

Package ‘simfinR’

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Type Package

Title Import Financial Data from the 'SimFin' Project

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Description

Uses the 'SimFin' (SIMplifying FINnance) api at <<https://simfin.com/data/access/api>> to download financial data straight into your R session.

It includes financial statements -- balance sheet, cash flow and income statement -- and adjusted daily price of stocks.

The available data is comprehensive, going back to 2005 and available for quarters (Q1, Q2, Q3, Q4) and years (FY).

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BugReports <https://github.com/msperlin/simfinR/issues>

URL <https://github.com/msperlin/simfinR/>

Encoding UTF-8

LazyData false

RoxygenNote 7.1.1

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simfinR_get_available_companies
Get available companies from simfin

Description

Uses the api to get a table of available companies with respective simfin ids. All data is saved temporarily in your R session so you wont spend your dialy quota of api calls.

Usage

```
simfinR_get_available_companies(api_key)
```

Arguments

api_key Your api key

Value

A dataframe with company name and simfin id

Examples

```
## Not run:
api_key <- 'YOURKEYHERE'
df_available <- simfinR_get_available_companies(api_key)

## End(Not run)
```

`simfinR_get_available_statements`*Get available financial statements from simfin*

Description

Uses the api to get available statements for a single company.

Usage

```
simfinR_get_available_statements(id_sim, api_key, silent = TRUE)
```

Arguments

<code>id_sim</code>	Id of company (see simfinR_get_available_companies for downloading a table with ids)
<code>api_key</code>	Your api key
<code>silent</code>	Be silent? (TRUE or FALSE)

Value

A dataframe with available statements

Examples

```
## Not run:  
id_companies <- 59265  
api_key <- 'YOURAPIHERE'  
  
df_available <- simfinR_get_available_statements(id_companies, api_key = api_key)  
  
## End(Not run)
```

`simfinR_get_fin_statements`*Get financial statements from simfin*

Description

Uses the simfin api <<https://simfin.com/>> for downloading corporate financial datasets available at the website. In order to use the function, you'll need a valid api key from <<https://simfin.com/data/access/api>>. All data from the site is locally cached with package memoise, meaning it will never grab repeated data from the api.

Usage

```
simfinR_get_fin_statements(
  id_companies,
  api_key,
  type_statements = c("pl", "bs", "cf"),
  periods = "FY",
  years = 2018,
  cache_folder = "simfin_cache"
)
```

Arguments

id_companies	Simfin Id of companies to get data (see simfinR_get_available_companies for details)
api_key	Your api key (get one at < https://simfin.com/data/access/api >)
type_statements	Types of financial statements ('pl' - profit loss, 'bs' - balance sheet, 'cf' - cash-flow)
periods	Time periods to grab the data: 'FY' - fiscal year (only for 'pl' and 'cf', use 'Q4' for end of year 'bs'), 'Q1' - first quarter, 'Q2', 'Q3', 'Q4'
years	The years to grab data (vector or single value)
cache_folder	Directory for cache files

Value

A dataframe with financial statements

Examples

```
## Not run:
id_companies <- 59265
api_key <- 'YOURAPIHERE'

df_fin <- get_fin_statements(id_companies, api_key = api_key)

## End(Not run)
```

simfinR_get_info_company

Get description information for a company

Description

Uses the simfin api to get information for a single company.

Usage

```
simfinR_get_info_company(id_sim, api_key, cache_folder)
```

Arguments

id_sim	Id of company
api_key	Your api key
cache_folder	Folder to save cache files

Value

A list with information

Examples

```
## Not run:  
api_key <- 'YOURAPIHERE'  
l_info <- simfinR_get_info_company(59265, api_key, tempdir())  
  
## End(Not run)
```

```
simfinR_get_price_data
```

Get price data for a group of companies

Description

This function will use the simfin api to grab adjusted prices of stocks.

Usage

```
simfinR_get_price_data(id_companies, api_key, cache_folder = "simfin_cache")
```

Arguments

id_companies	A vector of ids of companies
api_key	Your api key
cache_folder	The cache folder to save files

Value

A dataframe with price data

Examples

```
## Not run:  
df_prices <- simfinR_get_price_data(59265, 'YOURAPIKEY')  
  
## End(Not run)
```

`simfinR_get_single_fin_statement`*Fetch financial data for a single company*

Description

This is a helper function for `simfinR_get_fin_statements`. It will make calls to the simfin api and save the results in cache.

Usage

```
simfinR_get_single_fin_statement(  
  id_sim,  
  type_statement,  
  period_in,  
  year,  
  api_key,  
  cache_folder  
)
```

Arguments

<code>id_sim</code>	Simfin id of a company (single value)
<code>type_statement</code>	Type of financial statements ('pl' - profit loss, 'bs' - balance sheet, 'cf' - cash-flow)
<code>period_in</code>	Time periods to grab the data: 'FY' - fiscal year (only for 'pl' and 'cf', use 'Q4' for end of year 'bs'), 'Q1' - first quarter, 'Q2', 'Q3', 'Q4'
<code>year</code>	The year
<code>api_key</code>	Your api key
<code>cache_folder</code>	The directory to cache results

Value

A single dataframe with the data

Examples

```
## Not run:  
  
id_companies <- 59265  
api_key <- 'YOURAPIHERE'  
  
df_single_fin <- get_single_fin_statement(id_sim = id_companies, type_statement = 'pl',  
                                         period_in = 'FY', year = 2018, api_key=api_key,  
                                         cache_folder = 'simfim_cache')  
  
## End(Not run)
```

simfinR_get_single_price_data
Get price data for single company

Description

Helper function of [simfinR_get_price_data](#). Will fetch data for a single company and save results in cache.

Usage

```
simfinR_get_single_price_data(id_sim, api_key, cache_folder = "simfin_cache")
```

Arguments

id_sim	The simfin id
api_key	Your api key
cache_folder	Cache folder to save files

Value

A dataframe with adjusted prices

Examples

```
## Not run:  
df_prices <- simfinR_get_single_price_data(59265, 'YOURAPIKEY')  
  
## End(Not run)
```

simfinR_id_to_name *Finds a company name by its simfin id*

Description

Finds a company name by its simfin id

Usage

```
simfinR_id_to_name(id_in, api_key)
```

Arguments

id_in	Id of company
api_key	Your api key

Value

A string (name of company)

Examples

```
## Not run:  
api_key <- 'YOURAPIHERE'  
my_name <- simfinR_id_to_name(59265, api_key)  
  
## End(Not run)
```

simfinR_period_to_date

Period to date

Description

Returns the last date for a given period and year.

Usage

```
simfinR_period_to_date(period_in, year_in)
```

Arguments

period_in	The period ('Q1', 'Q2', 'Q3', 'Q4', 'FY')
year_in	The year

Value

A single date object

Examples

```
first_quarter <- simfinR_period_to_date('Q1', 2019)
```

simfinR_set_fromJSON *Sets memoise cache function*

Description

Uses the memoise package to set a cache function for jsonlite::fromJSON The choice of the cache folder defines where to save the local files. If not set, will use tempdir()

Usage

```
simfinR_set_fromJSON(cache_folder = tempdir())
```

Arguments

cache_folder The local folder where to save files

Value

A memoised function

Examples

```
mem_fromJSON <- simfinR_set_fromJSON()
```

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