The most trusted business intelligence at your fingertips.
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info@bvresources.com
1-503-479-8200
About Business Valuation Resources

Any informed stakeholder in business valuation, performance benchmarking, or risk management turns to Business Valuation Resources (BVR) for authoritative market data, training, and expert opinion. Trust BVR for unimpeachable business valuation intelligence. BVR's databases, publications, and analyses have won in the courtroom and the boardroom for more than 20 years.

Who uses our products?

- Business appraisers
- Certified public accountants
- M&A professionals
- Business intermediaries
- Attorneys and judges
- Private equity professionals and venture capitalists
- Business owners
- CFOs
BVR's deal and market data platforms are used by a wide variety of financial professionals, including business appraisers, business brokers, M&A advisors, investment bankers, and professionals who work in venture capital.

Pricing valid through March 31, 2024
Welcome to the new generation of private and public company transaction comparables for valuation and M&A professionals. DealStats is a powerful platform that boasts the most complete transaction details on over 46,500 acquired private and public companies. BVR’s dedicated team of financial analysts rigorously review every transaction in DealStats. Whether you are valuing a business, deriving a sale price, benchmarking performance, or conducting fairness opinion research, you won’t find more complete and trustworthy data.

Defend your business value conclusions with real-world deals

- Get detailed statistics and comprehensive reports with financial ratios, valuation multiples, financial statements, and more
- Use the robust search functionality to explore up to 202 data points and get deal alerts when new transactions are added

See current and historical financial data

- View the most recent year and up to four years of historical net sales, EBITDA and SDE values, as well as forecasted net sales and EBITDA
- Get the quarterly DealStats Value Index, an analysis of private-company acquisitions from DealStats

Price: $1,239 per year  .  $435 per day pass
BIZCOMPS

BIZCOMPS is a comprehensive platform with the most thorough and accurate financial details on “Main Street” private companies. This must-have tool includes more than 16,135 deals dating back to 2009 and removes marketplace uncertainty with access to meaningful financial information. Subscribers also receive the BIZCOMPS/BVR Deal Review, a bi-annual publication that summarizes BIZCOMPS data.

Bolster your valuation research and conclusion

- Easily find comparables to your subject company and track current and historical valuation multiple trends with detailed charts and graphs
- Support your valuation conclusion with empirical evidence from 21 data fields per transactions, including 2 valuation multiples

Get the small company comparables you need

- Use the quick search function to search using the most popular fields or customize your outputs to include or exclude the criteria you choose with search tabs
- Access the BIZCOMPS/BVR Deal Review, a bi-annual publication that summarizes and analyzes general trends for transactions in the platform

Price: $729 per year . $265 per day pass
Cost of Capital Professional

Based on the principles of simplicity, transparency, and credibility, the Cost of Capital Professional platform provides the most current cost of capital data available in an easy-to-use format. Quickly get risk-free rates, equity risk premia, size premia, and industry-risk premia based on your subject company's valuation date and size.

Quickly get risk-free rates, equity risk premia, and more

- Spend less time explaining your methodology with a straightforward and supportable cost of equity figure
- The platform relies on the Center for Research in Security Prices (CRSP) market return data set, the most widely used basis for 10-decile returns

Have everything you need to support your work

- You will always see the components of your cost of capital, how the figures were calculated, and the citations of all sources used
- Subscribers receive access to Industry Betas, a quarterly report that provides levered and unlevered industry betas by industry, subindustry, and geographical region

Price: $395 per year ($150 for each additional user)
FactSet/BVR Control Premium Study

Rely on more than 20 years of detailed transaction data with the web-based FactSet/BVR Control Premium Study. This robust tool provides empirical support for quantifying control premiums, implied minority discounts, and public-company valuation multiples. Easily search over 15,000 transactions that detail up to 62 data points including the control premium, the implied minority discount, and up to five valuation multiples for each transaction. Subscribers also have access to the quarterly Control Premium Study report PDFs.

