

# Package ‘qkiosk’

May 9, 2026

**Type** Package

**Title** 'QUANTkiosk' API Client

**Version** 0.2.31

**Imports** curl, jsonlite, stringdist, zoo

**Depends** xts

**Suggests** fansi

**LazyData** yes

**Date** 2026-04-22

**Maintainer** Jeffrey A. Ryan <jeff@quantkiosk.com>

**Description** Provide access to 'QUANTkiosk' platform of regulatory and corporate data relevant to financial markets including point-in-time fundamentals, ownership and symbology.

**License** GPL-3

**URL** <https://quantkiosk.com/>, <https://github.com/quantkiosk/qkiosk-r>

**BugReports** <https://github.com/quantkiosk/qkiosk-r/issues>

**NeedsCompilation** no

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**Repository** CRAN

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qkiosk-package	<i>'QUANTkiosk' API Client</i>
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## Description

Provide access to 'QUANTkiosk' platform of regulatory and corporate data relevant to financial markets including point-in-time fundamentals, ownership and symbology.

## Details

The DESCRIPTION file:

```

Package:      qkiosk
Type:         Package
Title:        'QUANTkiosk' API Client
Version:      0.2.31
Imports:      curl, jsonlite, stringdist, zoo
Depends:      xts
Suggests:    fansi
LazyData:    yes
Date:         2026-04-22
Authors@R:   person(given = c("Jeffrey", "A."), family = "Ryan", role = c("aut", "cre"), email = "jeff@quantkiosk.com", com
Maintainer:   Jeffrey A. Ryan <jeff@quantkiosk.com>
Description:  Provide access to 'QUANTkiosk' platform of regulatory and corporate data relevant to financial markets inclu
License:      GPL-3
URL:         https://quantkiosk.com/, https://github.com/quantkiosk/qkiosk-r
BugReports:   https://github.com/quantkiosk/qkiosk-r/issues
Author:      Jeffrey A. Ryan [aut, cre] (<https://orcid.org/0009-0003-3627-7896>)

```

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yyyymmdd	Simple Dates

Official QUANTkiosk R API

### Author(s)

NA

Maintainer: Jeffrey A. Ryan <jeff@quantkiosk.com>

### References

'<http://quantkiosk.com>'

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account	<i>QUANTkiosk™ Account Access</i>
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---

### Description

Utilities for account usage and data downloads.

### Usage

```
qk_account(browser=FALSE, files=FALSE)
```

```
qk_download(file = NULL,
```

```
type = c("data", "univ", "trials"),
n = 10, available=FALSE, retjson = TRUE)
```

```
qk_get_apikey(req=TRUE)
qk_set_apikey(apiKey, verbose=TRUE)
```

### Arguments

browser	open account page in browser
files	include custom files (if any) in account
file	file to download
type	data to download - either data or universe files.
available	return table of files and last modified times
retjson	should json be returned as raw string
n	number of files to select from
req	should an error be issued if not present
apiKey	your QUANTkiosk™ api key.
verbose	be verbose

### Details

QUANTkiosk™ accounts control access as well as provide for custom data access.

To set (or get) your API key the functions `qk_get_apikey` and `qk_set_apikey` are provided. These rely your environment variable, which may be set from with your shell or from your session.

`qk_account` provides details on your current usage - as well as access to any custom data files, universe files, or trial data you may have. To access the files for download, the `qk_download` function allows for browsing your remote data as well as downloading via an interactive menu or by specifying the name of the file.

### Value

An invisible list containing:

AsOf	Time of request
Quota	Current daily quota in credits
Usage	Current usage in credits consumed
DataFilesN	Number of custom data files available
DataFiles	List of data files
UnivFilesN	Number of custom univ files available
UnivFiles	List of univ files

### Author(s)

QUANTkiosk™ authors.

## References

QUANTkiosk™ Account Page: '<https://quantkiosk.com/account>'

---

crox

*Crocs Institutional Holders Details By Issuer*

---

## Description

Institutional Holders API example that (tragically) never goes out of style.

## Usage

crox

## Format

A data frame with 214 observations on the following 17 variables.

issuerName name of company

filing canonical EDGAR® filing path

submissionType filing type: 13F-HR or 13F-HR/A (amended)

reportPeriod period of report

filedDate when the data was filed

issuerTitleOfClass reported title or class name

filerCik Central Index Key of holder

filerName name of holder

issuerQkid QKID™ symbol

value fair market value of position at end of period

QQQValue quarter over quarter change in value of holding (QK™ calculated)

shrsOrPrnAmt shares 'SH' or principal 'PRN'

QQSSshPrnAmt quarter over quarter change in shares or principal amount of holding (QK™ calculated)

portWgt portfolio weight (QK™ calculated)

QQQPortWgt quarter over quarter change in portfolio weight (QK™ calculated)

qtrsHeld quarters held (QK™ calculated)

newOrDeleted is position 'NEW' or 'DEL'eted. See details. (QK™ calculated)

## Details

crox provides an aggregated view of holdings across all institutional filers. This is a cross-filer view and is derived from between 5000-10000 individual filings.

