SDC Platinum

VentureXpert Quick Start FAQ Guide for New Users

Viewing this document

To navigate through this document, click on the icon, or choose **Bookmarks and Page** from the **View** menu. This will display a column to the left of your document window with Bookmarks for each topic. Bookmarks with triangles have subtopics underneath them. Click on the triangle to reveal the subtopics. To view any topic, click on it's Bookmark.

Contents of this document

This document contains the following topics:

Note

This quick start guide assumes you have logged into SDC Platinum to access the VentureXpert product and that you have little or no experience using the software. It will guide you through frequently asked questions for five of the VentureXpert product databases. Each answer is presented as a list of search and report steps. **Please note that normal database charges apply when running these reports.**

Company Investments Database – Question 1

In '97 how much money was invested at each stage in California software companies?

Report Output for Request 4

Venture Economics Information Services
Investment Profiles Report
Disbursements per Deal by Stage Level 3
01/01/97 to 12/31/97
Rounds 1 to 99

Deal Stage Level 3	NUM OF DEAL	PCT OF DEAL	SUM OF INV	PCT OF INV	AVG PER DEAL	MED PER DEAL
Early Stage	25	7.0	63.1	3.3	2.5	4.0
Seed	53	14.9	112.5	5.8	2.1	0.8
Startup	29	8.1	137.4	7.1	4.7	3.1
First Stage	70	19.7	256.3	13.2	3.7	2.6
Expansion	69	19.4	363.4	18.7	5.3	2.9
Second Stage	89	25.0	510.4	26.3	5.7	7.1
Third Stage	52	14.6	340.7	17.6	6.6	10.9
Bridge	1	0.3	0.4	0.0	0.4	0.4
Acq. for Expansion	2	0.6	33.0	1.7	16.5	16.5
Turnaround	2	0.6	5.0	0.3	2.5	2.5
Secondary Purchase	2	0.6	2.7	0.1	1.4	1.4
Open Market Purchase	21	5.9	34.7	1.8	1.7	1.0
Bridge Loan	55	15.4	79.8	4.1	1.5	1.5

Request 4 | Session Details

This report was made using the steps listed on the following page.

Search Steps

- At the Database Selection window VentureXpert tab, select **Company Investments** and click **OK**.
- At the Navigation Method window, select **Search Menu** and click **OK**.
- At the Financing Round Date window, enter **From: 1997 To: 1997** and click **OK**.
- At the Search Items window Company Characteristics tab, highlight **Company State** and click **Open**.

  Double click on **California** and click **OK**.
- At the Search Items window Company Characteristics tab, highlight **Company VE Primary Industry Sub-Group 1** and click **Open**.

  Right mouse click on **All Computer Software,** then choose **Select Highlighted Item(s)** and click **OK**.
- At the Search Items window click **Close**.
- Click the **Execute** Icon located on the tool bar to execute your search request.

Report Steps

- On the top Menu bar, click **Report** / **Open Existing** / **SDC Standard**.
- At the Standard Report window Round Investment Summary tab, highlight **Company Stage Level 3** and click **OK**.
- At the Report Options window Report Date tab, enter **From Date: 01/01/97 To Date: 12/31/97** and click **OK**.
- Click the **Execute** Icon located on the tool bar to execute your report request.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Main Session window.

Company Investments Database – Question 2

How much money was invested in the venture capital industry from 1995 to today?

Report Output for Request 3

Venture Economics Information Services
Investment Profiles Report
Disbursements per Company by Year
01/01/95 to 09/02/98
Rounds 1 to 99

Company Disbursement Year	NUM OF COMP	PCT OF COMP	SUM OF INV	PCT OF INV	AVG PER COMP	MED PER COMP
1995	1319	27.9	6062.0	17.3	4.6	0.5
1996	1918	40.6	9508.1	27.2	5.0	9.0
1997	2394	50.6	13022.1	37.3	5.4	3.8
1998	1167	24.7	6365.1	18.2	5.5	7.0
TOTAL	6798		34957.2		5.1	1.6

Request 3 | Session Details

This report was made using the steps listed on the following page.

Search Steps

- At the Database Selection window VentureXpert tab, select **Company Investments** and click **OK**.
- At the Navigation Method window, select **Search Menu** and click **OK**.
- At the Financing Round Date window, enter **From: 1995 To: TODAY** and click **OK**.
- At the Search Items window Investment Type tab, **highlight Standard US Venture Capital Disbursements** and click **Open**.