Easily calculate control premiums and implied minority discounts

- Now includes invested capital premiums and discounts, plus equity discounts and premiums
- Effortlessly search by SIC or NAICS codes, industry, financial performance ratios, sale details, and other criteria and export the data directly into Microsoft Excel

Get detailed reports

- Reports include in-depth transaction details, premiums, discounts, sale details, target financial data, and target pricing multiples
- Subscription includes the quarterly Control Premium Study report PDFs as well as access to historical issues

Price: $879 per year . $525 for day pass
FactSet Review

The FactSet Review is the de facto source for M&A data and analysis. It delivers data on transactions in which the buyer or seller was a U.S.-based company and covers privately held, publicly traded, and cross-border transactions. It provides extensive M&A analysis and coverage, industry multiples, premiums paid by industry and time period, and more.

Arm yourself with M&A statistics and trends

- Captures 20 years of historical M&A data and provides detailed industry analysis
- View prices, methods of payment, premiums, and other critical information related to the overall M&A market

Consult real-world industry data and statistics

- Explore the most active industries and their respective premiums, TIC/EBITDA, TIC/EBIT, and P/E averages
- Perform M&A analysis based on industry spotlights, multiples, premiums, and cross-border activity

Flashwire US Monthly (a PDF report included with purchase) delivers the most valuable M&A statistics and analysis, including the latest activity and deal data by industry—ideal for adding insight and impact to valuation reports, pitch books, client presentations, and competitive reports.

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<th>Year</th>
<th>Number</th>
<th>Year to Year Percentage Change</th>
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<td>2002</td>
<td>8,823</td>
<td>-10%</td>
</tr>
<tr>
<td>2003</td>
<td>9,290</td>
<td>+5%</td>
</tr>
<tr>
<td>2004</td>
<td>10,984</td>
<td>+18%</td>
</tr>
<tr>
<td>2005</td>
<td>11,776</td>
<td>+7%</td>
</tr>
<tr>
<td>2006</td>
<td>12,235</td>
<td>+4%</td>
</tr>
<tr>
<td>2007</td>
<td>11,369</td>
<td>-7%</td>
</tr>
<tr>
<td>2008</td>
<td>8,520</td>
<td>-25%</td>
</tr>
<tr>
<td>2009</td>
<td>7,235</td>
<td>-15%</td>
</tr>
<tr>
<td>2010</td>
<td>9,481</td>
<td>+31%</td>
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Stout Restricted Stock Study

The Stout Restricted Stock Study platform, updated quarterly, has rigorously screened restricted stock transactions with up to 60 data fields per transaction. The thoroughly vetted data provide empirical support to quantify discounts for lack of marketability (DLOMs).

• Updated quarterly and rigorously screened, each restricted stock transaction includes up to 60 data fields with verifiable details
• This powerful tool automatically calculates summary statistics for a number of fields to aid in the analysis of the data

Rely on firsthand, current empirical data

Present your DLOM conclusions with confidence

• Utilize the Stout DLOM Calculator to determine a subject-company specific DLOM
• Use the detailed reports to make comparisons between subject companies and issuers of restricted stock and automate quintile sorting, comparisons, and calculations
Valuation Advisors Lack of Marketability Discount Study

Defend your discounts for lack of marketability with the most current data in the Valuation Advisors Lack of Marketability Discount Study. This robust platform includes over 18,800 pre-IPO transactions from 1985 to the present.

Trusted by the “Big Four,” this must-have tool enables you to reference actual DLOMs for companies with similar characteristics to your subject company and ensures you have the most convincing data available.