## References

Ownership homepage: ‘<https://www.quantkiosk.com/ownership>’  
 Ownership Dashboard: ‘<https://api.quantkiosk.com/ownership>’  
 Ownership API: ‘<https://www.quantkiosk.com/api/ownership>’  
 SG Capital Filings ‘<https://www.sec.gov/edgar/browse/?CIK=0001510099>’  
 Form 13F-HR FAQ: ‘<https://www.sec.gov/divisions/investment/13ffaq>’  
 Official 13(f) Securities ‘<https://www.sec.gov/divisions/investment/13flists>’

## See Also

R function: [qk\\_institutional](#) Aggregated Manager example: [sgcap](#) Non-aggregated Manager (Submanager) example: [deshaw](#)

## Examples

```
data(crox)
```

---

deshaw

*D.E. Shaw Institutional Ownership Details (Including Submanagers)*

---

## Description

Institutional Ownership API example of large manager filing with submanager details.

## Usage

```
deshaw
```

## Format

A data frame with 6481 observations on the following 28 variables.

`filerName` name of filer (i.e. fund name)  
`filing` canonical EDGAR® filing path  
`submissionType` filing type: 13F-HR or 13F-HR/A (amended)  
`reportPeriod` period of report  
`filedDate` when the data was filed  
`inclMgrs` number of submanagers reported for. See `otherManager`  
`issuer` name of instrument  
`titleOfClass` title or class name of instrument  
`issuerSIC` official standardized industrial code  
`issuerSector` two-character sector code from QUANTkiosk™  
`issuerTicker` common exchange ticker

issuerQkid QKID™ symbol  
 value fair market value of position at end of report period  
 shrsOrPrnAmt number of shares held or principal amount  
 putCall one of 'PUT', 'CALL' or empty  
 shrsOrPrnAmtType shares 'SH' or principal 'PRN'  
 invDiscretion type of discretion over investment decision  
 votingAuthSole number of shares of 'SOLE' voting authority  
 votingAuthShared number of shares of 'SHARED' voting authority  
 votingAuthNone number of shares of 'NONE' voting authority  
 portWgt portfolio weight (QK™ calculated)  
 hasOtherManager logical indicating if record is for other manager  
 otherManager reference number of other manager(s) from filing  
 otherManagerName name of other manager(s) from filing  
 otherManagerFileNumber file number of other manager(s)  
 QtrsHeld quarters held (QK™ calculated)  
 QQQSshPrnAmt quarter over quarter change in shares or principal amount of holding (QK™ calculated)  
 QQQValue quarter over quarter change in value of holding (QK™ calculated)  
 QQQPortWgt quarter over quarter change in portfolio weight (QK™ calculated)  
 newOrDel is position 'NEW' or 'DEL'eted. See details. (QK™ calculated)

## Details

Institutional Ownership consists of quarterly '13F-HR' and amended reports '13F-HR/A' made by investors who hold at least \$100 million of securities declared by the U.S. Securities and Exchange Commission. Filers include banks, insurance companies, and hedge funds. The filings are due 45 days after the end of each calendar quarter, and are filed via the EDGAR® system. The securities reported must be from the official '13(f) securities' list published by the SEC. See references section.

QUANTkiosk™ provides access to these filings in two forms at present. The first is an aggregated view that includes one row per unique instrument held. This is described in full in the SG Capital example [sgcap](#). The second version (ex. [deshaw](#)) contains additional submanagers details:

- inclMgrs
- invDiscretion
- votingAuthSole
- votingAuthShared
- votingAuthNone
- otherManager
- otherManagerFileNumber

Additional fields not present in the official '13F-HR' or '13F-HR/A' but provided in both aggregated and non-aggregated views:

- issuerSIC
- issuerSector
- issuerQkid
- issuerTicker

These fields are useful for tracking changes between quarters as well as intrafiling analysis. `otherManager` and `otherManagerName` provides the reported reference number as filed for each entry. Details of this requirement are beyond this help page, but reference the official SEC documentation and rules for clarity. QK™ does not merge submanagers and instead reports the combined submanagers (if reported). For example, a 1;2 would mean the managers 1 and 2 share some aspect of the position. `otherManagerFileNumber` is included to help disambiguate the reported ordering from the actual submanagers reporting. The names for the submanagers can be had using the `meta=TRUE` option in [qk\\_institutional](#).

