Getting Started with
Zephyr

Zephyr

• information on mergers, acquisitions and other deals worldwide
• includes Initial Public Offering (IPO), private equity and venture capital deals and rumours
• the most comprehensive data is available from the end of November 2003 onwards

This guide covers:

A. Creating a list of deals that fit your criteria and finding information about those deals and the companies involved (see p. 2)

B. More help and referencing
(see p. 8)

Important Note

This guide does not cover everything that Zephyr can do. Please see ‘More help’ (p. 8) for further guidance.

Accessing Zephyr

Go to http://library.soton.ac.uk

Click on Subject Guides> Business, Accounting, Finance, Management and Marketing> Databases> Company & Financial Information

You will then need to select ‘University of Southampton’ and log in with your University username and password.
A. Creating a list of deals that fit your criteria and finding information about those deals and the companies involved

Click on GO for ZEPHYR ADVANCED

There are two stages in this process:

1. Create a list of deals that fit your criteria
2. Find information about those deals and the companies involved

1. You can use any of the criteria shown on the homepage to create a list of deals. For example, you can choose deals by ‘Deal type’, ‘Deal Status’, ‘Time period’, ‘Geography’, ‘Industry’ or ‘Company financials’.
In this example, we will create a list of acquisitions involving transport companies the UK.

To limit to acquisitions, hover over ‘Deal types & methods of payment’ and click on ‘Deal type’.

Check the box next to Acquisition.

‘Acquisition’ will appear in the right-hand window.

If necessary, select other deal types and check that they appear in the right-hand window.

When you have finished, click on the orange OK button.
The results of the search for acquisitions is shown at the bottom of the screen. There are 596,905 acquisitions included on Zephyr.

Next we will limit to acquisitions of companies in the transport industry. Hover over ‘Industry’ and click on ‘Major sectors’.

Check the box next to Transport.

You can also specify whether the ‘Acquiror’ company, ‘Target’ company or ‘Vendor’ should be in the transport industry. In this example either the acquiror OR the target must be in the transport industry.

When you have finished, click on the orange OK button (bottom right).
What does ‘Vendor’ mean?
The definition of Vendor, and other terms, is available in Zephyr’s Glossary under Help> Zephyr help.
Vendor is defined as:
The entity that is offering the Target company for sale, etc. For example, when Company A buys 10 per cent of Company B from Company C,
- Company A is the Bidder
- Company B is the Target
- Company C is the Vendor

To limit to the UK, hover over ‘Geography’ and click on ‘Country’. Check the box next to United Kingdom. You can also specify whether the ‘Acquiror’ company, ‘Target’ company or ‘Vendor’ should be based in the UK.

When you have finished, click on the orange OK button (bottom right).

You can now see that there are 927 acquisitions involving transport companies, where both the acquirer and target companies are based in the UK.

At this stage you could limit the list further using the criteria in the black box above.

When you have finished, click on View list of deals.
2. You will now see the list of deals. The first 25 are displayed on page 1. You can navigate through the list using the arrows or by entering a page numbers.

Basic information including ‘Deal status’ and ‘Deal value’ is displayed.

If you want to change the list of deals, return to stage 1 (p. 2 of this guide). For example, if you want only completed deals, limit by ‘Deal status’.

If you would like to display/download other information, click on Columns.

Under Your selection click on the boxes next to the variables you don’t need. They will disappear.

Under Options use the + buttons to expand the lists and find the variables you need.

Note that data is available for deals, companies and advisors.
In this example, we will download the completion date and deal financing information.

Select the ‘Deal’ tab.

Click on the + symbol next to ‘Deal structure and dates’. Check the boxes next to the variables you want.

The selected variables will appear on the right under Your selection.

When you have finished selecting variables, click on the orange OK button.

You will now see the selected variables in the list.

Click on Export to download the list to Excel.
B. More help and referencing

More help and information about how to reference Zephyr is available at: http://library.soton.ac.uk/tutorials/zephyr

And if that fails...
Email the Library at libenqs@soton.ac.uk

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