Trusted by the “Big Four”

- Guarantee you have the most current pre-IPO data with monthly updates from the platform used by the “Big Four” accounting firms and the IRS
- Quickly and easily search more than 18,800 transactions by industry, business description, and revenues

Access quarterly lack of marketability discount data

- View a summary chart of median DLOMs by year for each pre-IPO time frame
- Take advantage of advanced search results that include statistics on count, range, mean, and median

Price: $745 per year
Guideline Public Company Comps Tool

Put the Guideline Public Company Comps Tool to work for you. Access complete financial statements, financial ratios, and multiples for comparable companies and easily save your comps or export your results to Excel.

An exclusive feature provides suggested companies that come from those that were used in sets of guideline comparable companies in fairness opinions, filed by the leading valuation firms and investment banks, that were accepted by the SEC.

Search, export, and compare with confidence

- Pull complete financial statements, financial ratios, and multiples for comparable guideline public companies on U.S. exchanges for any selected time period
- Harness the power of the Excel add-in and pull all company data directly into your Excel models

Easily review additional comparables

- The platform provides suggested companies that come from those that were used in sets of guideline comparable companies in fairness opinions, filed by the leading valuation firms and investment banks, that were accepted by the SEC

Li Auto Inc., through its subsidiaries, designs, develops, manufactures, and sells new energy vehicles in the People's Republic of China. The company provides Li ONE, a six-seat smart electric sport utility vehicle that is equipped with smart vehicle solutions, navigation on ADAS, and automatic emergency breaking functionalities. It also offers sales and after sales management, and technology development and corporate.

Price: $1,595 per year (up to 5 users) . $1,025 per year (single license)
Valuation Benchmarking Platform

The Valuation Benchmarking Platform (VBP) is a groundbreaking tool that harnesses insight into comparable business valuations like never before. For the first time, you’re able to screen acquisition assumptions made by the leading valuation and investment banking firms. VBP’s allows you to search for valuations of companies that match your subject company using dozens of customizable criteria. This robust platform is an ideal add-on to any financial data platform—like DealStats or CapIQ to see what conclusions other top analysts reached.

Get insight into how analysts choose data

- See valuation inputs and data employed in similar valuations and access source documents including valuation reports, valuation opinions, and board books
- See how and when analysts chose various income, market, and asset approaches

Explore the best-in-class valuation assumptions

- Compare multiples, cost of capital, normalized financial forecasts, and other business valuation assumptions with recent work accepted by the SEC and other regulatory and reporting entities

Price: $1,095 per year . $695 per day pass
Butler Pinkerton Calculator

The Butler Pinkerton Calculator offers empirical data for total cost of equity (TCOE) and company-specific risk premiums (CSRP), a first for the business valuation profession. This cutting-edge, web-based tool produces real-time beta calculations based on your choice of five different market proxies and allows you to use the empirically derived results to support and defend your subject company’s cost of equity.

Objectively quantify total risk using empirical market observations

- Get calculations from other sources or methods and compute company-specific risk. The BPC performs in minutes the work that would otherwise take hours

- Get market-based support for U.S. companies - the model quantifies TCOEs and CSRP for up to 12 publicly traded stocks at any one time

“*They may have created a tool for valuation professionals that is ... possibly better than anything else out there for the determination of a discount rate. The Butler Pinkerton Calculator is a tool that every valuation analyst must have in his or her toolbox.*”

– Gary Trugman, CPA/ABV, MCBA, ASA

Price: $389 per year
Vertical IQ

Designed to help valuation practitioners, Vertical IQ profiles dive into the details of risks, trends, cash flow, operations, and financial challenges inherent to niche businesses of all types. Save time and attract more clients by getting a clearer picture of a business’s main challenges with financial benchmark data and a “sort and target” feature that quickly compares metrics across industries. Take your valuation to the next level by including Vertical IQ’s high-impact industry data in your valuation report.

