



STEPHEN D. CUTLER
CENTER FOR INVESTMENTS
AND FINANCE

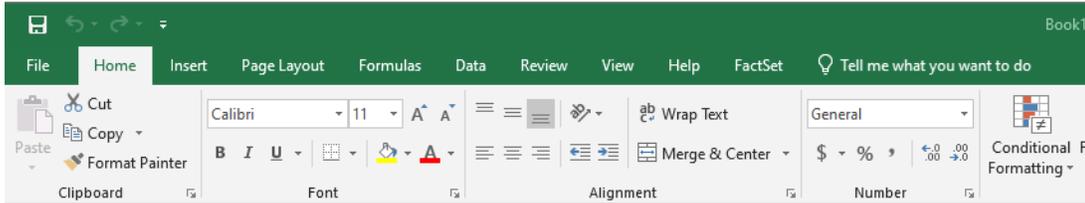
Bloomberg

Downloading data using the excel plug-in

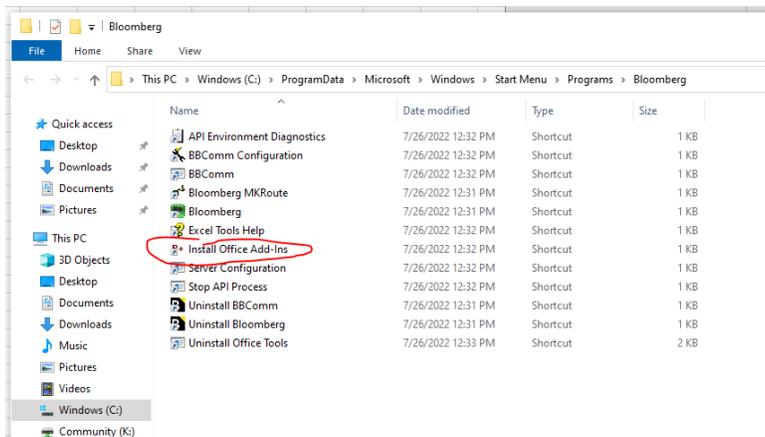
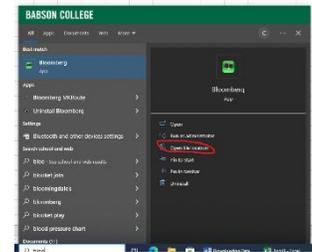
Created by: Angan Sarker '21

Downloading data from Bloomberg using the excel plug-in

- 1) The first step is to assure that the Bloomberg Add-in is loaded into your Excel. To check it is added, open Excel. In the top toolbar, you should see “Bloomberg” to the left of the FactSet tab. However, if your toolbar does not include “Bloomberg” (as shown below), follow the below steps:

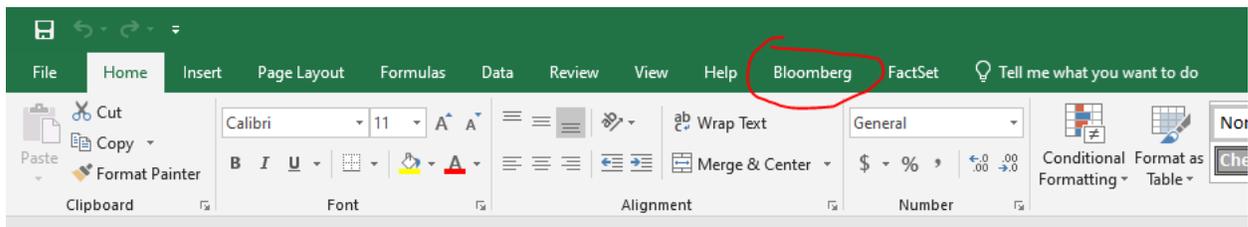


- a. Place your cursor in the “type to search” field in the bottom left of your computer screen, and type “Bloomberg.” Do not open the application.
- b. Click “Open File Location,” as seen on the right
- c. Click “install office add-ins.”



- d. Click “Install.”
- e. Ignore the error message if it pops up by clicking “okay.”
- f. Click “close.”
- g. Close the file location.

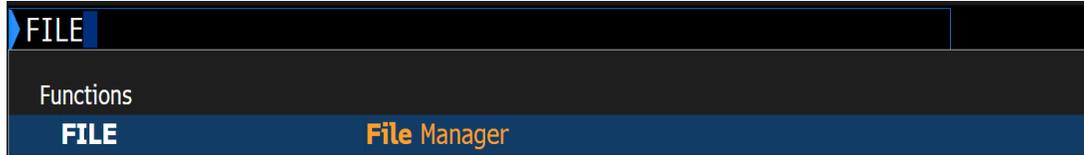
- 2) Now, open Excel and ensure that you have a Bloomberg tab on the top menu.



