The most trusted business intelligence at your fingertips.

Where every business valuation begins.

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TRAINING AND CONTINUING PROFESSIONAL EDUCATION
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.
DealStats

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 43,600 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 comparable data in any other source.

Bolster your research with the most trusted comparables available.

- **Defend your business value conclusions with real-world deal**
  Get detailed statistics and comprehensive summary reports that include financial ratios, valuation multiples, financial statements, purchase price allocations, and more

- **Easily customize your search**
  Use the robust search functionality to explore up to 199 data points and to perform custom searches to save and revisit

- **See current and historical comprehensive financial statements**
  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 a quarterly analysis of private-company acquisitions**
  Each quarter, subscribers get the DealStats Value Index, an analysis of private-company acquisitions from DealStats

Price: $1,050 per year . $365 per day pass
BIZCOMPS

BIZCOMPS, a comprehensive online database, is the most thorough and accurate resource for financial details on “Main Street” private companies. This must-have tool includes more than 13,450 deals dating back to 2006 and removes marketplace uncertainty with access to meaningful financial information. Designed for accountants, business appraisers, and business intermediaries, it is the most trusted source for small-company comparables.

The BIZCOMPS Analyzer (included with a subscription) bolsters a user’s confidence in subject-company research like never before. This unique, Excel-based tool greatly improves a user’s ability to select and deselect transactions, complete a detailed analysis, and export custom worksheets to a new Excel workbook.

- **Support your valuation conclusion**
  Get empirical evidence from 21 data fields on more than 13,450 transactions, including two valuation multiples

- **Bolster your research**
  Access the BIZCOMPS Analyzer, an Excel-based tool that computes valuable statistics and ratios

- **Easily search the platform**
  Search by keyword, NAICS or SIC code, revenue, or sale date, and pinpoint the small-company comparable data you need

- **Get the BIZCOMPS/BVR Deal Review**
  Access the PDF publication that summarizes and analyzes general trends, valuation multiples, and operating ratios for transactions in the BIZCOMPS database

Remove marketplace uncertainty with trusted Main Street data.

Price: $629 per year . $229 per single search
Cost of Capital Professional

Based on principles of simplicity and transparency, the Cost of Capital Professional platform provides appraisers and financial professionals with 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.

Use the buildup method or CAPM to create a cost of equity calculation you can use in your valuation, compute WACC, access a summary document you can insert into your valuation report, and export all of your figures, calculations, sources, and notes into Excel. Subscribers receive access to Industry Betas, a quarterly report that provides levered and unlevered industry betas by industry, subindustry, and geographical region.

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

- **Simplicity:** Get a straightforward and supportable cost of equity figure, and spend less time explaining your methodology choices to clients—and judges.

- **Credibility:** The Cost of Capital Professional platform relies on the Center for Research in Security Prices (CRSP) market return data set. This is the most respected and widely used basis for 10-decile returns in practice and academia.

- **Transparency:** You will always see the components of your cost of capital, how the figures were calculated, and the citations of all sources used—everything you need to support your work.

Affordable site license pricing available for your entire firm. Contact BVR at info@bvresources.com or 1-503-479-8200.

Price: $295 per year ($100 for each additional user)
Mergerstat Control Premium Study

Rely on more than 20 years of detailed transaction data with the web-based FactSet Mergerstat/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 receive access to the Mergerstat quarterly Control Premium Study report PDFs.

- New benefits added to the platform! Includes invested capital premiums and discounts, in addition to the existing equity discounts and premiums

- Effortlessly search the robust platform
  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 transaction reports
  Reports include in-depth transaction details, premiums, discounts, sale details, target financial data, and target pricing multiples

- Stay current with quarterly reports
  Subscriptions include the quarterly Control Premium Study report PDFs as well as access to historic issues

Price: $775 per year . $465 for day pass
Mergerstat Review

The FactSet Mergerstat Review publication, built and designed for the business valuation and M&A market, is the de facto source for M&A data and analysis. This comprehensive resource 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.

The FactSet Mergerstat Monthly Review (a monthly PDF report included with your 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.

- **Now includes SPAC transactions**
  Access special purpose acquisition company (SPAC) transactions with tables to highlight aggregate deal volumes and deal values for your analysis.