Save time with hard-to-find business intelligence

- Access more than 570 industry profiles, with access to historical archives, to get a closer look into a company’s challenges, industry risks, industry trends, and more
- Vertical IQ tracks local economic data, business growth, startup activity, and industry statistics for more than 400 metro areas and 3,400 countries

Quickly find industry benchmarking data

- Vertical IQ has US sector profiles enabling a more in-depth analysis of major parts of the US economy
- Clearly understand the ins and outs of profit drivers, how firms operate, and how the company you are valuing fits into the larger picture

Price: $1,200 per year U.S. profiles (Canadian profiles and single reports available.)
Bizminer

Bizminer has delivered quality online analytical content for 15 years. Savvy valuation professionals regularly access Bizminer’s robust database of financial statements, valuation tools, and market environment analytics for over 9,000 lines of business specific to local and national markets.

**Get the most current data from more sources than other similar reports**

- Bizminer has the most cost-effective industry and geographic data on 9,000 industries in thousands of U.S. market areas.
- Bizminer uses more sources than any other similar report, including the IRS, U.S. Economic Census, Bureau of Labor, and more.

**Industry Financials**

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<th>Percentages</th>
<th>Trend</th>
<th>2017</th>
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<tr>
<td>Business Revenue</td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Cost of Sales</td>
<td></td>
<td>37.06%</td>
</tr>
<tr>
<td>Cost of Sales - Labor Portion</td>
<td></td>
<td>5.54%</td>
</tr>
<tr>
<td>Gross Margin</td>
<td></td>
<td>62.94%</td>
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<td>Officers Comp.</td>
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<td>4.27%</td>
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<tr>
<td>Salary-Wages</td>
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<td>21.50%</td>
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**Access every report with Bizminer Pro**

- US/Local Industry Financial reports
- Sole Proprietorship Financial reports
- Industry Market Trend Series
- Competitive Market Narrative reports
- 3-Ring Demographic Series
- Sales per Square Foot
- Valuation Multiples
- Vestimate Pro report
- Vestimate Market Search & Name Search
- SWOT XPRESS
- Company insights

Price: Bizminer Pro: $1,699 per year  .  Bizminer Premium: $1,279 per year  .  Bizminer Starter: $799 per year  .  Industry single reports also available
First Research Industry Profiles, State Profiles, and Canadian Province Profiles provide detailed industry and economics analysis in thousands of segments. In a matter of minutes, get key insights into your industry or geographic area. Each industry profile includes important sections on critical issues, a quarterly industry update, industry overview, financial ratios, business trends, and industry forecasts. Each state or province profile includes sections on the big picture, employment data, local real estate summary, and website resources.

**Readily spot key business challenges**

- Grasp how an industry operates, understand the competitive environment, and stay current with government regulations
- Save valuable time and research dollars with access to reports in thousands of industry segments, 50 state profiles plus Washington, D.C., and 10 Canadian provinces

**Easily stay current with industry changes**

- Search by SIC code, NAICS code, or industry name
- U.S. industry profiles are updated quarterly, state and Canadian province profiles are updated monthly, and Canadian industry profiles are updated annually. Plus, historical reports are available with a subscription

Price: $1,099 per year U.S. Industry Profiles . $469 per year Canadian Industry and Province Profiles $139 per single U.S. Industry Profile . $99 per single U.S. State or Canada Province Profile $69 per single Canadian Industry Profile
Economic Outlook Update

Save time with the most comprehensive economic data available. The Economic Outlook Update (EOU) monthly and quarterly reports digest expansive research from leading sources into one convenient report.

In-depth economic data in one convenient report

- Save money on expensive research with one report that includes data on GDP, unemployment, consumer spending, stocks and bonds, real estate market, and more
- Get links to economic information sites for local reviews and forecasts with a handy state-by-state summary

Access current and historical reports

- Easily use the data directly in your reports - delivered in PDF, Microsoft Word, and Excel formats
- Get monthly updates, four quarterly reports, and historical reports back to 1Q2003
- Get economic forecasts derived from 30 prominent U.S. economic and financial forecasters

Price: $410 per year . $185 per single issue
ktMINE

ktMINE provides hands-on access to the most comprehensive royalty rate data available. This interactive database provides direct access to royalty rates, full-text license agreements, detailed agreement summaries, and statistical analysis.