Additional fields pre-calculated by QUANTkiosk™ across time:

- QOQSshPrnAmt
- QOQValue
- QOQPortWgt
- newOrDel
- QtrsHeld

QK™ calculates these fields as quarter over quarter change in absolute terms. `newOrDel` marks holdings that are 'NEW' this quarter or 'DEL'eted. Deleted entries are not in the filing, but are provided to identify positions traded out of. `QtrsHeld` shows duration of a continuously held position in aggregate, or in the case of submanager API data, positions held continuously by the exact combination of submanagers. The latter is less reliable due to reporting considerations in the source data.

## References

Ownership homepage: '<https://www.quantkiosk.com/ownership>'

Ownership Dashboard: '<https://api.quantkiosk.com/ownership>'

Ownership API: '<https://www.quantkiosk.com/api/ownership>'

D.E. Shaw Filings: '<https://www.sec.gov/edgar/browse/?CIK=0001009207>'

Form 13F-HR FAQ: '<https://www.sec.gov/divisions/investment/13ffaq>'

Official 13(f) Securities '<https://www.sec.gov/divisions/investment/13flists>'

## See Also

R function: [qk\\_institutional](#) Aggregated example: [sgcap](#)

## Examples

```
data(deshaw)
```

---

institutional

*QUANTkiosk™ Ownership API Functions*

---

### **Description**

Query all ownership across firms, individuals and issuers.

### **Usage**

```
qk_institutional(qkid,  
                yyyyqq,  
                qtrs=1,  
                agg = TRUE,  
                wait = 0,  
                quiet = TRUE)
```

```
qk_insider(qkid,  
           yyyyqq,  
           qtrs=1,  
           form = c('insider', 'intent', 'sales'),  
           wait = 1,  
           quiet = TRUE)
```

```
qk_beneficial(qkid,  
              yyyyqq,  
              qtrs=1,  
              form = c('13D13G', '13G', '13D'),  
              wait = 1,  
              quiet = TRUE)
```

```
qk_activist(qkid,  
            yyyyqq,  
            qtrs=1,  
            form = c('13D', '13D13G'),  
            wait = 1,  
            quiet = TRUE)
```

```
qk_holders(qkid,  
           yyyyqq,  
           qtrs=1,  
           agg = TRUE,  
           rollprev = TRUE,  
           wait = 1,  
           quiet = TRUE)
```

**Arguments**

<code>qkid</code>	a <code>qkid</code> object representing the ‘QKID™’ of reporting institution or filer. Use <code>qk_cik</code> , <code>qk_ticker</code> , or similar. See <code>qkid</code> for details.
<code>yyyyqq</code>	a number of the form ‘YYYYQQ’ where ‘YYYY’ is a 4-digit year, and ‘QQ’ is a 2-digit quarter [00,01,02,03,04]. Use in conjunction with <code>qtrs</code> argument to request additional prior quarters in one call. Four digit values will be treated as a full year (i.e. ‘YYYY’) and expanded to YYYY00.
<code>qtrs</code>	number of previous quarters to request (including current <code>yyyyqq</code> ).
<code>form</code>	for <code>qk_beneficial</code> and <code>qk_activist</code> requests, one of ‘13D’ (activist), ‘13G’ (passive), ‘13D13G’ (activist + passive). For <code>qk_insider</code> requests one of ‘insider’ (345), ‘intent’ or ‘sales’ (form 144).
<code>agg</code>	if TRUE, all other managers reporting are rolled up into one record, otherwise filing will contain other managers if filed for as distinct holdings for one or more of the same instruments.
<code>rollprev</code>	if TRUE and requested quarter is latest quarter to file, the previous completed quarter will be used to augment the in-progress filings. Any new filers will override the last known holdings positions, and yet-to-file updates will allow for last known positions to be seen. Setting to FALSE will disable this merge and will only return the (potentially incomplete) quarter being requested.
<code>wait</code>	time in seconds between calls.
<code>quiet</code>	make request silent.

**Details**

QUANTkiosk™ Ownership combines multiple sources of information in an custom formatted `data.frame`. At it’s core, the data is used to understand which participants have control over an entity. These participants file various forms depending on who they are and what their intent may be.

Ownership reporting periods vary based on regulatory rules. Some are quarterly (e.g. Institutional and Funds), whereas many are filed based on events (e.g. Insider, Beneficial/Activist). The arrival of the updates is dependent on filer and SEC rules. All requests are specified for the quarter a filing was made.

To allow for consistent interface, `yyyyqq` is specified as the year ‘yyyy’ and the 2-digit quarter being requested. For example, the second quarter of 2023 would be `yyyyqq=202302`. To request a full year, one can use the special quarter `00`. To request all years use `yyyyqq=0` or `yyyyqq=000000`.

