Getting Started with PitchBook at Yale Library
PitchBook Overview
PitchBook: The leading resource for public and private market analysis

PitchBook is a financial technology company that helps professionals discover and execute opportunities with confidence and efficiency. We collect and analyze detailed data on the entire venture capital, private equity and M&A landscape—including public and private companies, investors, funds, investments, exits and people. Our data and analysis are available through our suite of products (the PitchBook Platform), industry news and in-depth reports.
Our data: Comprehensive coverage across public and private markets

1,028,000+ private companies
81,000+ public companies
956,000+ deals
260,000+ investors
42,000+ funds

• Financing histories
• Cap tables (stock information, ownership structure, etc.)
• Financials (revenue, balance sheets, filings)
• Executives
• Board members
• Investors
• Advisors/service providers
• Similar companies/competitors
• Social followers
• Web traffic
• News

• Balance sheets
• Cash flows
• Income statements
• Multiples
• Ratios
• Stock prices
• Fundamentals
• Equity research
• 18,000+ consensus estimates from 100+ countries

• Investors
• Pre- & post-money valuations
• Purchase price multiples
• Series terms
• Voting rights
• Stock information
• Advisors/service providers
• Cap tables

• Investments by industry & year
• Investments & acquisitions
• Exits
• Team
• Board seats
• Lead partners on deals
• Co-investors
• Limited partners
• Advisors/service providers
• Investment preferences

• Investments
• Industry focus
• Size
• Vintage year
• Limited partners & commitments
• Performance (IRR)
• Cash flow multiples (DPI, RVPI, TVPI)
• Dry powder
• Preferences
• Teamgoth
Our research process: Cutting-edge technology and dedicated people

It’s the combination that gives you the most comprehensive, in-depth and accurate data out there. (Not to mention, we’ve spent millions of hours researching the private markets.) Learn more about our process.

How we collect data

**Gather**
More than 650,000 web crawlers scan the internet—capturing relevant financial information from news articles, regulatory filings, websites, press releases and more.

**Organize**
Our natural language processing and machine learning technology organizes the data and filters out anything irrelevant.

**Calculate**
Our specialized data teams collect, calculate and verify key figures to build in-depth datasets with information you can’t find anywhere else.

**Communicate**
Our primary research team communicates directly with people involved in deals to validate information and gather hard-to-find details.

**Vet**
Our quality assurance team uses preventative validations, corrective validations and manual reviews to relentlessly vet every piece of data.
A Year of Innovation & Growth

Over the past year, we’ve expanded our data coverage and enhanced our product to better serve our clients.

YoY % change since 3Q 2017

Investors: +24%
Deals: +20%
Companies: +6%
Funds: +8%
People: +14%
LPs: +12%
SPs: +24%
Valuations: +22%

In the past year, the number of lenders available in PitchBook has increased by 146% from 3,100 firms to 7,800 firms.

Best-in-class private market data with enhanced public data

Global private market company data counts

Global public market company data counts

SEATTLE | SAN FRANCISCO | NEW YORK | LONDON

As of 3Q 2018
Yale University Access

- All Active students and faculty

- Downloads Limitations:
  - Daily Profile Views: 100
  - Daily Downloads: 10
  - Monthly Downloads: 25
  - People Daily Downloads: 10
  - People Monthly Downloads: 25

- Login via University library portal

- All data and content available in PitchBook except Morningstar equity research.
Getting Logged in

- Student access to PitchBook data will be done through the Yale student portal primarily.
  - You can also visit yale.pitchbook.com and click “Create an Account” to register using your Yale email address.
- Your access will be limited to be within Yale’s permitted IP addresses.
- If you have previously had access to PitchBook through another source, you will need to re-register.
- License will reset on May 31st per the end of the term. Students will need to recreate their accounts after the subscription renewal.
PitchBook Support

For training, questions, troubleshooting, and report-refining, our customer success team is at the ready.

Support Team
Looking for help with a custom search, a plugin, or have questions about a chart in a recently published analyst report? support@pitchbook.com

Phone: +1 (206) 257-7775 | +44 (0) 203-875-3504

LiveChat
Need answers ASAP? Use our live chat feature in the lower right-hand corner of PitchBook Desktop to connect directly. A member of our support team will be there to help.

Hours: 4 AM - 9 PM EST

Your Customer Success Manager
We provide one-on-one training whenever you need it—whether you are new to PitchBook or just need a refresher. Contact your CSM to help optimize your day in the Platform, or to answer any questions you have.

