Using Duff & Phelps Navigator Data in ValuSource Pro, BVM Pro, and Express Business Valuation

ValuSource is working on developing the functionality to import the data directly from Duff and Phelps Navigator into our valuation software and expect to have this update available soon. However, until we release the update, we want to provide you with a **manual method** of using Navigator data in our software.

The first step is to use the Navigator and export the spreadsheet (or PDF). If you are using the **buildup method**, you will need the risk free rate, the equity risk premium and the industry risk premium. If you are using the **CAPM**, you will need the risk free rate, equity risk premium and the beta and size premium.

Then follow the instructions below based on what version of our software you have:

ValuSource Pro and BVM Pro

In the past, the Duff & Phelps folder was used to input the variables needed to get the data. With the Navigator, those inputs are in the Navigator and not in the software. This means that the Duff & Phelps folder should be ignored. instead go to the appropriate income method.

The next step is to set the appropriate assumptions. Choose the appropriate Rate Calculation Method. Buildup or CAPM. These should correspond to your selections in the Navigator.

The next assumption to set is to the Decile (CRSP) or Cost of Capital (Risk Premium Report)

If the Decile is selected, then the next two items will be available to select. These select the type and size of the CRSP data. The analysis sheet is not affected by these selections but the report writer will use them to populate the report with the boiler plate text describing them.