All usage is metered by data requested, e.g. four quarters or one year are equal in credits used.

For ‘Institutional’ (`qk_institutional`) aggregated (`agg=TRUE`) requests, we roll up other managers filed within the main filer’s report to better see total positions and changes. If `agg=FALSE`, other managers are displayed as reported with quarter over quarter change columns reflecting changes in exact reporting lines.

**Value**

A ‘`data.frame`’ of class `qkinstitutional` containing holdings or holders. See example data for fields.

**Institutional**

Institutional data consists of holdings reported by asset managers meeting certain criteria. Covering more than 15,000 managers over the last decade, these are extracted in a point-in-time manner from forms '13F-HR', '13F-NT' and the amended versions of these forms.

**Insider**

Insider ownership is reported through forms '3', '4', and '5'. These are reports filed in duplicate for insiders of a company to describe their ownership rights, including acquisition and disposal of shares. These are filed after a change in ownership.

**Insider Intent**

Insider Intent is a newer form, only required to be electronically filed in the last few years. This is used to indicate the intention to buy or sell, *but not the actual purchase or sale*. These are filed by 'insiders' of a company using form '144'. This is split into 'intent' disclosures, as well as any 'sale' in the 3 months prior to the filing.

**Holders**

The holders data includes all owners of a particular company, allowing the cross sectional institutional holdings in one call. This data is aggregated from all individual reporting firms by quarter and made available as new filings arrive. At present this only contains '13F-HR' reporting, updated as filings arrive, including amendments to previous positions.

**Blockholders / Beneficial / Activist**

Any owner with a position greater than 5% must file under SEC's 'Schedule 13G (SC 13G)' or 'Schedule 13D (SC 13D)'. These are used to indicate control at or exceeding this threshold by one or more parties sharing control of the position.

**Funds**

The largest of all assets under management comes from mutual and closed-end funds that report on form 'NPORT-P'. As opposed to 'Institutional' filers, these represent publicly traded instruments. Reported quarterly.

**Author(s)**

QUANTkiosk™

**References**

SEC's EDGAR® Website: '<https://www.sec.gov/search-filings>'

QK Ownership™: '<https://quantkiosk.com/ownership>'

EDGAR® Form SC 13D, SC 13G FAQ: '<https://www.sec.gov/divisions/investment/13ffaq>'

EDGAR® Form 13F-HR FAQ: '<https://www.sec.gov/divisions/investment/13ffaq>'

EDGAR® Form 3,4,5 FAQ: '<https://www.sec.gov/divisions/investment/13ffaq>'

**See Also**

Small filer example: [sgcap](#)

Large filer example with submanagers: [deshaw](#)

Holders example: [crox](#)

Beneficial Owner example: [pershing](#)

**Examples**

```
# all examples require an API key
## Not run:
citadel <- qk_search_mgr("citadel")
citadel_h<- qk_institutional(citadel, yyyyqq=202301)

# all qtrs of 2023
citadel_h<- qk_institutional(citadel, yyyyqq=202300)

# nvidia's institutional holders for 202501, 202404, 202403, 202402
nvda_h <- qk_holders(qk_ticker("NVDA"), yyyyqq=202501, qtrs=4)

# nvidia's intent to sell 202501, 202404, 202403, 202402
nvda_insider<- qk_insider(qk_ticker("NVDA"), yyyyqq=202501, qtrs=4, form="insider")

# nvidia's intent to sell 202501, 202404, 202403, 202402
nvda_intent <- qk_insider(qk_ticker("NVDA"), yyyyqq=202501, qtrs=4, form="intent")

# nvidia's intent to sell 202501, 202404, 202403, 202402
nvda_sales <- qk_insider(qk_ticker("NVDA"), yyyyqq=202501, qtrs=4, form="sales")

# Restaurant Brands (QSR) block holders for 202501, 202404, 202403, 202402
qsr_b <- qk_beneficial(qk_ticker("QSR"), yyyyqq=2025)

## End(Not run)
```

---

nke

*Nike (NKE) Insider Ownership Data*


---

**Description**

Insider Ownership API example of large firm.