Find true market comparables with ktMINE

- Access thousands of public agreements and license agreements, service contracts, referral agreements, and more!
- ktMINE analysts review every agreement in the database using a rigorous process to ensure all key licensing terms are accurately captured and categorized

Get in-depth summaries and analysis tool

- ktMINE’s summaries list an agreement’s key licensing terms and provide access to the full agreement details
- The database’s “analysis center” provides charts and tables that quickly reveal big-picture context and trends for an entire set of agreements

Day passes and annual subscriptions available. Please call 1-503-479-8200 for details.
RCReports

Practitioners have welcomed the launch of RCReports, the platform created especially for business appraisers. RCReports delivers a streamlined solution built on 12.9 million wage data points and a proprietary system. Heralded by CPAs, business appraisers, attorneys, and forensic accountants as a must-have resource, RCReports generates lightning-fast reasonable compensation reports that are objective, accurate, and backed by methodology that combines IRS criteria, court rulings, and geographic data.

Reasonable compensation calculations in a matter of minutes

- Quickly and easily run a reasonable compensation analysis in a fraction of the time with the RCReports online tool
- Each report contain an independent, unbiased reasonable compensation figure that you can rely on for IRS examinations and litigation engagements

Choose the approach that fits your engagement

- Every report includes supporting resources, including case law, IRS rulings, white papers, and more
- Choose one approach or run multiple approaches and reconcile them to develop accurate wage data supported by an independent source and forecasts

Price: $1,080 per year (basic) . $1,500 per year (premium)
The Business Reference Guide (BRG) is the essential guide to benchmark and price businesses and franchises. With rules of thumb and pricing information for nearly 700 types of businesses, the BRG is a vital tool for any stakeholder in a privately owned business.

**Get pricing information at your fingertips**

- Rules of thumb based on sales, seller’s discretionary earnings, and more
- Pricing tips from industry experts
- Benchmark information that provides comparison data
- Industry resources such as associations and publications with websites
- General information providing industry data, surveys, and comments

With the BRG Online Database, users enjoy the BRG data they’ve come to depend on with additional benefits such as keyword searching, continual updates throughout the year, and more! Plus a subscription includes the current year’s print edition of the guide.

Quickly and easily search the most current data

- Search the BRG Online using keyword or SIC and NAICS codes
- Always have the most current data with continual updates throughout the year

**Price:** $408 per year (includes print copy of current-year Business Reference Guide)
BVR offers a wealth of tools to assist with your valuation research, including searchable platforms, reports, and publications that cover the content you need to stay current.

Pricing valid through March 31, 2024
The *Business Valuation Update (BVU)* has been the voice of the valuation profession since its inception in 1995. Each monthly issue includes new thinking from leading professionals around the globe, detailed reports from recent valuation conferences, analysis of new business valuation approaches, and analysis of featured legal cases that cover key business valuation issues, regulatory and standards updates, and more!

**Keep yourself front and center of the profession**

- Access all current and historical articles published in the *BVU* including featured columns such as U.S. and Global BV News and Trends, BV Tip of the Month, Cost of Capital highlights, and more.
- Bulletproof your valuation conclusion with the latest research and findings to include in your report or expert witness testimony.

**Save time with our state-of-the-art search functionality**

- Easily search by keyword or author to find the content most relevant to you.
- Get a special summary of BVR’s monthly *Economic Outlook Update* created specifically for *BVU* subscribers.

Price: $475 per year  (includes online access, PDF download, and print version)
BVLaw

When your reputation is on the line, use BVLaw to learn the court’s perspective on the critical elements of your business valuation. This comprehensive online tool includes over 3,900 business valuation cases and case digests that feature decisions that involve economic damages, lost profits, divorce, shareholder oppression, partnership dissolution, and more.