  Accept the default of **Select All Standard US Venture Capital Disbursements** and click **OK**.
- At the Search Items window click **Close**.
- Click the **Execute** Icon located on the tool bar to execute your search request.

Report Steps

- On the top Menu bar, click **Report** / **Open Existing** / **SDC Standard**.
- At the Standard Report window Round Investment Summary tab, highlight **Disbursement Year** and click **OK**.
- At the Report Options window Report Date tab, enter **From Date: 01/01/93 To Date: mm/dd/yy** (enter the current date in the To Date field) and click **OK**.
- Click the **Execute** Icon located on the tool bar to execute your report request.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Main Session window.

Fund Commitments Database – Question 1

How much money was committed to buyout & mezzanine funds from 1990 to 1997?

Report Output for Request 2

Commitments per Fund by Fund Raising Year
Period: 01/01/90 to 12/31/97

Fund Raising Year	NUM OF FUND	TOTAL TARGET ($ MIL)	PERIOD AMOUNT RAISED ($ MIL)	TOTAL AMOUNT RAISED ($ MIL)
1990	58	4860.5	8031.2	60112.3
1991	32	736.7	4393.9	64506.2
1992	61	9393.7	11248.4	75797.0
1993	83	12147.1	17561.6	93347.6
1994	107	20097.5	21729.1	115112.4
1995	108	26244.0	25943.3	141054.7
1996	97	21967.0	29649.0	170691.9
1997	108	41377.3	43803.7	214496.2
TOTAL	654	136823.8	162360.2	935118.4

Request 2 | Session Details

This report was made using the steps listed on the following page.

Search Steps

- At the Database Selection window VentureXpert tab, select **Fund Commitments** and click **OK**.
- At the Navigation Method window, select **Search Menu** and click **OK**.
- At the Private Equity Fund Type window, select **US Buyout and Mezzanine Funds** and click **OK**.
- At the Search Items window click **Close**.
- Click the **Execute** Icon located on the tool bar to execute your search request.

Report Steps

- On the top Menu bar, click **Report** / **Open Existing** / **SDC Standard**.
- At the Standard Report window Commitment Summary tab, highlight **Fund Raising Year** and click **OK**.
- At the Report Options window Report Date tab, enter **From Date: 01/01/90 To Date: 12/31/97** and click **OK**.
- Click the **Execute** Icon located on the tool bar to execute your report request.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Main Session window.

Fund Commitments Database – Question 2

For funds formed between 1990 and 1997, how much money was raised by each fund stage in 1997?

Report Output for Request 3

Venture Economics Information Services
Fund Commitment Analytics Report
Commitments per Fund by Stage Focus
01/01/97 to 12/31/97

Fund Stage Focus	NUM OF FUND	PCT OF FUND	SUM OF INV	PCT OF INV	AVG PER FUND	MED PER FUND
Buyouts	90	35.2	38840.8	69.6	431.6	175.0
Balanced Stage	62	24.2	5742.5	10.3	92.6	48.0
Early Stage	57	22.3	3439.5	6.2	60.3	35.7
Later Stage	29	11.3	3010.1	5.4	103.8	75.0
Mezzanine Stage	10	3.9	2199.9	3.9	220.0	55.0
Unknown	5	2.0	1740.0	3.1	348.0	238.0
Other Private Equity	3	1.2	841.0	1.5	280.3	295.0
TOTAL	256		55813.8		218.0	2250.0

Request 3 | Request 4 | Session Details

This report was made using the steps listed on the following page.

Search Steps:

- At the Database Selection window VentureXpert tab, select **Fund Commitments** and click **OK**.
- At the Navigation Method window, select **Search Menu** and click **OK**.
- At the Private Equity Fund Type window, select **All US Private Equity Funds** and click **OK**.
- At the Search Items window Fund Characteristics tab, highlight **Fund Vintage Year** and click **Open**.

  At the Fund Vintage Year window, highlight **1997 through 1990**, right mouse click and **choose Select Highlighted Item(s)** and click **OK**.
- At the Search Items window click **Close**.
- Click the **Execute** Icon located on the tool bar to execute your search request.