**Usage**

```
nke
```

**Format**

A data frame with 60 observations on the following 40 variables.

acceptanceDatetime EDGAR® processing time  
filing canonical EDGAR® filing path  
form filing type: 3, 3/A (amended), 4, 4/A or 5, 5/A  
is10b50ne indication if transaction was made pursuant to a contract, instruction or written plan  
rptPeriod a character vector  
issuerCik issuer Central Index Key  
issuerName issuer name  
issuerTradingSymbol issuer trading symbol  
issuerQkid issuer QKID™ symbol  
ownerCik insider Central Index Key  
ownerName a character vector  
isDirector is company director  
isOfficer is company officer  
officerTitle officer title  
isTenPct is a ten percent insider  
secTitle security title  
secTitleFootnote footnote for security title  
conversionOrExercisePrice price  
conversionFootnote a character vector  
isTxn is reporting line a transaction  
isDeriv is security a derivative  
txnDate transaction date  
execDate a logical vector  
txnCode transaction code pursuant to Rule 16b-3. See Details.  
txnDesc transaction footnote  
txnAmount transaction amount  
acquiredOrDisposed acquired or disposed  
txnPrice transaction price  
txnValue transaction value  
exerciseDate exercise date  
exerciseDateFootnote exercise date footnote  
expirationDate expiration date  
expirationFootnote expiration footnote  
underlyingSecTitle underlying security  
underlyingShs number of shares of underlying

postTxnShs shares owned post transaction  
 postTxnFootnote post transaction footnote  
 ownershipForm form of ownership  
 ownershipNature nature of ownership  
 ownershipFootnote ownership footnote

## Details

The 'Insider Ownership' data provided by QUANTkiosk™ are gathered from SEC Form 3,4 and 5. The forms are used for initial insider position, changes in position and exit of position, respectively. These forms must be filed before the end of the second business day following the day on which a transaction resulting in a change in beneficial ownership has been executed (see references below). Codes are as described below (direct from SEC)

### General Transaction Codes

- P** - Open market or private purchase of non-derivative or derivative security
- S** - Open market or private sale of non-derivative or derivative security
- V** - Transaction voluntarily reported earlier than required

### Rule 16b-3 Transaction Codes

- A** — Grant, award or other acquisition pursuant to Rule 16b-3(d)
- D** — Disposition to the issuer of issuer equity securities pursuant to Rule 16b-3(e)
- F** — Payment of exercise price or tax liability by delivering or withholding securities incident to the receipt, exercise or vesting of a security issued in accordance with Rule 16b-3
- I** — Discretionary transaction in accordance with Rule 16b-3(f) resulting in acquisition or disposition of issuer securities
- M** — Exercise or conversion of derivative security exempted pursuant to Rule 16b-3

### Derivative Securities Codes (Except for transactions exempted pursuant to Rule 16b3)

- C** — Conversion of derivative security
- E** — Expiration of short derivative position
- H** — Expiration (or cancellation) of long derivative position with value received
- O** — Exercise of out-of-the-money derivative security
- X** — Exercise of in-the-money or at-the-money derivative security

### Other Section 16(b) Exempt Transaction and Small Acquisition Codes (except for Rule 16b-3 codes above)

- C** — Conversion of derivative security
- G** — Bona fide gift
- L** — Small acquisition under Rule 16a-6
- W** — Acquisition or disposition by will or the laws of descent and distribution
- Z** — Deposit into or withdrawal from voting trust

**Other Transaction Codes**

- C** — Conversion of derivative security
- J** — Other acquisition or disposition (describe transaction)
- K** — Transaction in equity swap or instrument with similar characteristics
- U** — Disposition pursuant to a tender of shares in a change of control transaction

**References**

- SEC Investor Bulletin: '<https://www.sec.gov/files/forms-3-4-5.pdf>'
- Form 4 Instructions: '<https://www.sec.gov/about/forms/form4data.pdf>'

**Examples**

data(nke)

---

nvda\_intent

*Nvidia (NVDA) Restricted or Control Shares Intention to Sell*

---

**Description**

Corporate insider and affiliates intention to sell disclosure.

**Usage**

nvda\_intent

**Format**

A data frame with 54 observations on the following 24 variables.

acceptanceDatetime EDGAR® processing time  
 accn internal EDGAR® accession number  
 filedDate date filed in form yyyyymmdd  
 filename canonical EDGAR® filing path  
 form filing type: 144 or 144/A  
 issuerCik issuer Central Index Key  
 issuerName issuer name  
 issuerQkid issuer QKID™ symbol  
 filerCik seller Central Index Key  
 filerName seller name  
 relationshipToIssuer a character vector  
 securitiesClassTitle a character vector

acquiredDateYYYYMMDD the date to be acquired  
 natureOfAcquisitionTransaction nature of acquisition  
 nameOfPersonfromWhomAcquired entity or person acquired from  
 amountOfSecuritiesAcquired amount of securities acquired  
 paymentDateYYYYMMDD a numeric vector  
 natureOfPayment a character vector  
 price the price at acquisition  
 noOfUnitsSold a numeric vector  
 aggregateMarketValue a numeric vector  
 noOfUnitsOutstanding a numeric vector  
 price2 the price of expected sale  
 marketCap market capitalization as reported in USD

### Details

Form 144 is a requirement to disclose the intention to sell restricted shares. It is made up of two different sections:

**Intent** the proposed amount of shares expected to sell `nvda_intent`

**Sales** all sales made over the preceeding three months `nvda_sales`

The intent section of a form is unique across multiple forms filed by a person or entity. The “Sales” section may contain duplicate entries in the data provided by the API. This is intentional as it represents the time(s) the information was disclosed.