BVLaw has been locating, indexing, and analyzing business valuation-specific cases for over 15 years, and BVR’s team of legal experts continuously track and analyze published decisions from the courts in all 50 states and federal jurisdictions (including the Delaware Court of Chancery and the U.S. Tax Court) to ensure that you’re current on decisions.

Save time and minimize your legal research fees

- BVLaw includes legal analysis and full-text court opinions that date back to 1925
- Our legal analysts prepare focused digests so you can quickly perform unlimited searches and drill down to the valuation and damages issues

Utilize a state-of-the-art search engine. Search by:

- Case name
- Judge name
- Type of case
- Jurisdiction
- Topic
- SIC code
- Keyword
- Date

Price: $415 per year
BVResearch Pro helps you find answers even more easily than ever before. Stay current with access to more than 15,000 articles (and counting), legal digests, and more from the world’s foremost thought leaders in business valuation.

Get the most current valuation research

- BVResearch Pro’s powerful search engine returns a wealth of news, articles, legal digests, books, and webinar transcripts with a few clicks of a mouse
- BVResearch Pro content is added real-time so you’ll never have to wait for an important article or news item

Access an unprecedented wealth of news and legal analysis in one platform

- Articles from all current and historical Business Valuation Update issues
- Important business valuation legal cases and analysis from BVLaw
- Partner articles from ASA Review™, Journal of Business Valuation, Valuology, and more
- Nearly 100 BVR-published books and over 700 BVR transcripts from webinars

Price: $1,650 per year
BVR publications provide current thought leadership in the valuation profession with comprehensive guides, books, and special reports on timely topics.

Digital Library & Publications

Pricing valid through March 31, 2024
Digital Library

BVR publications bring you the most up-to-date thought leadership in the business valuation profession. And now these valuable resources are at your fingertips in a digital format. Get immediate access to the entire library of BVR-published titles (nearly 100 books and special reports) focused on industry valuation techniques, methodology, and more. And, each time a new BVR title is released, you get immediate access to it with your subscription—often before it’s available for individual purchase.

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- Access publications that focus on business valuation methodology, how-tos on an industry-by-industry basis, and more
- Save time and money by stocking your library with digital valuation publications for a fraction of the price

Navigate valuation pitfalls and avoid mis-steps

- Utilize the robust search capabilities, continual updates, and instant access when new titles are released
- New publications include topics such as economic damages, medical practice specialties, fair market value under the Stark regulations, and many more!
<table>
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<tr>
<th>Title</th>
<th>Author/Editor</th>
<th>Price</th>
<th>Publisher</th>
<th>Print Format</th>
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<td>FactSet Mergerstat Review, 2023</td>
<td>Author/Editor: FactSet Mergerstat</td>
<td>$579</td>
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<tr>
<td>Understanding Business Valuation, 6th Edition</td>
<td>Author/Editor: Gary Trugman</td>
<td>$95</td>
<td>(Other formats available)</td>
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<tr>
<td>Benchmarking Identifiable Intangibles and Their Useful Lives in Business Combinations, 3rd Edition</td>
<td>Author/Editor: Bill Scally, Jimmy Pappas, and Steve Veenema</td>
<td>$310</td>
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<tr>
<td>BVR Guide to Management Projections and Business Valuation: Analysis and Case Law</td>
<td>Author/Editor: Shannon Pratt</td>
<td>$249</td>
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<tr>
<td>The Comprehensive Guide to Economic Damages, 7th Edition</td>
<td>Author/Editor: Bill Scally, Jimmy Pappas, and Steve Veenema</td>
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<td>Business Valuation in Divorce Case Law Compendium, 5th Edition</td>
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<td>Business Valuation and Bankruptcy Case Law Compendium, 3rd Edition</td>
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<td>Intellectual Property Valuation Case Law Compendium, 4th Edition</td>
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