Report Steps:

- On the top Menu bar, click **Report** / **Open Existing** / **SDC Standard**.
- At the Standard Report window Commitment Analytics tab, highlight **Fund Stage Focus** and click **OK**.
- At the Report Options window Report Date tab, enter **From Date: 01/01/97 To Date: 12/31/97** and click **OK**.
- Click the **Execute** Icon located on the tool bar to execute your report request.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Main Session window.

Fund Performance Database – Question 1

As-of 03/31/98, what was the 10-year return to buyout funds?

Report Output for Request 1

Venture Economics Information Services
Performance Express Report
Investment Horizon Performance as of 03/31/98
Calculation Type: Pooled IRR
Funds Formed 1969 to 1998

FUND TYPE	3MO	6MO	9MO	1YR	3YR	5YR	10YR	20YR
EARLY_SEED_VC	3.6	9.5	24.1	38.2	51.4	34.6	18.9	17.8
SEED_VC	4.0	43.3	58.2	29.2	34.1	27.6	15.3	12.2
EARLY_STAGE_VC	3.6	8.1	22.4	38.8	54.0	36.0	19.6	19.0
BALANCED_VC	5.6	4.6	16.7	24.0	36.3	25.9	13.5	12.7
LATER_STAGE_VC	8.6	10.6	28.5	39.6	36.8	33.8	21.5	18.0
ALL_VENTURE	5.1	7.4	21.2	31.5	41.9	29.7	16.0	14.6
SMALL_BUYOUTS	-1.7	0.9	7.6	16.3	20.8	22.5	26.8	25.1
MED_BUYOUTS	7.9	19.1	27.7	30.2	17.2	17.2	15.3	20.2
LARGE_BUYOUTS	3.8	10.2	11.8	26.1	22.6	23.2	22.9	22.8
MEGA_BUYOUTS	4.0	12.0	11.8	17.2	15.5	19.0	15.1	15.1
ALL_BUYOUTS	3.9	10.9	13.4	21.4	18.5	19.7	18.5	20.0
MEZZANINE	4.0	9.8	5.6	13.9	16.1	14.8	11.0	11.6
ALL_PRIV_EQU	4.4	9.7	16.4	25.3	26.5	23.5	17.3	16.8

Request 1 | Session Details

This report was made using the steps listed on the following page.

Express Report Steps

- At the Database Selection window VentureXpert tab, select **Fund Performance** and click **OK**.
- At the Navigation Method window, select **Express Reports** and click **OK**.
- At the Open SDC Wizard window, highlight **Performance 4–Investment Horizon Performance** and click **Open**.
- At the Date window, select **1st Qtr, 1998** and click **Finish**.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Database Selection window.

Fund Performance Database – Question 2

What is the performance by fund stage category for funds that have an internal rate of return (IRR) of at least 50%?

Report Output for Request 3

```
                 Venture Economics Information Services
            Performance Database Fund Characteristics Report
                         by Fund Stage Focus

Total Fund Capitalization for this Sample: $30143.1 Mil
==================================================================================
                               NUM   PCT      SUM   PCT    AVG    MED    MAX    MIN
Stage Focus                    FND   NUM      CAP   CAP    CAP    CAP    CAP    CAP
------------------------------ ---- ----- -------- ----- ------ ------ ------ ------
Balanced/Diversified Venture     48  34.3   2739.3   9.1   57.1   36.9  225.0    4.4
Early Stage Venture              28  20.0   2556.7   8.5   91.3   48.0  298.8    2.7
Unknown                          47  33.6  21978.0  72.9  467.6  114.9 2446.1   20.2
Later Stage Venture              12   8.6   1988.2   6.6  165.7  170.0  600.0   30.0
Unknown                           4   2.9    866.5   2.9  216.6  127.0  450.0  120.0
Seed Venture                      1   0.7     14.4   0.0   14.4   14.4   14.4   14.4

TOTAL                           140 100.0  30143.1 100.0  215.3   41.0 2446.1    2.7
==================================================================================
```

Request 3 | Session Details

This report was made using the steps listed on the following page.

Search Steps

- At the Database Selection window VentureXpert tab, select **Fund Performance** and click **OK**.
- At the Navigation Method window, select **Search Menu** and click **OK**.
- At the Private Equity Fund Type window, select **All US Private Equity Funds** and click **OK**.
- At the Search Items window Fund Characteristics tab, highlight **Internal Rate of Return** and click **Open**.

