CRSP® RESEARCH DATA PRODUCTS

MOVEIT CLOUD
GETTING STARTED GUIDE

WHO WE ARE:

Founded at the University of Chicago, CRSP has transformed the world of finance. More than 65 years ago, CRSP developed the first market database that allowed investors to measure historic rates of return for U.S. stocks, broadening the appeal of equity ownership. More than 15 years ago, CRSP launched investable indexes that have become trusted by investors globally, including managers of the world's largest mutual fund.

In February 2026, the acquisition of CRSP brought the CRSP Market Indexes—benchmarks for over $3 trillion in U.S. equities—into the Morningstar Indexes family. Additionally, the CRSP Research Data Products, renowned for their academic rigor, historical depth, and accuracy, will further enhance Morningstar's equity research and data capabilities. This integration unites two trusted sources of market insight, reinforcing a shared commitment to transparency, quality, and investor-focused solutions.

CRSP | CENTER FOR RESEARCH IN SECURITY PRICES

Learn more at crsp.org

OVERVIEW

GENERAL INFORMATION AND SUPPORT

This information is available at the Sign On screen, under "Help."

Help: Clicking on the Help link provides details on how to reach CRSP Client Services. Listed on that page are the e-mail and phone contact numbers for support. Also displayed is information for the current user environment, such as IP address, Browser type and version.

GETTING STARTED GUIDE FOR CRSP.MOVEITCLOUD.COM

Through Managed File Transfer, CRSP subscribers can effortlessly download data products either ad hoc, or as scheduled processes.

This document provides basic information on accessing CRSP data through MOVEit. The data can be accessed through the web interface at crsp.moveitcloud.com or through FTPS and SFTP utilities, which allow the scripting and scheduling of the downloading process. Instructions for both methods are provided in the sections below.

As a subscriber, you will be provided a Username and Password which will be used for Sign On.
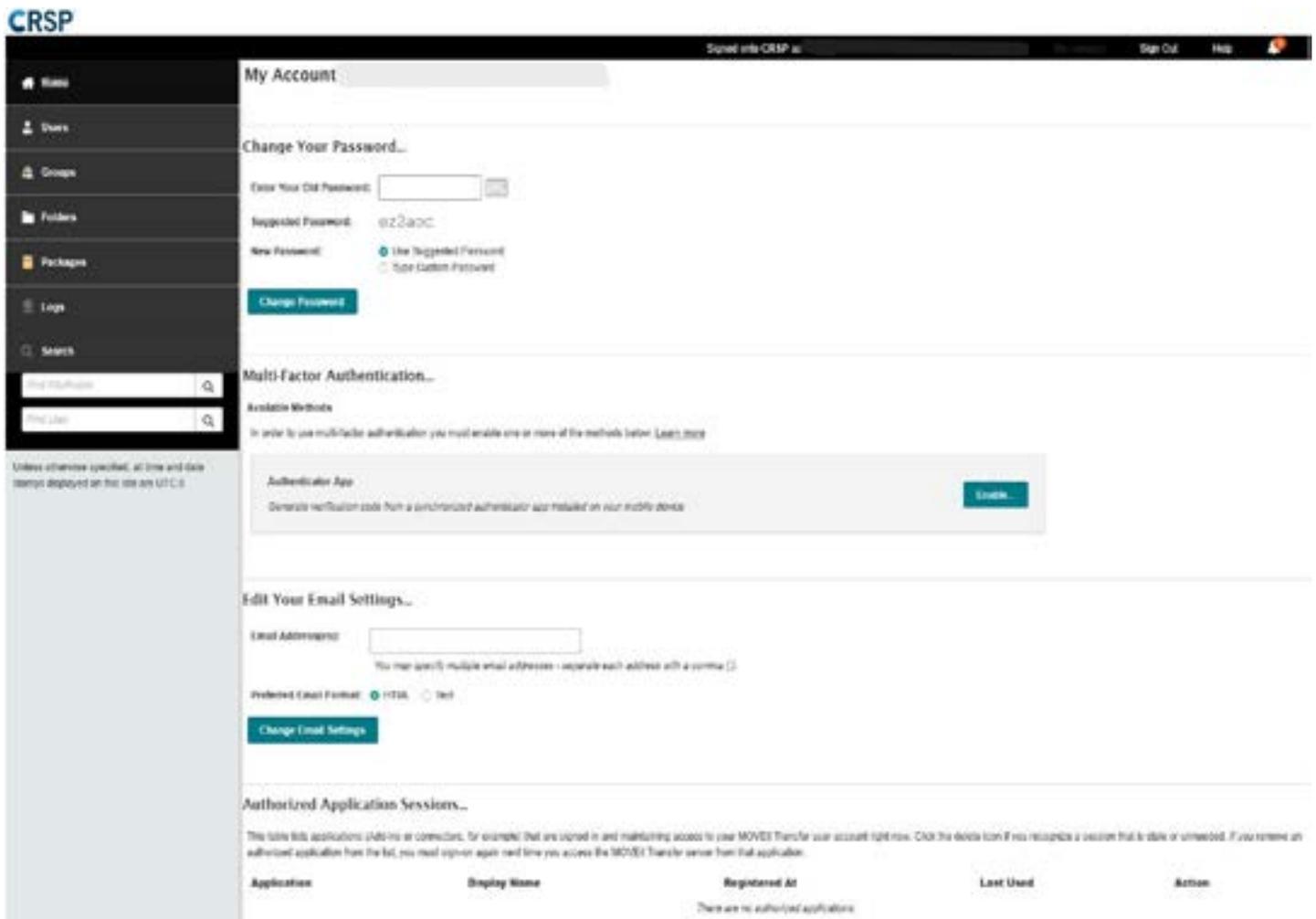
SIGN ON SCREEN

