

## PitchBook – Searching for competitors – Video Transcript

Hi everyone, this is a quick video to introduce you to PitchBook and how this database can be used to search for competitors. My name is Sally Armstrong and I am the Entrepreneurship Librarian.

PitchBook is a private equity and venture capital database which covers a wide range of companies which includes quite a few startups. While this database is really well known for having private equity information, and financing deal information, I find it's also really powerful for searching for competitors.

The database has just over 3 million companies, nearly 90 thousand of those are public companies, but the rest are private. This screenshot here is just an example of a company profile that you can find in PitchBook. This is specifically for Zoom, which I thought was a relevant company in today's times.

For PitchBook you will need to create an account to access it. You will need to use your UNB email address and this will give you the ability to log in to PitchBook and you're able to download company and investor profiles, charts and graphs. This here is an example of a chart that you can download from PitchBook. It's comparing TikTok to some of its other competitors that are in the database. Data in PitchBook cannot be downloaded to Excel, so I just wanted to make that clear. You can download limited amounts of data to Excel, but you will need to contact me and I will need to download that information for you. And the account that you create with your UNB email address will be reset each year on August 31st, just to ensure that PitchBook is only being used by current UNB students, staff and faculty.

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So where does pitchbook get their data? They use more than 220,000 web crawlers to capture this information, and they use natural language processing and machine learning to distill this large amount of information into the data that you see within PitchBook. A very specialized data team verifies the information that they are pulling using web crawlers and machine learning and then they have a primary research team that communicates directly with the companies to validate the data that they are collecting. This is a process that is repeated every day on the entire data set to ensure that it is up to date and accurate.

When you're creating a PitchBook account, you want to make sure you're doing it while on campus or while connected to the UNB proxy. When you see this login screen for PitchBook and

it's your first time accessing it you will want to click create an account and this page will show up to create your PitchBook account where you'll fill out your first and last name and your UNB email address. You will likely have your confirmation email sent into junk mail so make sure that you check there for the confirmation email to activate your account and then you should be able to create a password and login.

Now I'm going to take us into the actual database and we can take a look at what it looks like. Okay, so if you're on the library homepage which is lib.unb.ca you want to scroll down to article databases and were going to browse for database by title and you can type in PitchBook. So we will click Go, select PitchBook. This is terms of use information that I spoke about previously and my presentation. So we will just click connect to PitchBook. I connected automatically because my login is saved but you will see that page to create an account the first time you login.

This is what the homepage of PitchBook looks like. So if you're coming in here and you're searching for a specific company, you have the name of the company in mind, you can just go up here to the search box and type in the name of the company. Let's use Zoom as an example. Typing in Zoom you can see this Zoomability is coming up as the first results and that's because its stock market ticker is zoom but the Zoom and I'm actually looking for is Zoom Video Communications. You can see there are quite a few companies that use Zoom as their company name so you just want to make sure that you're looking at the one you want.

And we can see here that PitchBook is telling us that this is a public company but you're also able to go to their acquirer profile. This will show you information on companies that Zoom has acquired. This is what a company profile looks like. On the left-hand side here you can see the table of contents for there are quite a few different areas that make up a company profile. I'm not going to go through all of them right now because that would take quite a while but as you can see there is a lot of information in here for you to go through.

They have this really great highlight and overview at the very top of the page. For an example of a chart you can download. You can see this little download button here. You can click this and you can download this as an image. If you are interested in getting a download of the entire report there is a little download button up here at the top you can click and you can download it into a PDF. You're able to select the sections that you do or do not want to see in your download.

Just going to exit that. Yes, this is generally what the company profile looks like in PitchBook. But maybe you are searching for companies that are within a specific industry or vertical and so you want to kind of get a wider range of results. So on the left-hand side here you can go to companies and deals and click. And this will take you to the company and deals search so we are going to be searching for companies. I recommend staying on the key fields section, at least for your first few searches because as you can see there are quite a few different areas that you can select criteria for the search that you're doing. If you feel comfortable to dive into these

additional areas go ahead, but for this example I'm just going to be showing your criteria that you can select on the key fields section.

As you can see we're looking at a database that has just over 3 million companies in it but as you add criteria to your search that number will drop. I'm going to select a location we're going to search for companies in Canada and as you can see that significantly dropped our results. That tells you that quite a few of the results in this database are not Canadian. PitchBook is an American company so overwhelmingly they do focus on American companies in the database. I'm going to search for companies that are only headquartered in Canada. I'm not interested in companies that have a subsidiary office in Canada, I'm only looking for companies that are headquartered in Canada.

Maybe I'm looking for a company that is a bit more recent so maybe it's founded since 2015 so companies that are five years or younger. And then really the next criteria that I suggest that you use to conduct a company search is this industry, verticals and keyword section. If you click in this box it defaults to you being able to type in a keyword. I strongly recommend that you do not do that. What I suggest you do is use the industries and verticals that are within PitchBook to define your search. You will get far more accurate results using the terminology that they have outlined here rather than putting in your own keywords. I find that the results you get back are much more accurate and much more useful for your purposes.

So if we're going to do an example search, I'm going to click into financial services and as you can see you can break down the industry into quite a few different segments. So I am going to do is just click financial services over all but then on the right-hand side here you've got all these verticals. The industries, I find, are your more traditional establish industries where as the verticals are more technology-based. Maybe they are some newer areas of technology that PitchBook adds in overtime, depending on kind of what is emerging on the tech side of things. As you can see quite a few different verticals that you can explore in here so you can get some really interesting results when it comes to tech companies based on the criteria that you use. So I'm going to do a search for a company that's in the financial services industry, but I also want it to include companies that are in the cryptocurrency and blockchain vertical. So right now it is searching for companies that are in financial services or cryptocurrency but I want to get results for companies that are in financial services and cryptocurrency and blockchain. So as you can see that dramatically dropped our results from just over 1500 to 39. That gives us a much more manageable list of companies to work with.

I'm going to click search and it will take us to our results page and this is the list of the 39 companies that fall into our criteria. As you can see, they're all located in Canada so you can filter based on where they are located. You've also got some information on their last financing size. Really these columns depend on what kind of information you're interested in finding out about these companies. You can edit these columns, maybe there's some other information that you want to be able to filter on. You can add and remove columns as you see fit. But, if there's a company that you're interested in, for example Newton Crypto, you can click on Newton Crypto and it will take you to the company profile. Very similar to what we saw for

Zoom. So it's the same idea, you've got the table of contents on the left-hand side. You've got this general kind of high-level overview and then you can scroll down and you've got some information here on similar companies. As you can see these are companies that fall outside of Canada so maybe this is the way to learn about some international competitors. So, as you can see there's quite a lot of information in here. They talk about any deals of the company has gone through and they break down all the details on the deal.

This is just an example of a search that you can conduct in here to find competitors. I find that PitchBook has information on private companies that some of the other business databases don't have.

If you have any questions about PitchBook, feel free to reach out to me. Again, I'm Sally Armstrong, I'm the Entrepreneurship Librarian. You can send me an email at [sally.armstrong@unb.ca](mailto:sally.armstrong@unb.ca). You can also reach out to Leanne Wells, the Business Librarian and she will be more than willing to help you as well. I hope this was helpful and hope you have a great day.