radio buttons at the bottom of the Search Summary.

1. To delete a search step, click on the ⊗ next to the step you wish to remove.
2. To modify a search step, click the ∅ next to the step you wish to change.
3. To edit the search logic, click the Boolean options All ANDs, All ORs, Other Boolean Search. Using this, you can combine or exclude search steps by entering the operators AND, OR, AND NOT between search steps then clicking OK at the end of the line.
2.1 Searching by Company Name

1. Click on **Company Name** from the list of search criteria enter a company name, or part of it in the space provided.

2. Click on **Search**. The index of company names will refresh showing companies matching the text entered.

3. Highlight the companies you require and click on > to move them to the companies selected area. You can repeat the above process to find and select more companies.

4. Click on **OK** and the **Search Summary** screen will appear showing the criteria used and the options to continue your search or display the search results.

---

2.2 Searching by Geographical location

1. To search for companies by geographic criteria, click on + or **Geographic location** in the list of search criteria. Then select either **World Regions/ Countries** or **Cities**.

2. To select the sub-criterion you wish to use in your search, check the box next to the region or country desired.
3. Click on OK and the search will be displayed in the Search Summary screen:

2.3 Searching by Industry

1. To search by industry classification click Industry from the search criteria.

2. You can search by Template, Company class, Reinsurance companies, or perform at Text search. Mark the box next to the desired option.

Note: - For the Reinsurance companies only search, you need only click OK.
- For the **Text Search**, you can enter as many character strings as you like, and mark the boxes to specify which text areas to include in the search (i.e. company overview, note to the balance sheet, etc.)

3. Click on **OK** and the search step will be displayed in the **Search Summary** screen.

### 2.4 Searching by Employees

1. To search for companies by the number of employees click on **Employees** from the list of search criteria.

2. Complete all areas of the search window, including parameters for years, values or percentages, currency, amount and quartiles.

3. Click on **OK** and the search step will be recorded in the Search Summary.

### 2.5 Searching by Financials

1. To search for companies by financial criteria click the **+** or **Financials**, from the list of search criteria. Then expand the **Key Financials** or **Key Ratios** criteria to select one of the primary financial items you wish to screen.

   **Note:** If you don’t see the financial item you wish to screen, click on **All Financials** or **All Ratios** to select a section of the report and choose the precise item.

2. Complete all areas of the search window, including parameters for years, values or percentages, currency, amount and quartiles.
3. Click on **OK** and the search step will be recorded in the Search Summary screen.

### 2.6 Searching by Ratings

1. To search for companies by their Moody’s or Fitch ratings, click **Ratings**, from the list of search criteria. For each of these ratings companies, you can choose the rating you wish to screen or select all companies that have been rated by Fitch or Moody’s.

2. Mark the box next to the rating figures you wish to include in your search.

3. Click on **OK** and the search step will be recorded in the Search Summary screen.
2.7 Searching by Ownership Data

You can search the ownership data on ISIS by clicking Ownership in the list of search criteria, then choosing either Ownership status, Shareholders, Subsidiaries or Affiliates of the selected companies. Examples for each of these searches are shown below.

1. **Ownership status** offers the following search options: Independent or Dependent companies, Ultimate Owners, Companies owned by an Ultimate Owner, Subsidiaries of quoted companies. In each of these search windows, you have a Help button to further explain terminology, etc.

2. Select Shareholders if you wish to search the characteristics of a company’s shareholders including Name, Country and Name, Foreign companies, Type and % of ownership, or the Number of shareholders.

    ![Shareholders Search Example]

    **Note:** The same options exist for the Subsidiaries search.
3. Select **Affiliates of selected companies** to perform the following searches of selected companies: **Select shareholders, Select subsidiaries, Exclude subsidiaries of selected companies. Affiliates of a given company**, click **Continue**. Then, specify characteristics of the affiliates to search and click **OK**.

### 2.8 Searching M&A deals

1. Using this option you are able to search for companies on ISIS that have been involved in M&A deals. To begin, click **M&A deals** from the list of search criteria.

2. Complete all areas of the resulting window necessary by marking the box next to the criteria desired. Specify whether the company was the Bidder, Target or Vender, the date of the deal, deal value, multiples, and deal type as shown below.
3. Click on OK and the search step will be recorded in the Search Summary screen.

### 2.9 Searching for Listed and Unlisted companies

1. To search for publicly listed or unlisted companies, click on Listed/ Unlisted from the search criteria.
2. Select either Listed, Unlisted or Delisted.

3. Click on OK and the search step will be displayed in the Search Summary screen.

### 2.10 Searching for Active or Inactive companies

1. Click on Active/ Inactive from the search criteria to select companies from with various active and inactive statuses.
2. Mark the box next to the desired status(es).
3. Click on OK and the search step will be displayed in the Search Summary screen.

**2.11 Searching for Board members & Officers**

1. Click on **Board members & Officers** from the list of search criteria and enter the name (or part of it) for the individual you are seeking in the text box.

   **Note:** In many cases, the database includes only initials and surname of individuals, so it is best to search using the surname, if possible.

2. Select the name or names from the list and click > to send it to the selected items area. Repeat this process until you have moved all the individuals of interest to the right.

3. Click on OK and the search step will be displayed in the Search Summary screen.
2.12 Searching for Managing Agent or Underwriters

1. Click on Managing Agent / Underwriters from the list of search criteria and enter the name (or part of it) for the individual you are seeking in the text box. Then click on either Managing Agent or Underwriter.