In addition to signing on, the following are available:

- **Help** — for any questions, comments or concerns regarding accessing CRSP data or navigating MOVEit's interface
- **Forgot Password?** — a new password will be emailed

MY ACCOUNT SCREEN

My Account is available on every screen after Sign On by clicking link in upper right corner

At this screen, the following actions are available:

- **Change password**
  - Enter your current password in the provided box, and then select either "Use Suggested Password" or "Type Custom Password" and press the "Change Password" button.

- **Multifactor Authentication**
  - Enable or manage multifactor authentication (MFA) to add an extra layer of security to your account. Once enabled, you'll be prompted for a time-sensitive verification code delivered via an authentication app of your choosing (ex. Google Authenticator/Microsoft Authenticator) each time you log in.

- **Email Settings**
  - Configure the email address associated with your account for notifications, password recovery, and system alerts. You can also opt for text-based emails instead of HTML formatting.

- **Authorized Application Settings**
  - This section will show any sessions currently authorized for programmatic access to your account and CRSP files.

- **Edit Display Settings**
  - This setting controls the numbers of files displayed on a given webpage.
- **Adhoc Transfer Settings**
  - This setting can be safely ignored. You'll receive notification from CRSP should these adhoc transfer settings need updating.

DOWNLOADING FILES

After Sign On, you will be placed in the **Product_Downloads** folder, which contains a folder for each product to which you subscribe:

Clicking on one of the folders here will show what files are available. By default the browser is set for single-file transfer (not using either Wizard). Check boxes (left of each file name) are not functional in this setting.

Files are downloaded using the following actions:

- Clicking on the file name under column "Name" and then clicking "Download" button

- Clicking on "Download" in row with name under column "Actions"

MOVEIT CLOUD VIA COMMAND LINE TOOLS

MOVEit Cloud can be utilized for file transfers using command line tools instead of the browser-based interface. A large number of Secure FTP clients are available for Windows, Red Hat Linux, and Solaris. The list of tested clients can be found by locating the Online Manual under "Need Help?" and navigating to General Information/Client Support.

The MOVEit_Xfer 8.0 program is a command line application that securely transfers files between the CRSP MOVEit Cloud server and a Microsoft Windows computer or any computer running Java 1.4.2 or higher. It uses HTTPS protocol, and extends the functionality of a standard FTP client by adding secure channel communication, resumption of failed transfers, and file integrity checking. In addition, it will not be affected by firewall settings on the destination computer.

Several versions are available after logging in and navigating to the /Utilities_Downloads/MOVEit_Xfer/ folder:

- MOVEit_Xfer_Manual.pdf - contains information, license, and documentation from our provider
- XFer_Java_80.tz.gz - compressed version of application for non-Windows computers
- Xfer_Java_80.zip – zipped version of Java-based version that will work on Windows
- Xfer_Win_80.exe – unzipped version of the application executable file
- Xfer_Win_80.msi – compressed version of Windows Application in msi format
- Xfer_Win_Portable_80.zip – compressed version of the "Portable" Windows application

The MOVEit_Xfer Manual provides a full explanation of the programs, including installation instructions, commands, and sample scripts that can be utilized for automation.