From the SEC, the securities and people reporting are:

Restricted securities are securities acquired in unregistered, private sales from the issuing company or from an affiliate of the issuer. Investors typically receive restricted securities through private placement offerings, Regulation D offerings, employee stock benefit plans, as compensation for professional services, or in exchange for providing "seed money" or start-up capital to the company. Rule 144(a)(3) identifies what sales produce restricted securities.

Control securities are those held by an affiliate of the issuing company. An affiliate is a person, such as an executive officer, a director or large shareholder, in a relationship of control with the issuer. Control means the power to direct the management and policies of the company in question, whether through the ownership of voting securities, by contract, or otherwise. If you buy securities from a controlling person or "affiliate," you take restricted securities, even if they were not restricted in the affiliate’s hands.

### References

Form 144 Investor Information: '<https://www.sec.gov/about/reports-publications/investorpubsrule144>'

### Examples

```
data(nvda_sales)
```

---

nvda_sales	<i>Nvidia (NVDA) Restricted or Control Shares Sold</i>
------------	--

---

### Description

Corporate insider and affiliates intention to sell historical sales.

### Usage

nvda\_sales

### Format

A data frame with 386 observations on the following 18 variables.

acceptanceDatetime EDGAR® processing time  
 accn internal EDGAR® accession number  
 filedDate date filed in form yyyyymmdd  
 filename canonical EDGAR® filing path  
 form filing type: 144 or 144/A  
 issuerCik issuer Central Index Key  
 issuerName issuer name  
 issuerQkid issuer QKID™ symbol  
 filerCik seller Central Index Key  
 filerName seller name  
 relationshipToIssuer a character vector  
 sellerName name of seller  
 securitiesClassTitle description of security  
 saleDateYYYYMMDD date shares were sold  
 amountOfSecuritiesSold number of shares sold  
 grossProceeds total proceeds of sale in USD  
 asOf unused  
 price share price in USD

### Details

Form 144 is a requirement to disclose the intention to sell restricted shares. It is made up of two different sections:

**Intent** the proposed amount of shares expected to sell nvda\_intent

**Sales** all sales made over the preceeding three months nvda\_sales

The intent section of a form is unique across multiple forms filed by a person or entity. The "Sales" section may contain duplicate entries in the data provided by the API. This is intentional as it represents the time(s) the information was disclosed.

From the SEC, the securities and people reporting are:

Restricted securities are securities acquired in unregistered, private sales from the issuing company or from an affiliate of the issuer. Investors typically receive restricted securities through private placement offerings, Regulation D offerings, employee stock benefit plans, as compensation for professional services, or in exchange for providing "seed money" or start-up capital to the company. Rule 144(a)(3) identifies what sales produce restricted securities.

Control securities are those held by an affiliate of the issuing company. An affiliate is a person, such as an executive officer, a director or large shareholder, in a relationship of control with the issuer. Control means the power to direct the management and policies of the company in question, whether through the ownership of voting securities, by contract, or otherwise. If you buy securities from a controlling person or "affiliate," you take restricted securities, even if they were not restricted in the affiliate's hands.

## References

Form 144 Investor Information: '<https://www.sec.gov/about/reports-publications/investorpubsrule144>'

## Examples

```
data(nvda_sales)
```

---

pershing

*Pershing Square Beneficial and Activist Details*

---

## Description

Beneficial and Activist API example of single manager block positions for 2019-2020

## Usage

```
data("pershing")
```

## Format

A data frame with 72 observations on the following 25 variables.

acceptanceDatetime acceptance time to SEC's EDGAR® system

filing canonical EDGAR® filing path

form filing type: SC 13D, SC 13G, SC 13D/A or SC 13G/A

filedAsOf when the data was filed

dateOfEvent date reporting for

issuerName name of issuer in submission

issuerCik Central Index Key of issuer  
issuerQkid QKID™ symbol  
issuerTicker common exchange ticker  
filerName name of reporting filer  
filerCik Central Index Key of filer  
rule13d13g rule being reported for  
namesOfRptPersons individual or firm name who is reporting  
isGrp a character vector  
srcOfFunds a character vector  
srcOfFundsDesc a character vector  
placeOfOrg a character vector  
soleVoting a numeric vector  
sharedVoting a numeric vector  
soleDispositoryPwr a numeric vector  
sharedDispositoryPwr a numeric vector  
aggAmtOwned a numeric vector  
pctOfClass a numeric vector  
personType a character vector  
personTypeDesc a character vector

## Details

Beneficial and Activist Ownership describe owners (reporting) who maintain a large share of a public company (issuer). The forms filed when a filer maintains or exceeds a 5% are ‘SC 13G’ and ‘SC 13D’, and the follow-on amendments as those positions change.