2. Continue as described in the Searching for Board Members & Officers section.

2.13 Searching Accounting Data

1. Click on Accounting data in the list of criteria to limit your search to selected Templates, Country Models, Reporting currencies, Year of last available accounts, Years of available accounts, Number of years with available accounts, or Closing month of accounts.

2. Mark the box next to the desired years or templates, or choose the currency from the drop down menu.

4. When all items have been selected, click on OK and the search step will be displayed in the Search Summary screen.

2.14 Searching for Updated Reports

1. To search for companies with updated information in their reports, click on Updated reports from list of search criteria.

2. Select a time period from the drop down menu then mark the box next to the report section(s) you wish to screen for new data.
3. Click on OK and the search step will be displayed in the Search Summary screen.

### 2.15 Saving Search Strategies & Company Sets

**Search Strategies:** Any sequence of search steps (a search strategy) can be saved and reused at a later date. This allows you to constantly monitor companies that meet your search criteria. Of course, results may differ each time the search is made as company accounts are updated and added to the database.

1. To save a search strategy select Save the search button from the bottom of the Search Summary window. From here you can simply Save the search (to the ISIS server) or Save to disk (which will place a file in the location you specify on your computer or network). Enter a name for your search and click Save.

2. To load the saved search strategy select Load a strategy from the list of search criteria, locate the name of the search strategy from the list presented, or Load from disk to select one you have saved on your computer or network. Click OK.

**Company Sets:** a company set differs from a search strategy because using it at a later date will NOT produce different results. The saved set is specific to the companies matching your search criteria and will not be affected as company information is updated.

1. To save your company set, click the Save a file button from the bottom of the Search Summary window. From here, you can Save the set (to the ISIS server) or Save to disk (which will place a file in the location you specify on your computer or network). Enter a name for your search and click Save.

2. To load the saved file simply select Load a file from the list of search criteria, locate the file of interest and click OK.

### 3.0 Displaying a List of Companies

1. At any time during a search it is possible to display the full list of the companies matching your search criteria by clicking on List.
2. Buttons along the bottom of the screen enable you to review the list of companies (**Next 25, End, etc.**), **Save**, **Sort**, **Format, Delete** companies or make this a **Peer Group** of companies.

3. To access a company report, simply click on the company name in the list.

   **Note:**
   - Access the list of news stories attached to a company by clicking the **Reuters icon** when it appears next to the company name.
   - Access a standard **Peer Report** for a company by clicking the blue report icon before the company name.
   - Access an overview report, including graphs, for a company by clicking the red report icon before the company name.

### 3.1 Creating a List Format

List formats refer to the items of company data displayed alongside each company name in a list. Many user-defined list formats, each with various items of data, can be created and stored to use at a later date.

1. While viewing a **List**, click the **Format** button at the bottom of the screen. A list of saved list formats will be displayed. Click on the **New** button to design a new one.

2. Select a Template from which to work or use **All Templates**. Then choose a report section from the pull down menu. Highlight the items of data you require and click on > to transfer the data to the selected fields list. Repeat the process until all required items are selected.

   **Note:** For all financial items, you must select the **Time period, Currency and Unit.**
3. Type a name into the **Format Name** text box so that it can be recalled at a future date. If you do not enter a name for formats, **ISIS** will automatically name them format0, format1 etc.

4. Click the **Save** button and your new format will be added to the list of available formats.

**4.0 Displaying a Company Report**

1. At any time during a search it is possible to display the full information available for the companies matching your criteria by clicking on **Company Report** at the top of your screen.
2. To move through the group of companies, you can use the < > icons in the lower left of the screen.

   **Note:**
   - The Alert button enables you arrange for emails to be sent to you when new information on the displayed company is available.
   - Access to the various report sections is available from the list at left.

### 4.1 Creating a Report Format

Report formats refer to the sections of information included in a company report, such as **Header, Ratings, Key financials, Reuters News**, etc.

1. From the company report click the **Format** button at the bottom of the screen. Any previously created formats that have been saved to your password will be displayed, in addition to the default format. Click on the **New** button.

2. Highlight the section(s) you require (e.g. the Header) and click on > so the section appears in the selected sections box. You can repeat this process until all required sections are selected.

3. Give your format a name so it can be identified later. If you do not enter a name for your formats, **ISIS** will automatically name them format0, format1 etc.

4. Click the **Save** button and your new format will be added to the list of available formats.

### 5.0 Exporting Company Information

Data can be exported from **ISIS** for use in other software programs including spreadsheets, databases, and word processors. Exports can be performed from lists and company reports.

1. Click on **Export** and the following screen will be displayed:
2. Select the program to which you wish to export and specify the companies to include (all or a specific range). Click on Export again and the data will be transferred.

6.0 User Support

Bureau van Dijk offers all users full support for both data and technical questions. For assistance, please visit our client support website support.bvdep.com or contact your account manager or the nearest Bureau van Dijk office:

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<th>Location</th>
<th>Email</th>
<th>Telephone</th>
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<tbody>
<tr>
<td>Austria</td>
<td><a href="mailto:help.wien@bvdep.com">help.wien@bvdep.com</a></td>
<td>43 (1) 958 10 84</td>
</tr>
<tr>
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