- **Arm yourself with insight into trends**
  View prices, methods of payment, premiums, and other critical information related to the overall M&A market

- **Consult real-world statistics**
  Explore which industries are most active and what their respective premiums, TIC/EBITDA, TIC/EBIT, and P/E averages are compared to the market as a whole

- **Access industry data**
  Perform M&A analysis based on industry spotlights, multiples, premiums, and cross-border activity

Price: $579 for Print or PDF  .  $679 for Print and PDF  (Includes FactSet Mergerstat Monthly Review)
Stout Restricted Stock Study

The Stout Restricted Stock Study platform, updated quarterly, has over 760 rigorously screened restricted stock transactions with up to 60 data fields per transaction. The thoroughly vetted data in the Stout Restricted Stock Study provide empirical support to quantify discounts for lack of marketability (DLOMs) used in the business valuation and investment professions.

Save time with the included Stout DLOM Calculator. This easy-to-use tool allows you to implement the Stout methodology and determine a DLOM that is driven by the financial characteristics of your subject company, as well as the volatility of the market as of your valuation date.

- Rely on firsthand, current empirical data
  Updated quarterly and rigorously screened, each restricted stock transaction includes up to 60 data fields with verifiable details

- Present DLOM conclusions with confidence
  This powerful tool automatically calculates summary statistics for a number of fields to aid in the analysis of the data

- Access the Stout DLOM Calculator
  Utilize the calculator to perform DLOM methodology based on your subject company

- Save time deriving your DLOM
  Use the detailed reports to make comparisons between subject companies and issuers of restricted stock and automate quintile sorting, comparisons, and calculations

Price: $789 per year—Includes the Stout Calculator . $275 per single Calculator use
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 18,700 pre-IPO transactions from 1985 to the present. 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”
  Use the platform used by the “Big Four” accounting firms and the IRS

- Quickly find comparable transactions
  Easily search more than 18,700 transactions by industry, business description, and revenues

- Have the most current pre-IPO data
  Monthly updates provide the most timely information available

- Access quarterly data
  View a summary chart of median DLOMs by year for each pre-IPO time frame

- Capture lack of marketability discount data
  Take advantage of advanced search results that include statistics on count, range, mean, and median

Price: $699 per year
Guideline Public Company Comps Tool

Put the Guideline Public Company Comps Tool to work for you—it's fast and current. Access complete financial statements, financial ratios, and multiples for comparable companies—and then easily save your comps or export your results to Excel. In addition, 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. For those that want to pull data directly into your Excel models, an optional Excel add-in is available.

- **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

- **Perfect your workflow with the optional Excel add-in**
  Harness the power of the Excel add-in and pull all company data directly into your Excel models

- **Review additional comps**
  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

Price: $1,595 per year (up to 5 users)  .  $1,025 per year (single license)
BVR’s 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 in the profession. VBP’s proprietary screening tool 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—so you can see for the first time what conclusions other top analysts reached—and how they got there.

- **Get live links to all source documents**
  See the most appropriate valuation inputs and data employed in similar valuations and access source documents including valuation reports, valuation opinions, and board books

- **Gain insight into how financial analysts chose data**
  See how and when analysts chose various income, market, and asset approaches

- **Explore the best private-company transaction comparables used by your peers**
  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.

“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

Objectively quantify total risk using empirical market observations

- **Quickly confirm cost of equity conclusions**
  Get calculations from other sources or methods and compute company-specific risk

- **Save time and money**
  The Butler Pinkerton Calculator performs in minutes the work that would otherwise take hours

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

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.

Get a clearer picture with Vertical IQ’s high-impact industry data

• Save time with hard-to-find small- and medium-sized business intelligence
  Access more than 540 industry profiles to get a closer look into a company’s challenges, industry risks, industry trends, financial metrics, news/current events, and more.

• Easily access local economic data
  Vertical IQ tracks local economic data, business growth, startup activity, and industry statistics for more than 400 metro areas and 3,400 countries

• View US sector profiles
  Vertical IQ has added US sector profiles enabling a more in-depth analysis of major parts of the US economy

• Quickly locate relevant industry benchmarking data
  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. Visit us online for more info.)
Bizminer

Bizminer has delivered quality online analytical content to valuation professionals 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. This platform consistently delivers new reports and information with market data refreshed monthly and financial content twice a year. The reports present to-the-point intelligence in easy-to-read, easy-to-customize, and easy-to-communicate formats.

• **Save time and money**
  Bizminer has the most cost-effective industry and geographic data on 9,000 industries in thousands of U.S. market areas

• **Get the most current data**
  Bizminer uses more sources than any other similar report, including the IRS, U.S. Economic Census, Bureau of Labor, and more

• **Get access to every report with a Bizminer Pro subscription option**
  Subscribe to the Bizminer Pro and get 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, Vestimate Name Search, SWOT XPRESS, and 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 Profiles

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.