If the Cost of Capital or the risk premium report is selected the Type and Size assumptions are greyed out or unavailable.
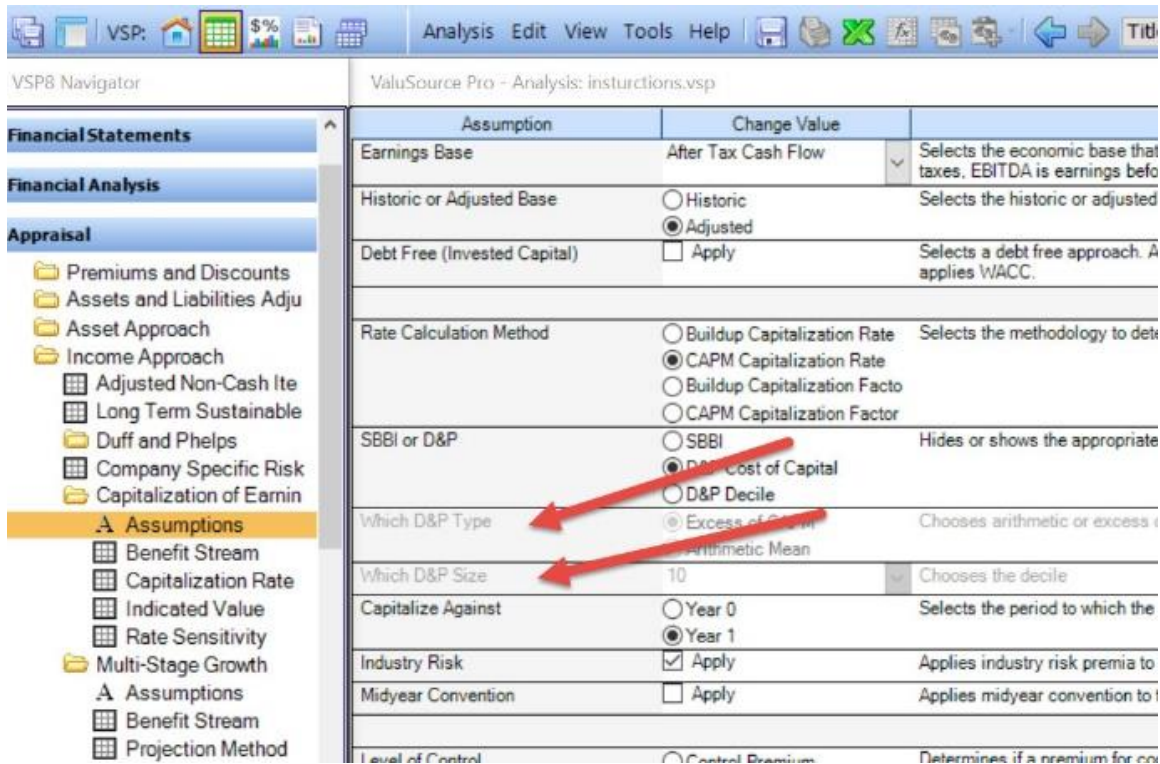
The next assumption to choose is the IRP (Industry Risk Premium) if it is appropriate to the engagement
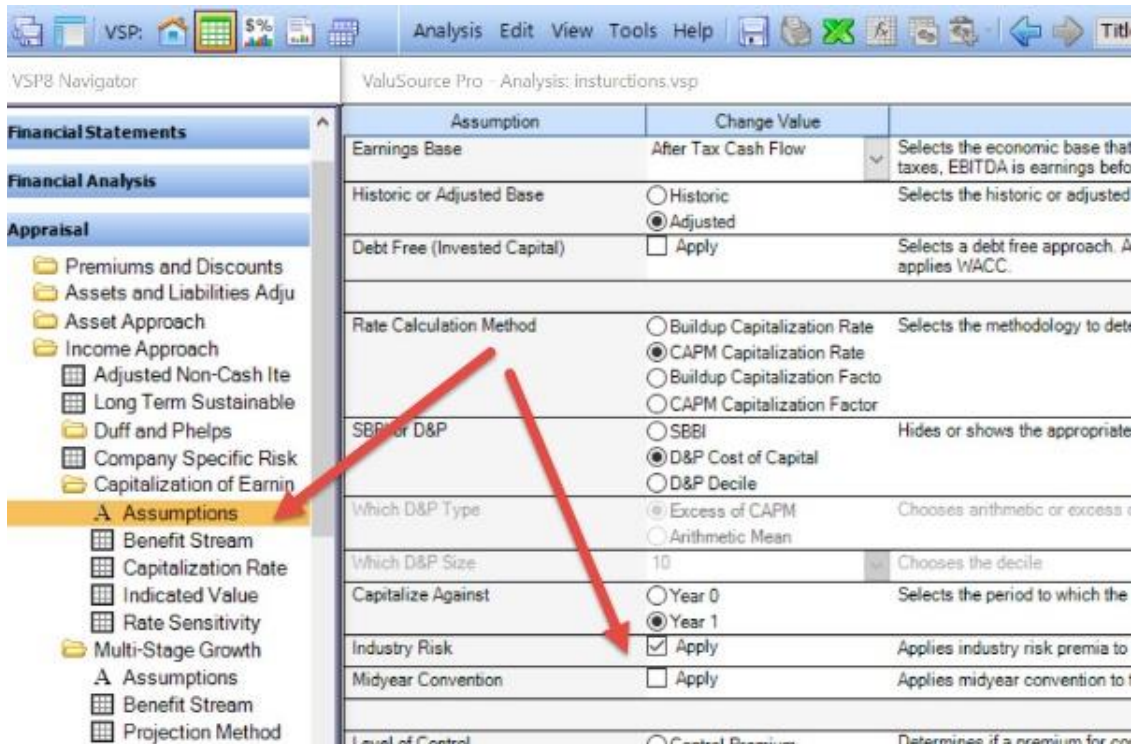
After the assumptions are selected, the schedules need to be filled in. The rate schedule is where the data is input. Depending on the assumption selection the schedule will display different rows. The blue font cells are what need to be typed over to manually input the data.

If the Buildup and Decile assumptions are selected, then the rows open like the picture below. Type in blue font cells.

If the CAPM and Decile assumptions are selected, then the rows open like the picture below. Type in blue font cells. The beta is a white cell and the program is expecting a manual input.

If Buildup and Cost of Capital is selected, then the rows open like the picture below. Type in blue font cells.

Express Business Valuation

In the past, the Duff & Phelps folder was used to input the variables needed to get the data. With the Navigator, those inputs are in the Navigator and not in the software. This means that the Duff & Phelps folder should be ignored. instead go to the appropriate income method.

