MORNINGSTAR

CRSP/Compustat Merged Database Release Notes

October 2026 Monthly Update

CRSP/Compustat SAS, ASCII, and R Files

These files are intended for use with the CRSP SAS and ASCII stock files and Compustat data files that contain GVKEYs and IIDs.

The following table summarizes general characteristics of the CCM database:

While a full subscription is required for either, for convenience and efficiency for some users, two packages are available:

- CFZ – Complete set of all files
- CLZ – Link package - a subset of the full CRSP/Compustat SAS, ASCII and R data files. The set consists only of files used for linking the CRSP and Compustat data. These files are intended for use with the CRSP SAS, ASCII and R stock files and Compustat data files that contain GVKEYs and IIDs.

These files are covered in existing CCM license agreements. To request them for download through CRSP's MOVEit site, please contact us at rdp@morningstar.com or +1 312-384-3735.

About The October 2026 CRSP/Compustat Merged Database

The cut date for these release notes is 20261009.

Calendars

The CCM database utilizes the CRSP US Stock calendars to align properly with CRSP data. Data in the CRSP US Stock daily files use daily and annual calendars. Data in the monthly files use monthly, quarterly and annual calendars.

Calendar	Date Range	Date Index Range
Daily trading Calendar	19251231-20261009	1-26495
Monthly Trading Calendar	19251231-20311231	1-1273
Annual Trading Calendar	19251231-20271231	1-103
Quarterly Trading Calendar	19251231-20271231	1-409
Weekly Trading Calendar	19260102-20261009	1-5258

Database Characteristics

The following table summarizes general characteristics of the CCM database:

Attribute	CCM Format Database
Source	Compustat Xpressfeed
Volume Labels	CMZ20260508 - CRSPAccess
Delivery	CFZ20260508 - Sas/ascii/r
CRSPAccess Version	CLZ20260508 (Link only) - sas/ascii/r
CRSPSift Version (Windows only)	MOVEit Cloud
SASEXCC Engine	3.22 and higher - ts_print com_print
C	Yes - all currently supported versions
Number of Data Items	Version 9.4

Database Parameters	
Total Compustat Records	60934
Total GVKEY Companies	58736
Total GVKEYX Indexes	2198
Total GVKEY/IID Securities	78540
Total CRSP Securities Linked	38450
Total GVKEYS in Link	58686
Total Link Records	129034
Total Link Records with a Link to CRSP	44080

Database Sizes	
CMZ	13.85 GB
CFZ – ASCII	12.29 GB
CFZ – SAS	33.75 GB
CFZ – R	1.69 GB
CLZ – ASCII	1.32 GB
CLZ – SAS	2.20 GB
CLZ – R	55.17 MB

September 2026 Individual Link Edits

GV KEY 3964 DILLARDS INC -CL A

Old:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
19680201	19690528	0	0	00X	NU	C
19690529	19691026	0	0	01	NU	P
19691027	99999999	49429	20584	01	LU	P

New:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
19680201	19690528	0	0	00X	NR	C
19690529	19691026	0	0	01	NR	P

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LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
19691027	99999999	49429	20584	01	LC	P

GV KEY 14733 ABERDEEN GOV MRKT INCOM FUND

Old:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
19861201	19870519	0	0	00X	NU	C
19870520	99999999	75075	21143	01	LU	"P

New:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
19861201	19870519	0	0	00X	NR	C
19870520	99999999	75075	21143	01	LC	P

GV KEY 14734 ABERDEEN INTERMEDIATE INM FD

Old:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
19871101	19880310	0	0	00X	NU	C
19880311	99999999	75260	21137	01	LU	P

New:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
19871101	19880310	0	0	00X	NR	C
19880311	99999999	75260	21137	01	LC	P

GV KEY 37866 VSEE HEALTH INC

Old:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20211130	20211130	0	0	01	NR	P
20211201	20211229	0	0	01	NR	C
20211230	20240628	0	0	01	NR	N
20211230	99999999	22539	58937	02	LC	P

New:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20211130	20211130	0	0	01	NR	P
20211201	20211229	0	0	01	NR	C
20211230	20240628	0	0	01	NR	N

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LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20211230	20260805	22539	58937	02	LC	P
20260806	99999999	0	0	02	NR	P

