

Package: GetDFPData2 (via r-universe)

October 25, 2024

Title Reading Annual and Quarterly Financial Reports from B3

Version 0.6.4

Description Reads annual and quarterly financial reports from companies traded at B3, the Brazilian exchange
<<https://www.b3.com.br/>>. All data is downloaded and imported from CVM's public ftp site
<https://dados.cvm.gov.br/dados/CIA_ABERTA/>.

Depends R (>= 3.5.0)

Imports stringr, xml2, dplyr, readr, lubridate, magrittr, purrr, memoise, rvest, tidyr, RCurl, shiny, writexl, stats, cli, glue, janitor

ByteCompile true

License GPL-2

BugReports <https://github.com/msperlin/GetDFPData2/issues/>

URL <https://github.com/msperlin/GetDFPData2/>

LazyData true

RoxygenNote 7.2.3

Suggests knitr, rmarkdown, testthat (>= 3.0.0), ggplot2, covr, fs

VignetteBuilder knitr

Config/testthat/edition 3

Repository <https://msperlin.r-universe.dev>

RemoteUrl <https://github.com/msperlin/getdfpdata2>

RemoteRef HEAD

RemoteSha e5220c54ba0efe5047fca542fd200b1aee833de3

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export_xlsx	<i>Export DFP/ITR data to a xlsx file</i>
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Description

Export DFP/ITR data to a xlsx file

Usage

```
export_xlsx(l_dfp, f_xlsx = "GetDFPData-XLSX.xlsx")
```

Arguments

l_dfp	A list from get_dfp_data or get_itr_data
f_xlsx	Path to xlsx file

Value

A dataframe with several information about B3 companies

Examples

```
## Not run: # keep cran check fast
df_info <- get_info_companies()
str(df_info)

## End(Not run)
```

get_dfp_data	<i>Downloads and reads DFP datasets</i>
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Description

The DFP (demonstrativos financeiros padronizados) is the annual reporting system of companies traded at B3. This function will access the CVM ftp and parse all available files according to user choices

Usage

```
get_dfp_data(
  companies_cvm_codes = NULL,
  first_year = 2010,
  last_year = lubridate::year(Sys.Date()),
  type_docs = c("BPA", "BPP", "DRE"),
  type_format = c("con", "ind"),
  clean_data = TRUE,
  use_memoise = FALSE,
  cache_folder = "gdfpd2_cache",
  do_shiny_progress = FALSE
)
```

Arguments

companies_cvm_codes	Numeric CVM code of companies. IF set to NULL (default), will return data for all available companies.
first_year	First year of selected data
last_year	Last year of selected data
type_docs	Type of financial documents. E.g. c('DRE', 'BPA'). Definitions: '*' = fetch all docs, 'BPA' = Assets (ativos), 'BPP' = Liabilities (passivo), 'DRE' = income statement (demonstrativo de resultados), 'DFC_MD' = cash flow by direct method (fluxo de caixa pelo metodo direto), 'DFC_MI' = cash flow by indirect method (fluxo de caixa pelo metodo indireto), 'DMPL' = statement of changes in equity (mutacoes do patrimonio liquido), 'DVA' = value added report (desmonstrativo de valor agregado)
type_format	Type of format of document (con = consolidated, ind = individual). Default = c('con', 'ind')
clean_data	Clean data or return raw data? See read_dfplitr_csv() for details
use_memoise	Use memoise caching? If no (default), the function will read all .csv files. If yes, will use package memoise for caching results (execution speed increases significantly)
cache_folder	Path of cache folder to keep memoise and zip files
do_shiny_progress	Whether to use shiny progress indicator (default = FALSE)

Value

A list of tibbles containing all requested financial data. Each element of the list is a table from DFP.

Examples

```
## Not run:
df_dfp <- get_dfp_data(companies_cvm_codes = NULL)

## End(Not run)
```

get_info_companies *Returns a up to date table with information about B3 companies*

Description

Imports a dataset from cvm <<https://dados.cvm.gov.br/>>, containing up to date information about companies, active or not.

Usage

```
get_info_companies(cache_folder = "gdfpd2_cache")
```

Arguments

cache_folder Path of cache folder to keep memoise and zip files

Value

A dataframe with information about available companies in the database

Examples

```
## Not run: # keep cran check fast
df_info <- get_info_companies()
str(df_info)

## End(Not run)
```

get_tickers *Retrieves a ticker list from cvm open data repository*

Description

Retrieves ticker information from <https://dados.cvm.gov.br/dados/CIA_ABERTA/DOC/FCA/DADOS/>.

Usage

```
get_tickers(year = lubridate::year(Sys.Date()))
```

Arguments

year year of the data (2018 onwards)

Value

a dataframe with information about companies and tickers

search_company	<i>Helps users search for a company</i>
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Description

Helps users search for a company

Usage

```
search_company(char_to_search, cache_folder = "gdfpd2_cache")
```

Arguments

char_to_search Character for partial matching

cache_folder Path of cache folder to keep memoise and zip files

Value

A dataframe with information about available companies in the CVM database

Examples

```
## Not run: # dontrun: keep cran check fast  
df <- search_company('petrobras')  
  
## End(Not run)
```

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