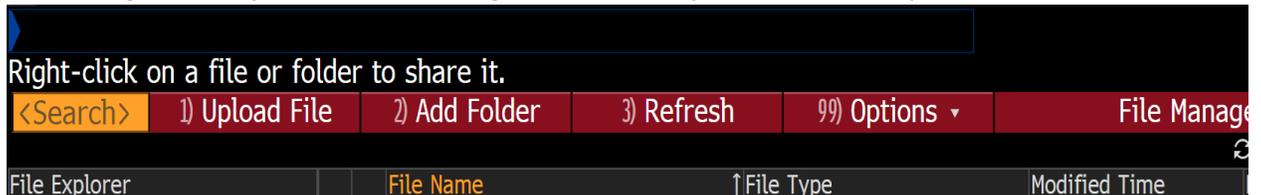
- 3) Create an empty excel file and save the file in a location of your choice.

4) Log in to Bloomberg/Bloomberg anywhere.

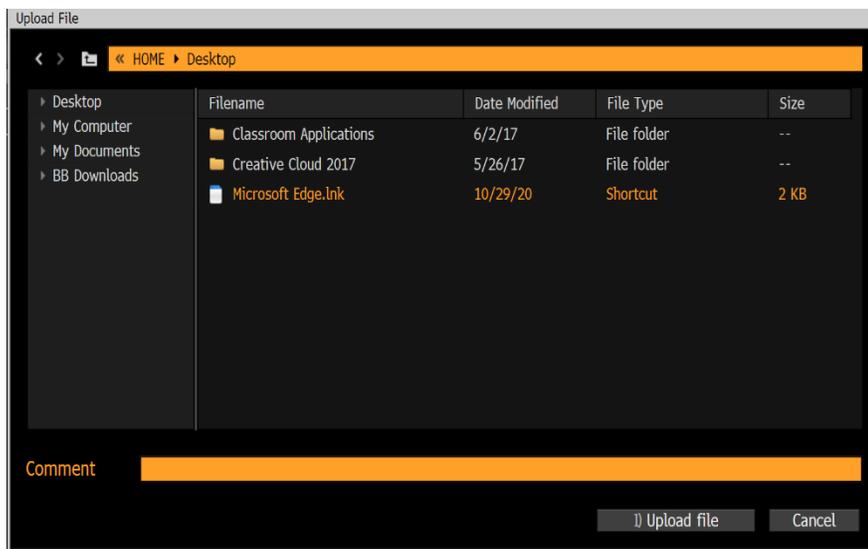
5) Type the function FILE and click <Enter>



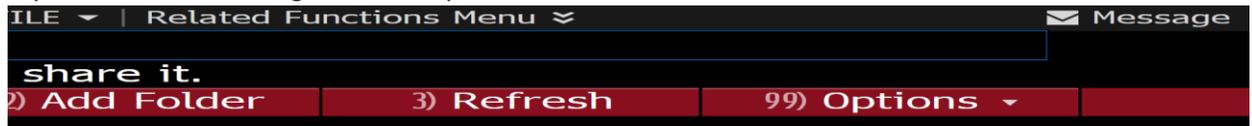
6) Bloomberg will take you to the file manager screen. Here you have to click upload file.



7) You will see the window below. Click on my computer and navigate to the location of the excel sheet that you created in the beginning

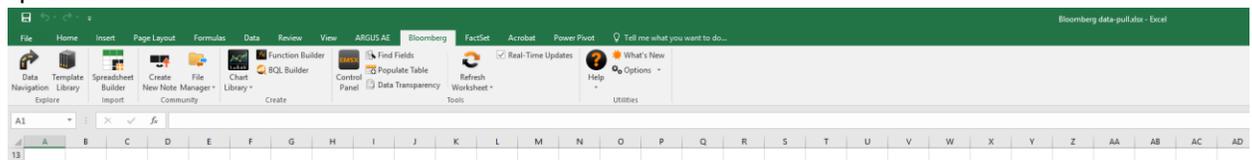


- 8) Now you will receive a mail with your uploaded document. Click on the messages button at the top to access the message with the uploaded file

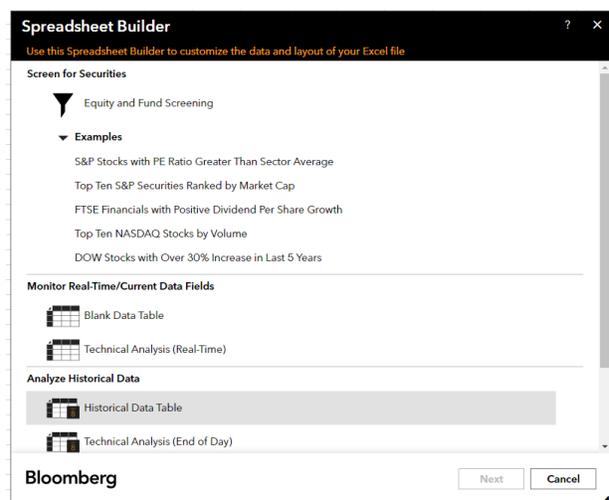


- 9) You will see a file alert in your inbox. Open the alert and click on the attached file, this will take you to the file manager window. Click on the file that got uploaded in the file manager window. A excel sheet will open with the Bloomberg plugin enabled.

