

# Package ‘simfinR’

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**Type** Package

**Title** Import Financial Data from the 'SimFin' Project

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## Description

Uses the 'SimFin' (SIMmplifying 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).

**License** GPL-2

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

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

**Encoding** UTF-8

**LazyData** true

**RoxygenNote** 7.0.1

**Imports** dplyr, magrittr, jsonlite, lubridate, memoise, purrr

**NeedsCompilation** no

**Repository** CRAN

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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 <a href="#">simfinR_get_available_companies</a> 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 <a href="#">simfinR_get_available_companies</a> for details)
api_key	Your api key (get one at < <a href="https://simfin.com/data/access/api">https://simfin.com/data/access/api</a> >)
type_statements	Types of financial statements ('pl' - profit loss, 'bs' - balance sheet, 'cf' - cash-flow)
periods	Time periods to grab the data ('FY' - final year, '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>	Single time periods to grab the data ('FY' - final year, '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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