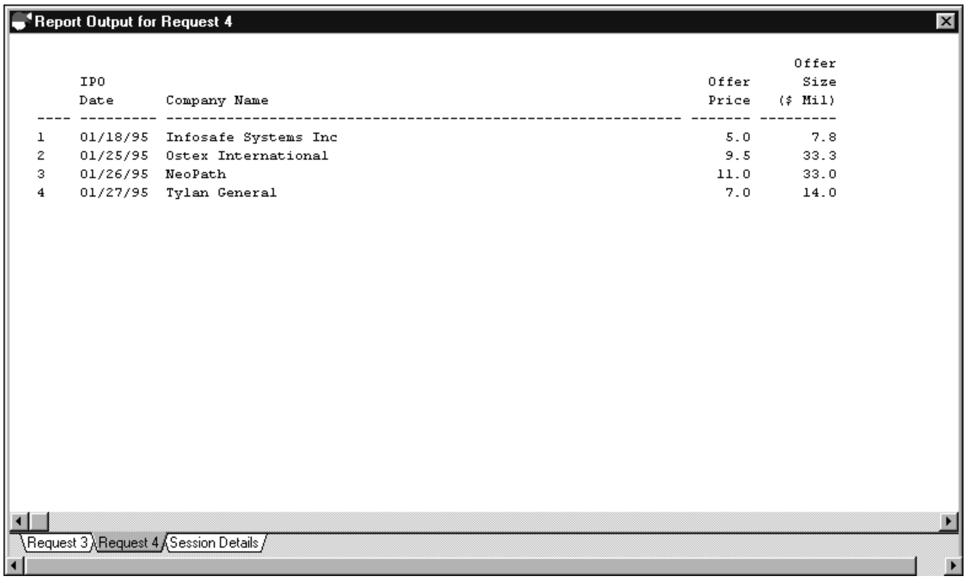
  At the Internal Rate of Return window, enter **Range of Values: 50 to HI** and click **OK**.
- At the Search Items window click **Close**.
- Click the **Execute** Icon located on the tool bar to execute your search request.

Report Steps

- On the top Menu bar, click **Report** / **Open Existing** / **SDC Standard**.
- At the Standard Report window Fund Characteristics tab, highlight **Fund Stage Focus** and click **OK**.
- At the Report Options window Save As tab, click **OK**.
- Click the **Execute** Icon located on the tool bar to execute your report request.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Main Session window.

Company Initial Public Offerings Database – Question 1

How do I get a list of '95-'97 venture-backed IPOs that includes the company name, IPO date, offer price and offer amount?



Report Output for Request 4

	IPO Date	Company Name	Offer Price	Offer Size ($ Mil)
1	01/18/95	Infosafe Systems Inc	5.0	7.8
2	01/25/95	Ostex International	9.5	33.3
3	01/26/95	NeoPath	11.0	33.0
4	01/27/95	Tylan General	7.0	14.0

Request 3 Request 4 Session Details

This report was made using the steps listed on the following page.

Search Steps

- At the Database Selection window VentureXpert tab, select **Company Initial Public Offerings** and click **OK**.
- At the Navigation Method window, select **Search Menu** and click **OK**.
- At the Offer Date window, enter **From: 1995 To: 1997** and click **OK**.
- At the Search Items window Company Type tab, highlight **Venture Backed Public Company** and click **Open**.