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Help Center
Discover our new online help center—a dynamic self-service hub that gives you instant access to the resources and tutorials you need to get the most out of PitchBook.

https://my.pitchbook.com/help
General PitchBook Functionality
PitchBook Dashboard

The dashboard contains a number of useful widgets you can set to your region, industries or companies you’re following. Customize to your needs as frequently as you desire.
Advanced Searching

Determine your parameters within search setup to narrow down entities most important to you

Explore
Select another type of search from the left-hand sidebar
- Portfolio Companies
- Deal History
- Investors & Buyers
- Service Providers
- People
- ...and more
Organize search results your way

1. Access multiple search types from upper tab
2. Add columns, download list to Excel Analyze trends and visualize your lists with pivot tables and charts
3. Order and filter column contents
4. Save and name list layouts
5. Save or share searches with colleagues, set up email alerts when changes occur in your lists
Click into a company profile

Take a deep dive into a company’s general info, executive team, locations, and financing history

General Information will give you a high-level summary of operations, products, services and context of most recent financing. Take a look at primary industries, employee counts, and company status gathered by Pitchbook’s research team.

Contact Information links to the primary contact of the company and lists office locations.

Signals is a way to evaluate the traction and growth of private companies using non-financial data. The underlying signals/indicators include: Facebook Likes, Twitter followers, SimilarWeb Unique Visitors, Majestic Referring Domains, and Mobile App Reviews.

Deal History shows the equity financing history of the company with investor and service providers involved with each transaction. Lead partners are tracked where available, which helps when building your prospect pipeline.
Set up Saved Searches, Lists and Alerts

Your saved searches aren’t static; use alerts to stay in tune with changes by activating alerts as financing statuses change or your lists increase in size. Receive emails when deals close or news occurs around certain people, investors, or companies.
Enhanced Tools and Resources
Research Center

Redesigned reports library with sections for private and public market research and adding thematic reports from Morningstar.

Benefits:

- **Save time** — Advanced preview functionality and sophisticated filtering.
- **Consolidate resources** — In-depth private market and equity research all in one place.
Suggested Companies

Leverage machine learning to help users easily discover relevant companies and fine-tune their search results without having to go back and modify their search criteria.

Benefits:

- **See relevant companies** – See relevant companies you may have inadvertently filtered out with search criteria
- **Discover new companies** – Efficiently discover interesting new companies when exploring a nascent or niche industry
- **Save time** – No longer spend time going back and forth modifying search criteria to get specific companies to show in a search
Industry Overview

Better understand emerging industries

Quickly understand the trends and top players in any market, from nascent to established, with all the information you need on one page—and the ability to dive into the details.

Get meaningful insights with less effort

Understanding how an industry is evolving and where it’s headed requires constant, time-consuming analysis. Now you can work more efficiently with instant market analysis built on PitchBook’s best-in-class private market data.

Discover new opportunities

Get actionable insights and identify new opportunities with logic revealing which companies are most likely fundraising, recently founded and most heavily capitalized.
PitchBook Chrome Extension

Access PitchBook’s comprehensive data directly from your browser while you’re visiting a company’s website, reading the news or doing online research. With public and private market insight always just a click away, it’s easy to find, vet and pursue promising opportunities—without leaving your current workspace or moving between tabs.

Save time | Streamline your workflow | Easily conduct due diligence | Connect with dealmakers

Save time
Optimize your workflow. Highlight and right-click on an entity, instantly scan a news article or search within the extension to view hard-to-find information (like a company’s valuation or an executive’s contact info) as you browse.
Intraday market data

15-minute stock prices, customizable charts and new equity data points for improved equity analysis.

Benefits:

• **Timely market data** — Quickly analyze a stock’s performance over time, easily compare equities and gain a more holistic view of the public and private markets.
Global source docs

Users can view non-SEC regulatory filings for public companies in a standardized format.

Benefits:

- **Outside-U.S. document access** – View and analyze regulatory documents for companies outside the US
- **Fiscal half and year options** – View standardized documents for all EU, UK and AUS companies that file on a semiannual basis
- **Tripled document coverage** – Access over 6 million available source documents
- **Comprehensive coverage** – Get complete global coverage of any document filed by a public company on a national stock exchange
As of 3Q 2018

Calculations transparency and click-through to source filings

Users can conduct due diligence on public company financial data by analyzing both calculated and reported financial data points in one streamlined workflow from the financial page view.

Benefits:

• **Calculation drilldown** – Drill into a specific calculation trail to view sub-level data points

• **Source document tagging** – View the exact location of reported data points within the source filing
Thank you for being our valued client.

We know the upcoming year has great things in store—and we can’t wait to help you unlock its potential.

Questions? Please don’t hesitate to reach out. I’m more than happy to help.

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