The next step is to set the appropriate assumptions. Select the Decile (CRSP) or Cost of Capital (Risk Premium Report). This should correspond to your selections in the Navigator
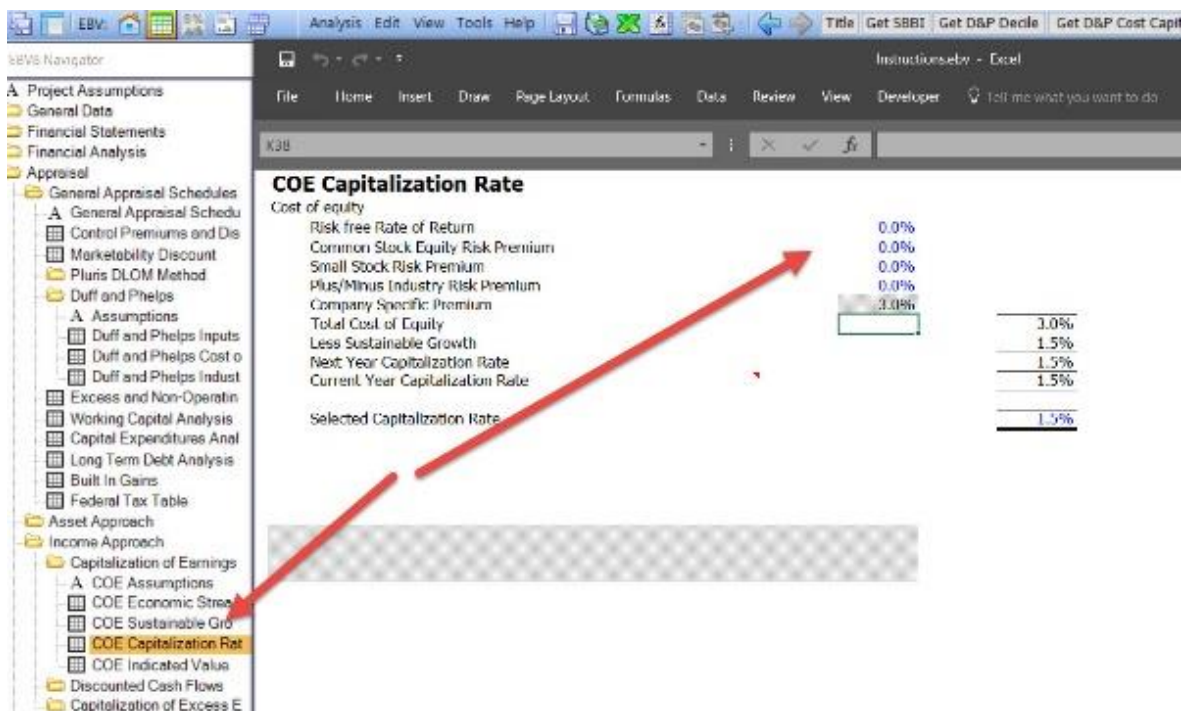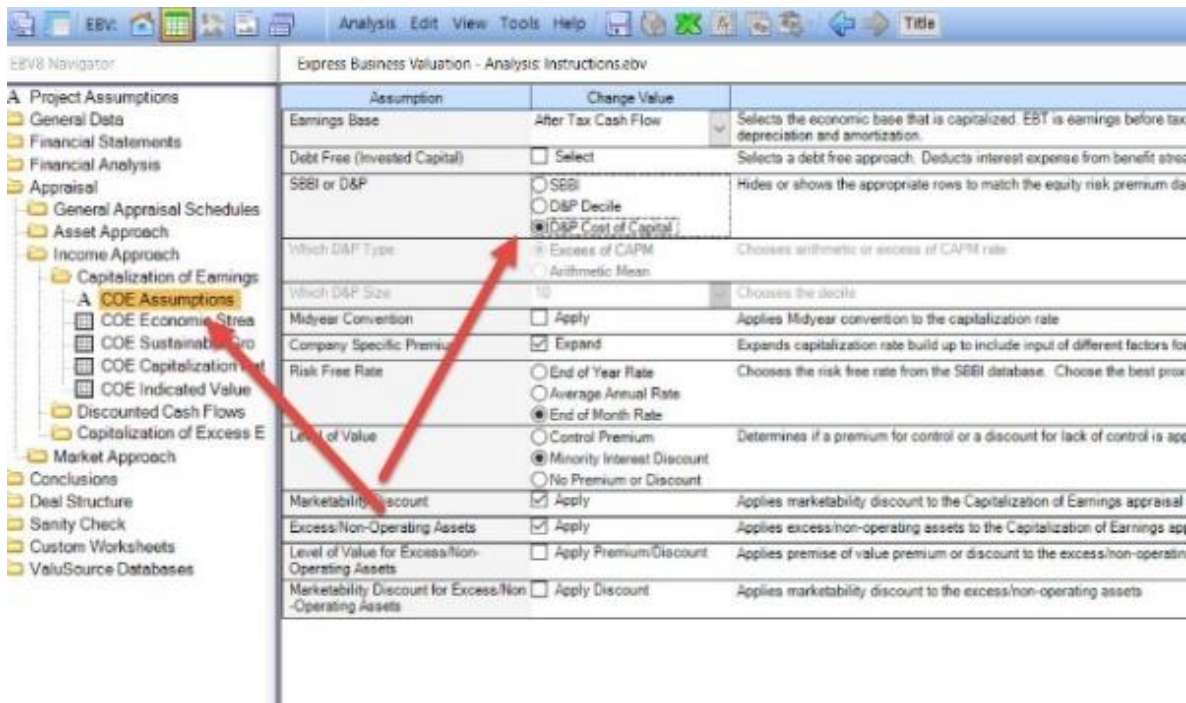