- Grasp how an industry operates
  Understand the competitive environment, and stay abreast of government regulations

- Let First Research do the “heavy lifting”
  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 find the industry profile you need
  Search by SIC code, NAICS code, or industry name

- Stay current with industry changes
  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 Profile Subscription . $469 per year Canadian Industry and Province Profile Subscription
$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 and cost-effective report. This robust resource can easily be used as a basis for the current economic conditions portion of your valuation reports. And, with an expanded set of graphs and charts, you will have the most comprehensive and accurate data.

- **Save money on expensive research with in-depth data in one report, including:**
  - GDP
  - Unemployment
  - Consumer spending
  - Stocks and bonds
  - Real estate market
  - Energy prices
  - And much more!

- **Access a handy state-by-state summary**
  Get links to economic information sites for local reviews and forecasts

- **Easily use the data directly in your reports**
  Delivered in PDF, Microsoft Word, and Microsoft Excel formats to ensure you can quickly use the data

- **Stay current**
  Monthly updates, four quarterly reports, and historical reports back to 1Q2003

- **Rely on accurate and comprehensive data**
  Our forecasts are based on 30 of the most prominent U.S. economic and financial forecasts

Price: $369 per year . $165 per single issue
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. With user-friendly search functionality and sophisticated data mining capabilities, ktMINE quickly finds market comparables from more than 20,000 licensing agreements and more than 70,000 royalty rates, with new agreements continuously added.

• Run unlimited searches and view unlimited agreement summaries
  ktMINE houses thousands of public agreements and includes license agreements, service contracts, referral agreements, and more!

• Easily search the database to find true market comparables
  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

Find true market comparables with ktMINE licensing agreements

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

Practitioners have welcomed the launch of RCReports, the new platform created especially for business appraisers, and early feedback indicates the gap in compensation resources may be a problem of the past. RCReports delivers a streamlined solution built on 12.9 million wage data points and a proprietary system. Heralded by CPAs, business appraisers, forensic accountants, and attorneys as the new 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.

• **Cost-effective:** Quickly and easily run a reasonable compensation analysis for your clients in a fraction of the time with the RCReports online tool. Complete in mere minutes the analysis that previously depleted hours of your time.

• **Defensible:** All reasonable compensation reports contain an independent, unbiased reasonable compensation figure that you can rely on for IRS examinations and litigation engagements. Every report includes supporting resources, including case law, IRS rulings, white papers, and more!

• **Accurate:** Easily choose the approach that best fits your engagement, or run multiple approaches and reconcile them to develop accurate wage data supported by an independent source and forecasts.

**Price:** $749 per year (basic) . $1,049 per year (premium)

The *Business Reference Guide (BRG)* is the essential guide to benchmark and price businesses and franchises. With up-to-date rules of thumb and industry and pricing information for 600+ types of businesses, the BRG is a vital tool for any stakeholder in a privately owned business. With the *Business Reference Guide* 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! In addition, the online database includes a a print copy of the current year’s BRG.

- **Take advantage of the easy-to-use search tool**
  Search the most current data available using keywords or SIC and NAICS codes. The BRG Online is updated continually throughout the year.

- **Use rules of thumb, pricing tips, and benchmark data to prepare informational packages or marketing pieces for clients and prospects.** Most pricing entries contain:
  - Rules of thumb based on both sales and earnings (seller’s discretionary earnings)
  - 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

**Price:** $376 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.
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 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 much more!

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- Bulletproof your valuation conclusion
  Incorporate the latest research and findings in your report or expert witness testimony

- Save time with our state-of-the-art search functionality
  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, the BVU includes historical economic data and forecast charts

Price: $459 per year (includes online access, PDF download, and print version)
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, estate and gift tax, divorce, shareholder oppression, partnership dissolution, securities litigation, 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 valuation decisions.

• Eliminate the need for cumbersome searches
  BVLaw includes legal analysis and full-text court opinions that date back to 1925

• Save time and minimize your legal research fees
  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 with advanced search functionality. Search by:
  • Case name
  • Judge name
  • Type of case
  • Jurisdiction
  • Topic
  • SIC code
  • Keyword
  • Date

Price: $399 per year

Minimize your legal research fees with unlimited searches
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• Access current and popular titles: New publications include topics such as economic damages, management projections, benchmarking intangibles, valuing insurance agencies, and many more!
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