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Detailed industry financial and geographic data covering thousands of industries

First Research Industry and State Profiles
Detailed reports, by SIC and NAICS code, for industry and state/province analysis

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Royalty rate data and IP license agreements

RCReports
Objective and accurate reasonable compensation reports

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info@bvresources.com
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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?

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- M&A professionals
- Business intermediaries
- Attorneys and judges
- Private equity professionals and venture capitalists
- Business owners
- CFOs
Deal & Market Data

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 October 31, 2023
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.

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

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.

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: $1,125 per year . $395 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 15,160 deals dating back to 2009 and removes marketplace uncertainty with access to meaningful financial information.

Bolster your valuation research and conclusion

- Get empirical evidence from 21 data fields on more than 15,160 transactions, including two valuation multiples
- Access the BIZCOMPS Analyzer, an Excel-based tool that computes valuable statistics and ratios

Get the small company comparables you need

- Easily search by keyword, NAICS or SIC code, revenue, or sale date, and pinpoint the small-company comparable data you need
- Access the BIZCOMPS/BVR Deal Review, a PDF publication that summarizes and analyzes general trends for transactions in the platform
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

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. You will always see the components for your calculation.

Price: $295 per year ($100 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 15,500 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 Factset 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 the 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
- Subscriptions include the quarterly Control Premium Study report PDFs as well as access to historical issues

Price: $819 per year . $489 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

Price: $579 for Print or PDF . $679 for Print and PDF (Includes Flashwire US Monthly)
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).

Rely on firsthand, current empirical data

- 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

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

Price: $799 per year—Includes the Stout Calculator . $285 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 18,800 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: $725 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

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 CSRPCs for up to 12 publicly traded stocks at any one time

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“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
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 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

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.

## Industry Financials

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<tr>
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<th>Trend</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Business Revenue</td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Cost of Sales</td>
<td></td>
<td>30.0%</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>62.04%</td>
</tr>
<tr>
<td>Officers Comp.</td>
<td></td>
<td>4.37%</td>
</tr>
<tr>
<td>Salary-Wages</td>
<td></td>
<td>21.56%</td>
</tr>
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</table>

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 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.

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
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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. This robust resource can be used as a basis for the current economic conditions and forecast portion of your valuation reports. And, with an expanded set of graphs and charts, you will have the most comprehensive data.

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: $395 per year . $175 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.

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.
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. Hailed 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 contains an independent, unbiased reasonable compensation figure that you can rely on for IRS examinations and litigation engagements

<table>
<thead>
<tr>
<th>Location</th>
<th>Low</th>
<th>High</th>
<th>Suggested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles-Long Beach-Anaheim, CA</td>
<td>56,385</td>
<td>70,848</td>
<td>61,901</td>
</tr>
<tr>
<td>California</td>
<td>56,524</td>
<td>71,009</td>
<td>62,042</td>
</tr>
<tr>
<td>National</td>
<td>51,052</td>
<td>64,142</td>
<td>56,042</td>
</tr>
</tbody>
</table>

**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)
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- Date

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**Price:** $1,425 per year
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Author/Editor: FactSet
Print: $579
(Other formats available)

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Author/Editor: Gary Trugman
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Print: $249 (Other formats available)

Print: $249 (Other formats available)

The Comprehensive Guide to Economic Damages, 7th Edition
Author/Editor: Bill Scally, Jimmy Pappas, and Steve Veenema
Print: $299
(Other formats available)

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Print: $249
(Other formats available)

Business Valuation and Bankruptcy Case Law Compendium, 3rd Edition
Print: $249
(Other formats available)

Print: $249
(Other formats available)

Valuing a Business, 6th Edition
Author/Editor: Shannon Pratt
Publisher: McGraw Hill Co.
Print: $95

Closed-End Fund Report: Stocks and Equity Investments
Print: $295

Closed-End Fund Report: Fixed Income Securities
Print: $295

2023 Business Reference Guide
Author/Editor: Tom West
Publisher: Business Brokerage Press
Print: $192
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PDF: $199

What It’s Worth: Valuing Full-Service Restaurants
PDF: $149

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PDF: $199

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Print: $249
(Other formats available)

Business Valuation Case Law Yearbook, 2023 Edition
Print: $249
(Other formats available)

The Complete Guide to Fair Market Value Under the Stark Regulations
Author: Timothy Smith
Print: $149
(Other formats available)

Authors: John Tatlock, Kevin Yeanoplos, Ron Seigneur
Print: $179
(Other formats available)

Engagement Guide to Understanding and Valuing Medical Practice Specialties
Author/Editor: Mark Dietrich
Print: $219
(Other formats available)

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- Determining Reasonable Compensation
- Understanding Control vs. Lack of Control
- Patent Infringement Damages

eLearning Courses
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- Excel for Valuation
- International Valuations

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- Healthcare
- Fair value

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- Valuing restaurants
- Valuing dental practices

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- Houston’s ASA Energy Conference
- ASA/USC Fair Value Conference
- And many more!

*All webinars and workshops are also available for individual purchase.
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Seamlessly convert PDF tax returns into Excel in minutes

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Securely upload pdf business tax returns (including scanned files), let Nambri TaxXL do its work, and export tax form information into Excel spreadsheets. Nambri TaxXL reduces errors, improves efficiency and saves you time. Nambri TaxXL will even create common size statements for you.

Value Analytics

An Excel add-in that offers financial statement and equity data for publicly traded companies

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