GV KEY 40583 BRADBURY CAPITAL INC

Old:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20220131	20220228	0	0	01	NR	P
20220301	20220308	0	0	01	NR	C
20220309	99999999	0	0	01	NR	N
20220309	99999999	22915	59142	02	LC	P

New:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20220131	20220228	0	0	01	NR	P
20220301	20220308	0	0	01	NR	C
20220309	20260930	0	0	01	NR	N
20220309	20251022	22915	59142	02	LC	P
20251023	99999999	0	0	02	NR	P

GV KEY 39712 VICARIOUS SURGICAL INC

Old:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20210920	99999999	19803	57157	01	LC	P

New:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20200101	20210919	0	0	00X	NR	C
20210920	20260302	19803	57157	01	LC	P
20260303	99999999	0	0	01	NR	P
20260831	99999999	0	0	02	NR	J

GV KEY 40320 INVEST ACQUISITION CRP -REDH

Old:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20211231	20220131	0	0	01	NR	P
20220201	20220202	0	0	01	NR	C

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LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20220203	99999999	0	0	01	NR	N
20220203	99999999	22777	59086	02	LC	P

New:

LINKDT	LINKENDDT	LPERMNO	LPERMCO	LIID	LINKTYPE	LINKPRIM
20211231	20220202	0	0	01	NR	P
20220203	99999999	0	0	01	NR	J
20220203	20241223	22777	59086	02	LC	C
20241224	99999999	0	0	02	NR	P
20260331	99999999	0	0	03	NR	J

Delivery Method, Installs, and Data Formats

Delivery

CRSP data delivery for all products is available through MOVEit Cloud.

ZIP Installs

CRSP uses a zip process for data installation. ZIP utilities that are standard on all platforms should work to unzip the databases.

Steps to Install:

- From the directory containing your downloaded zip file, right click (in Windows) or run File Roller (in Red Hat)
- Set the extract destination to the current higher-level directory where data is normally stored and unzip will add the rest of the path (default is C:\ in Windows or /home in Red Hat)
- For example, in Windows, extracting to C:\ will install the data under C:\crspdata

Setting Environment Variables for CDAB Database

The zip process will not automatically set environment variables for use with command line tools. The following steps will do so.

Linux

Note: The new zip installs are now saving to directories with lower case letters (e.g. `~/crspdata/diz202605`*)*

Check the current state of the environment variables by entering this command: `env | grep crsp`

- If you have admin privileges on your machine, open the .profile file, and make updates to the following lines to update the paths for the new data installed:
  - CRSP_CCM=<full path name>/<compustat directory> (e.g. `CRSP_CCM=~/crspdata/cmz202605`)
- If you are using the bash shell (or any Bourne-style shell), enter the same commands above and export each one. This will make changes for your current session only and does not save to the .profile file.

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- A shell script is available to make changes that can be reused for each update done. Note that this will only make changes to your current session and does not save to the .profile file.
  - Navigate to where the CUPL tools are loaded and then enter: `cd accbin`
  - Start the script by entering: `./crsp_setup.sh`
  - The script will prompt for the following:
    - File name (will be appended with `.kshrc`)
    - Top level directory (this should be where CUPL tools are located (e.g. `~/crsp`)
    - Scratch directory for error messages – name can be anything
    - Enter path for daily stock directory (e.g. `~/crspdata/diz202605`)
    - Enter path for monthly stock directory (e.g. `~/crspdata/miz202605`)
    - Enter path for index directory (e.g. `~/crspdata/ifz202605`)
    - Enter path for CCM directory – enter to leave blank (example: CRSP_CCM=`~/crspdata/cmz202605`)
    - Enter path for CST directory – enter to leave blank
    - Execute script by running: `. ./<file name created above>.kshrc` (note there is a space between the two dots)

Windows

The CRSP Client Environment utility provides users a way to check the location of the software and to set environment variables. The utility can be started by locating it under installed programs CRSPAccess/CRSP Client Environment, or by navigating to the /accbin folder where the CUPL tools are installed and running: `Client_Environment.exe`. After making any changes, be sure to log off and back into Windows for the settings to be saved.

Support

If you have any questions, please contact us at rdp@morningstar.com or +1 312-384-3735.

For more information, visit our website.

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