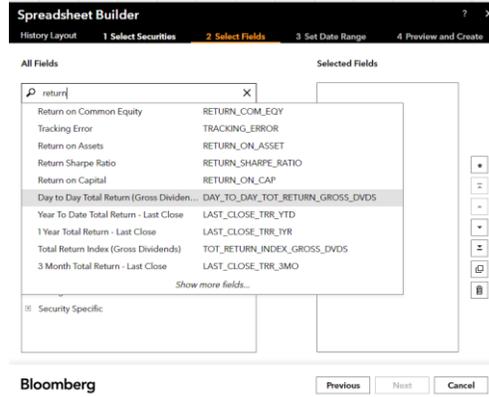
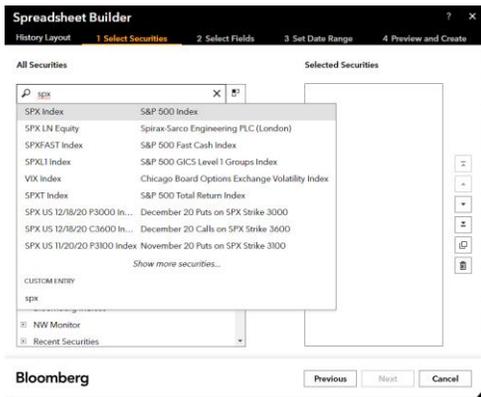
- 10) Now in order to pull data from Bloomberg you have to go to the Bloomberg tab and click on the spreadsheet builder.



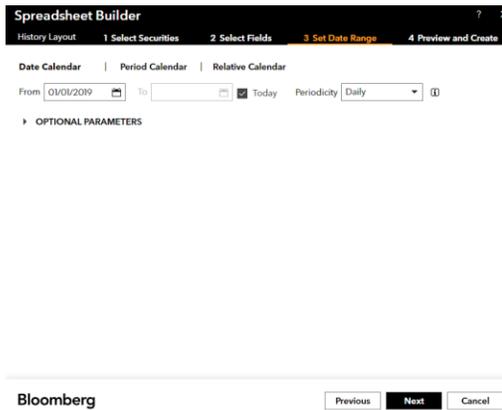
- 11) In the spreadsheet builder you have to choose the historical data table option



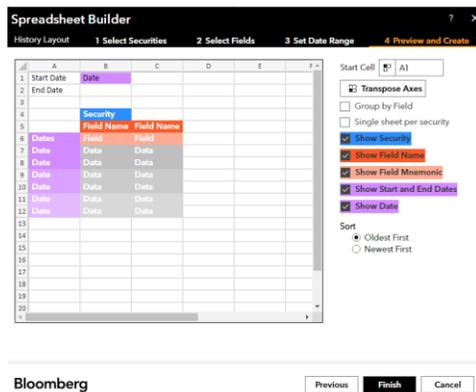
- 12) Now in the search box type in the security or the index of your choice and click next. In the next search box type the field/fields that you need, for example: last price, day to day total return.



13) In the next page you can enter the date range



14) In this page you can preview the result's format, click finish to pull the data into the excel sheet.



	A	B	C	D	E	F	G
	Start Date	1/1/2019					
	End Date						
		SPX Index					
		Last Price	Day to Day Total Return (Gross Dividends)				
	Dates	PX_LAST	DAY_TO_DAY_TOT_RETURN_GROSS_DVDS				
		1/2/2019	2510.03	0.1271			
		1/3/2019	2447.89	-2.45			
		1/4/2019	2531.94	3.4336			
		1/7/2019	2549.69	0.7014			
		1/8/2019	2574.41	0.9717			
		1/9/2019	2584.96	0.4416			
		1/10/2019	2596.64	0.452			
		1/11/2019	2596.26	-0.0144			
		1/14/2019	2582.61	-0.5146			
		1/15/2019	2610.3	1.0744			
		1/16/2019	2616.1	0.2248			
		1/17/2019	2635.96	0.769			
		1/18/2019	2670.71	1.321			

15) Save the file. If you want to use the Bloomberg plugin again you have to upload the file again using the file manager and open it through Bloomberg otherwise you will fail to access the Bloomberg plugin functionality.