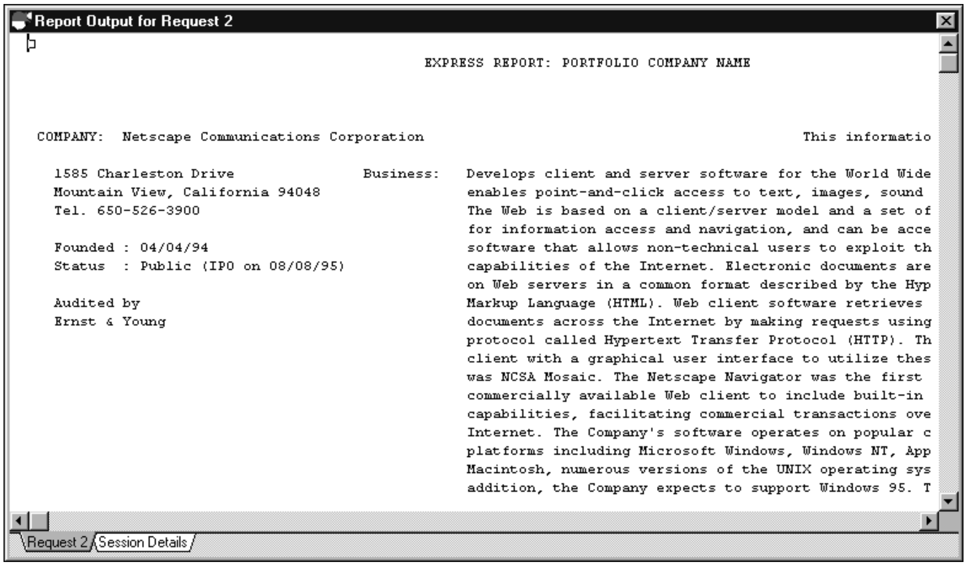
  Accept the default of **Select All Venture Backed Public Companies** and click **OK**.
- At the Search Items window click **Close**.
- Click the **Execute** Icon located on the tool bar to execute your search request.

Report Steps

- On the top Menu bar, click **Report** / **New Custom…**.
- At the Express Report Items window All Items tab, scroll down and:
  highlight **Line Counter** and click **Add Item**,
  highlight **Company Name** and click **Add Item**,
  highlight **Offer Date** and click **Add Item**,
  highlight **Offer Price ($)** and click **Add Item**,
  highlight **Offer Size ($ Mil)** and click **Add Item**.
  Click **OK**.
- Your items are listed in the Design Custom Report Format window. Click **OK**.
- At the Save Custom Report window, enter a custom report name and click **Save**.
- At the Report Options window:
  In the Titles and Options tab, enter report titles if you desire
  In the Sort tab, double-click on the Sort 1 field, then scroll down and select Offer Date
  Click **OK**.
- Click the **Execute** Icon located on the tool bar to execute your report request.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Main Session window.

Portfolio Companies Database – Question 1

How do I get a portfolio company report for a specific company?



This report was made using the steps listed on the following page.

Express Report Steps

- At the Database Selection window VentureXpert tab, select **Portfolio Companies** and click **OK**.
- At the Navigation Method window, select **Express Reports** and click **OK**.
- At the Open SDC Wizard window, highlight **Portfolio Company Name** and click **Open**.
- At the Portfolio Company window, **enter a company name** and click **Search**.
- **Double-click** the company(s) in the Portfolio Company window that you wish to report on.

  If you desire you can enter more company names, repeating the above Search and Double-click process.

  To view all the companies that you have selected, click the Selected icon located on the tool bar.
- Click **Next**.
- At the Transactions window, click **Next** to report on your company(s).
- At the Report Selection window, highlight **Comprehensive Portfolio Company Report** and click **Next**.
- At the Report Options window, enter new report titles or accept or delete the default title, then click **Finish**.
- On the top Menu bar, click **Document / Export/Save As…** or **Document / Print** to save or print your report.
- Click **Document / Close** to return to the Database Selection window.

General Questions

- Who can I contact if I am on the system and need help with my search or report criteria?

  You can call our Client Services help line at 973.622.5200 and one of our knowledgeable phone representatives will walk you through any SDC Platinum session, providing you efficient, accurate results. We have in-office support Mon-Fri from 9AM-8PM Eastern Standard Time, and support via pager on weekends and after hours. In either case, just dial the number above.

  Alternatively, if you have questions about the venture industry or interpreting the data you retrieve from our database, please call one of our Venture Economics senior staff members:

Toby Walters, Research Manager	973.645.9619
Michael Smith, Asst. Research Manager	973.645.9663
Lori Ann Neno, Asst. Research Manager	973.645.9674
Shannon Dolan, Sr. Research Analyst	973.645.9717
Manu Joglekar, Sr. Research Analyst	973.645.9648

- Who can I contact if I am experiencing technical difficulties with the SDC Platinum software?

  You can call our Client Services technical helpdesk at 973.622.5200, menu option 2, Mon-Fri from 9AM to 5PM Eastern Standard Time.

- Who do I contact if I find an error in any of my firm's data that appears in the VentureXpert database?

  Print out the report that contains the error(s), correct the information, and fax it to the attention of Toby Walters, Venture Economics Research Manager, at 973.622.1421.