

# Bentley University Trading Room

(Operating Hours and Policies)

(Update: December 8, 2022)

## Virtual Front Desk

(Staff on Duty: hours posted on next page)

Please click on the Zoom Id below to connect with our analyst on duty:

<https://bentley.zoom.us/my/tradingroomvirtualassistants>

## Trading Room Calendar

(<https://www.bentley.edu/centers/trading-room/calendar>)

Provides information on:

- Tutorials sessions on Bloomberg, FactSet, Cap IQ, and Morningstar (click on a desired tutorial slot on the calendar)
- Fireside Chats (in-person and zoom)

## Wall Street 101 Summer Program

<https://www.bentley.edu/centers/trading-room/wall-street-101>

## General Guidelines

Trading Room resources (databases, software, and physical facility) are available for academic purposes for Bentley University faculty, students, and staff. Any unauthorized use of these resources for personal or commercial use is strictly prohibited.

# Bentley Trading Room Operating Policy

- Operating hours:
  - **On-site:** 9 am to 11 pm (M-Th), 9 am – 5 pm (Friday), 12 pm-5 pm (Saturday), and 11 am -9 pm (Sunday).
  - **Online:** Join Front Desk Zoom Session: <https://bentley.zoom.us/my/tradingroomvirtualassistants>
- Access to databases: Some of the Trading Room databases may be accessed remotely by obtaining access id and password from the database providers. Instructors can contact us for bulk accounts creation at the beginning of the semester. It takes two weeks to create account ids.
- Access to Bloomberg terminals is available only in the Trading Room. Contact us for additional information.
- Fireside Chats and Tutorials will be conducted in-person and online. Staff will be available in-person and online during our normal hours to answer questions.
- Seating capacity: The maximum number of visitors is 45 at a time (excluding 2 Trading Room staff). Business suite has an additional seating capacity of 12. The Conference Room has video conferencing capacity and is ideal for small group meeting. Seating capacity is 6. Contact the staff on duty to reserve the room.
- Card swipe and social distancing: We are not requiring card swipe to enter the Trading Room but it could change per Bentley University guidelines. You are welcome to wear a mask if you are comfortable with it. Please comply with all guidelines for COVID testing and social distancing rules, as mandated by Bentley University.
- Method of communication: We will use the website to communicate with faculty, staff, students and visitors.
- Reserving the Trading Room: Instructors/students/ and staff can request to reserve the Trading Room for meetings and classes by going to the web reservation page: (<https://www.bentley.edu/centers/trading-room/calendar>).

# Zoom Sessions: Tutorials and Fireside Chats

**Zoom Tutorial Sessions on Bloomberg, FactSet, Morningstar, and Cap IQ:** Trading Room staff will be offering tutorials on Bloomberg, FactSet, Morningstar, and Cap IQ databases. The plan is to offer each of these tutorials once a week. We will post the time slots and Zoom session ids for these 30-60 min long sessions on our Trading Room Calendar. Simply join the Zoom session that fits your schedule. **Only Bentley students, faculty, and staff with valid Bentley email can join these sessions.** Click on a session that fits your schedule, register, and then show up at scheduled time.

<https://www.bentley.edu/centers/trading-room/calendar>

**Fireside Chats:** Fireside Chats will be hosted in-person and on Zoom. Open to all. Please monitor our calendar for additional information (time of events). The Zoom link is:

<https://bentley.zoom.us/meeting/register/tjUucuyhrj8rH9fd2D8RnqON75KmAyHQzPwN>

Access to Bloomberg Terminal, FactSet, Cap IQ, and Morningstar Direct

# Access to Bloomberg

**Bloomberg Terminal:** Bloomberg has cancelled REMOTE access to the Bloomberg terminals for all universities. As a result, our 24 Bloomberg licenses have been re-installed in the main floor and the business suite.

To access the Bloomberg terminal in the Trading Room,

- a new user needs a Bloomberg account using a Bentley issued email. See next page for detailed description. Please reach out to the Trading Room staff for additional assistance.
- For any problems with Bloomberg, please contact the Trading Room staff. You may also be asked to contact the Bloomberg directly.
- If your account has been frozen for inactivity, you will have to contact Bloomberg directly. The number is 212-318-2000.

# Creating a Bloomberg Account: New User

**You have two options to create a new user account:**

**Option 1: Creating a Bloomberg Account by visiting the Trading Room (recommended option)**

Log in to any computer in the Trading Room:

- Id: studentuser
- Pwd: studentuser
- Next, click on the Bloomberg icon on the desktop to launch Bloomberg
- Towards the bottom of the screen, click on **Create a New Login**
- Provide information for verification. Once authorized (in 1 minute), you can use your new account id and pwd to login to Bloomberg Terminal in the Trading Room.

# Creating a Bloomberg Account: New User

**Option 2: Creating a Bloomberg Account remotely. This option requires that you first create a Bloomberg Market Concept (BMC) account.**

- **Create a BMC account at:** [https://portal.bloomberforeducation.com/sign\\_up](https://portal.bloomberforeducation.com/sign_up). Go through the Bloomberg verification process. **For course id, please contact the Trading Room staff.**
- **Once a BMC account has been created, you can use your BMC account to**
  - **complete BMC courses on the web (separately managed by Bloomberg).**
  - **Access Bloomberg terminal:** You can go to the Trading Room and login to a terminal.



# Remote Access to FactSet, Cap IQ, and Morningstar Direct

FactSet and Cap IQ are available via two modes:

- Remote access (account id is needed)
- On-site in the Trading Room (no account is needed)

**FactSet and Cap IQ:** Bentley University students, faculty, and staff can have personal accounts for online access to these databases. It takes up to 7 days to get an account. Faculty using these databases in your courses should ask their students to request account id by visiting the Qualtrics link below:

[https://bentley.co.l.qualtrics.com/jfe/form/SV\\_d511gfHUjoHKSoZ](https://bentley.co.l.qualtrics.com/jfe/form/SV_d511gfHUjoHKSoZ)

**Morningstar Direct: Contact the Trading Room staff**

# Group Visits to the Trading Room

We welcome visitors (schools, colleges/universities, and businesses) throughout the year. Typically, Friday is the best day to bring your entire class (group) to the Trading Room. For faculty supervised school or college visits, we offer the following program:

- Interactive real-time overview of the capital markets using Bloomberg Terminal
- Interactive trading simulation. Students participate in simulated trading of a particular asset class (stocks and currencies). As simulated news is released, students interpret the news and trade to manage their portfolio.

The entire visit takes maximum 90 minutes. Please use the following link to make a request. Be sure to provide as much details as possible.

- <https://teamup.com/ksl59u3i3uqwwxpw45>