The following provides details on basic installation and transfers for Windows. For assistance with Red Hat Linux or Solaris SPARC versions, please contact CRSP Support.

There are two choices available:

- Xfer_Win_80.msi: utilize where installer has Administrator access and will allow changes to the PATH: variable on the workstation
- Xfer_Win_Portable_80.zip: utilize where user does not have Administrator access, or does not want to make changes to PATH: variable on workstation

USING XFER_WIN_80.MSI:

This program is intended for an installation where the user has Administrator access to their machine, wants to install the client and allow changes to their PATH: variable.

After the installation is complete, it may ask that you log off to apply the path changes. This needs to be done before it is used the first time.

USING THE CLIENT:

The program by default will install to the directory c:\Program Files (x86)\MOVEit\MOVEitXfer. Navigate to that directory and enter the following command:

```
c:\Program Files (x86)\MOVEit\MOVEitXfer>xfer -e:on crsp.moveitcloud.com
```

Type Username and Password when prompted. User will now have the following display:

```
Signed on to crsp.moveitcloud.com
xfer>
```

Type `help all` to display all available commands:

```
xfer> help all
![OSCommand]                    - start Windows command prompt
?                               - same as help
about                           - show version and vendor URL
bell                            - toggle sounds at end of xfer
cd RemoteDir                    - change directory
close                           - signoff
debug                           - toggles debug msgs to console
delete FilePath                 - delete remote file
dir [FileMask]                  - list remote files with details
exit                            - same as quit
get RemotePath [LocalPath]      - download a file
help [all]                      - show list of commands
lcd LocalDir                    - change local directory
ldir [FileMask]                 - list local files with details
lls [FileMask]                  - list local filenames only
ls [FileMask]                   - list remote filenames only
mdelete RemoteMask              - delete multiple remote files
mget RemoteMask [LocalPath]     - get multiple remote files
mkdir RemoteDir                 - make remote directory
mput LocalMask [RemoteDir ["Notes"]] - put multiple files
open URL                        - open a new connection
prompt                          - toggle prompting for m* cmds
put LocalPath [RemotePath ["Notes"]] - upload a file
pwd                             - print working directory
quit                            - quit program
rename RemotePath NewRemoteName - rename remote file
rmdir RemoteDir                 - remove remote directory
user [Username [Password]]      - signoff and signon as new user
xfer>
```

To change the directory on the Cloud server, type `cd <Remote Directory>`

`xfer> cd /Product_Downloads/`

To see what is in current directory, type `dir`:

```
xfer> dir
2013-10-09 15:31:58    <DIR>              AdHoc
2013-05-08 07:56:48    <DIR>              CRSP-Compustat_Merged_MTHSUB
2013-05-08 07:57:19    <DIR>              Index_Only_MTHSUB
2013-05-08 07:57:43    <DIR>              Mutual_Funds_QTRSUB
2013-05-08 07:58:10    <DIR>              REIT_MTHSUB
2013-05-08 07:58:51    <DIR>              Stock_1925_MTHSUB
2013-05-08 07:59:22    <DIR>              Stock_1962_MTHSUB
2013-05-08 08:00:07    <DIR>              Stock_Index_1925_MTHSUB
2013-05-08 08:00:46    <DIR>              Stock_Index_1962_MTHSUB
2013-05-08 08:01:21    <DIR>              Treasuries_MTHSUB
2013-07-22 14:07:31              755000   Welcome.zip
```

To change the Local (destination directory):

```
xfer> lcd c:\temp
Local directory now c:\temp.
```

Example of transfer to local machine:

```
xfer> get Welcome.zip
755000 bytes received in 0.86 seconds at 879953.38 bytes/sec
xfer> ldir
2013-10-11 13:28:14              755000   Welcome.zip
xfer>
```

USING XFER_PORTABLE_80.ZIP:

This program is intended for an installation where the user does not have Administrator access to their machine, does not want to install the client or make changes to their PATH: variable.

After downloading the zip file, extract it to a known directrory, such as c:\my_apps. It will be in a subdirectory called Xfer_Portable_80.

In order to use the secure transfer, it will be necessary to change the directory on the command line to the path where the extracted files are located. After that has been changed, then follow the directions in the section above, "Using the Client," for initiating transfer.

CRSP CONTACT INFORMATION

For further information, please visit our website at crsp.org or email support@crsp.org.