The difference in form types is related to filer *intent*, specifically whether the 5% owner is passive, or is attempting to exert control over the company. The canonical example of a large investor who may file both is ‘Pershing Square’, run by ‘Bill Ackman’. We include this dataset to document the fields. Additional history is available for all filings of this type as well as for all history.

Through 2024, all filings have come as unstructured text and as such are very difficult to systematically extract data. QUANTkiosk™ runs a complex automated extraction process to provide reliable data in a form that is made available in R via `qk_beneficial` and `qk_activist` functions.

## References

Ownership homepage: ‘<https://www.quantkiosk.com/ownership>’

Pershing Square Filings: ‘<https://www.sec.gov/edgar/browse/?CIK=0001336528>’

Form SC 13D/G information: ‘<https://www.sec.gov/rules-regulations/staff-guidance/compliance-disclosure-interpretations/exchange-act-sections-13d-13g-regulation-13d-g-beneficial-ownership-reporting>’

**Examples**

```

str(pershing)

## Not run:
pershing.cik <- "0001336528"

qk_beneficial(pershing.cik, yyyy=c(2019,2020), qq=0)

## End(Not run)

```

---

pfe

*Pfizer (PFE) Revenue Data*


---

**Description**

QUANTkiosk™ Fundamentals API (As Of)

**Usage**

```
data("pfe")
```

**Format**

A data frame with 60 observations on the following 40 variables.

`cik` the Central Index Key of the issuer

`pik` the QKID™ Permanent Index Key of the issuer

`acceptance_time` EDGAR® processing time

`acceptance_utc` EDGAR® processing time in unix (seconds since 19700101)

`stmt` statement including the item

`item` the QK™ standardized item code

`unit` unit of measurement - as reported

`form` form filing type: 10-Q, 10-Q/A, 10-K, 10-K/A, 8-K, 8-K/A, 20-F, 20-F/A, 6-K, 6-K/A

`filename` canonical EDGAR® filing path

`accn` EDGAR® accession number

`fye` fiscal year end

`fyeq` fiscal yeat end quarter

`fpb` fiscal period beginning

`fpe` fiscal period end

`filed` date filed

`fpe2filed` days from fiscal period end to filed

`filed40` forty day mark from fpe

ffiled first filed - will be different in a restatement  
cyqtr calendar year quarter available  
cyear calendar year available  
cqtr calendar quarter available  
rptq value - fiscal quarter (reported)  
rptqd reporting quarter days  
rpty value - fiscal year to date (reported)  
rptyd reporting year days  
fp fiscal period - e.g. Q1, Q2, Q3, Q4, FY  
fqtr fiscal quarter - e.g. 1, 2, 3, 4  
fqd fiscal quarter days  
fq value - calculated fiscal quarter  
fytd value - calculated fiscal year to date  
ttm value - calculated trailing twelve months  
rstmt restated flag  
rstmt.q restated flag - quarterly value  
rstmt.y restated flag - yearly value  
iq imputed quarterly  
asof as of date  
concept\_id unique id for auditing  
fqpy fiscal quarter - prior year  
fytdpy fiscal year to day - prior year  
ann annual value - only fye

### Details

QUANTkiosk™ Fundamentals are extracted from original sources, using a systematic process. Data is extracted and normalized into QK™ concepts that align across time and firms using a set of rules. Most concepts are currently using 'US-GAAP' taxonomy.

### Source

QUANTkiosk™ '<https://www.quantkiosk.com/fundamentals>'

### Examples

to\_df(pfe)

---

qkid

*QKID™ Tools*


---

## Description

Functions to create, extract and convert entity and instrument identifiers within QUANTkiosk™'s QKID™ open symbology.