If Decile is chosen then choose the Excess of CAPM and the size. Note that size is used for the report and does not affect the rate schedule.
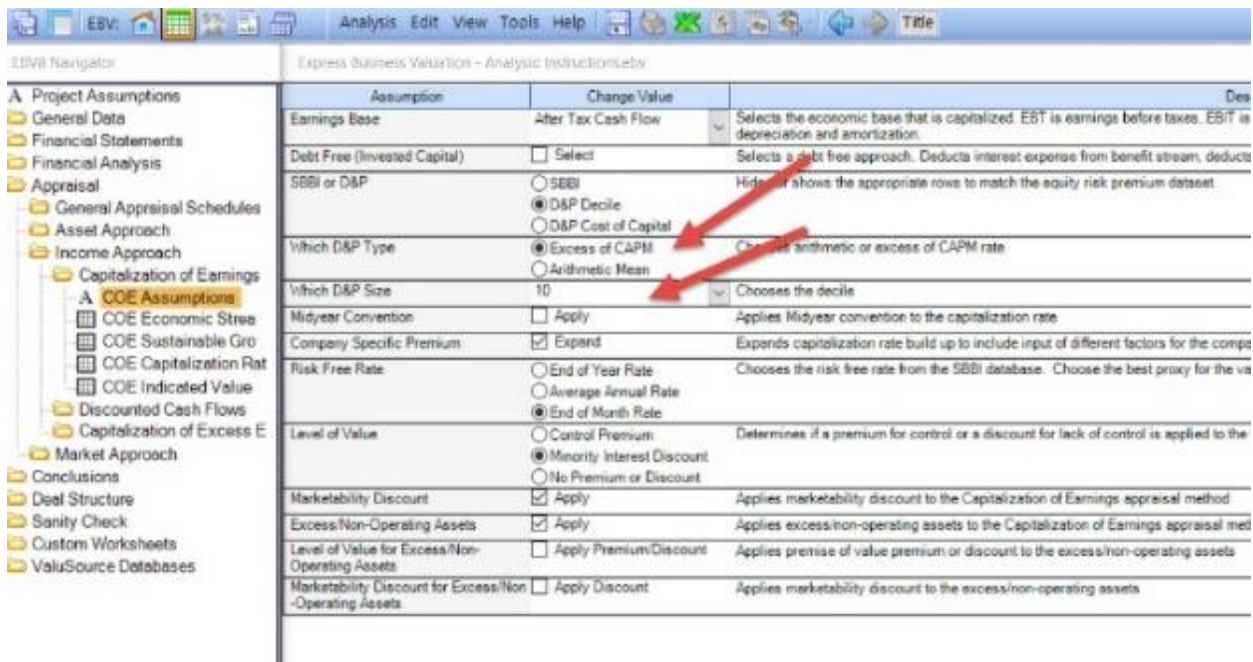
Go to the rate schedule and Input the blue font cells.

If cost of captital or risk premium report is chosen, the Excess of CAPM and size options will be greyed out and no further selections are needed.

Go to the rate schedule and input the blue font numbers with the variables from the Navigator.