## Usage

```

qk_search(x, type=c('issuer','manager','fund','person'), n=10)
qk_search_co(x, n=10)
qk_search_mgr(x, n=10)

qk_ticker(ticker, ...)
to_ticker(qkid, ...)

qk_figi(figi, type = c("figi", "shareClass", "composite"), ...)
to_figi(qkid, type = c("figi", "shareClass", "composite"), ...)

qk_cik(cik, ...)
to_cik(qkid, ...)

qk_permid(permid, type = c("org", "instrument", "quote"), ...)
to_permid(qkid, type = c("org", "instrument", "quote"), ...)

qk_name(name, ...)
to_name(qkid, ...)

qk_sic(sic, ...)
to_sic(qkid, ...)

qk_sector(sector, ...)
to_sector(qkid, ...)

# convert string version of QKID to class `qkid`
qkid(qkid, src="qkid", srcid=qkid, retrieved=yyyymmdd())

is.qkid(x)
as.qkid(x)

.qkidVersion(qkid)
classname(qkid)
detail(qkid)

entity(qkid)
cls(qkid)

```

```
instrument(qkid)
```

### Arguments

x	object to convert or test, or name to search
qkid	qkid classed object or one that can be converted to.
cik	a string representing a CIK (Central Index Key)
permid	a string representing a PermID
ticker	a string representing a ticker
figi	a string representing a FIGI
name	a string representing a name
sic	Standard Industrial Classification (SIC) code
sector	QK™ Sector (see below)
...	unused
type	optional conversion specifics, or one of 'issuer' or 'fund' in qk_search_co or qk_search_mgr, respectively.
src	source used in construction (e.g. qk_ticker("AAPL") => 'ticker')
srcid	value used in construction (e.g. qk_ticker("AAPL") => 'AAPL')
retrieved	date of retrieved (or created) qkid
n	number of search matches to return

### Details

R functions to allow for mapping and manipulation of QUANTkiosk™'s symbology as well as common identifiers using a special qkid class.

### Value

QUANTkiosk™'s public identifier, known as 'QKID™' is the central identifier used by the QK™ API. It is freely licensed under CC-BY-SA and is designed to provide institutional quality symbology usable within professional asset management while being simple to use.

For a full discussion, please refer to official website below and the associated documentation. The 'QKID™' is a portmanteau identifier, combining well-established entity and instrument identifiers into a linked symbology suitable for research and trading. There are three main components to a fixed-width 'QKID™':

'QKID™' can also be mapped to sectors and SIC codes.

- ENTITY.CLS.INSTRUMENT
  - ENTITY: 10 characters uniquely matching an entity
  - CLS: 4 character code indicating the instrument class
  - INSTRUMENT: a unique, immutable instrument ID

'cls' and 'detail' provide access to qkid object internals and details, returning broken-down identifiers or meta details about the id.

To facilitate discovery, **qkiosk** provides search functionality. `qk_search_co` offers fuzzy matching to public companies (e.g. Pfizer or McDonalds), returning a menu to select the match from. The return value is the matched 'QKID'. Similar functionality is available to find investment managers (e.g. D.E Shaw) via the `qk_search_mgr` function.

### Note

Point-in-time QKID™ queries are currently not available outside of a subscription, this may change in the future.

### Author(s)

QUANTkiosk™

### References

Official QKID™ site: '<https://www.quantkiosk.com/qkid>'

### Examples

```
# QKID™ string to class qkid
qkid("0000200406.0000.001S5SHQ9")

## Not run:
qk_search_co("tesla")
qk_search_mgr("pershing")

jnj.qkid <- qk_ticker("JNJ")
to_ticker(jnj.qkid)
to_cik(jnj.qkid)

detail(jnj.qkid)

faang <- qk_ticker(c("META", "AAPL", "AMZN", "NFLX", "GOOGL"))
entity(faang)
cls(faang)
instrument(faang)

cls(faang)

to_ticker(faang)
to_name(faang)
to_permid(faang)
to_fig1(faang)
to_cik(faang)

## End(Not run)
```

---

qk\_audit                      *QUANTkiosk Data Auditing Tools*

---

## Description

Methods to audit original data sources to verify data correctness and interpretation.

## Usage

```
qk_audit(x, ...)

## Default S3 method:
qk_audit(x, row, accn, fpe, open = FALSE, ctx=-1, ...)
```

## Arguments

x	data.frame to audit
row	row of data.frame to display source
accn	optional accession number (qk_fn)
fpe	optional fiscal period end (qk_fn)
open	should browser window be opened to original source page
ctx	limit display of matching data to a smaller context window. defaults to full record.
...	unused

## Details

Non-market data is derived from myriad sources and contain billions of datum. To better prove correctness (and to track data issues), QUANTkiosk provides a user interface to interrogate the original sources in a variety of ways.

The first application is for the fundamentals data we curate from billions of datum published by companies. The qk\_audit interface allows the researcher to request the source data - *in context* from the original filings, if applicable.

For most of the standardized financial reporting line items (GAAP), we have developed item codes to standardize reporting views when possible. These data are coalesced from multiple places within filings including tabular data and the xbrl (extensible business reporting language) mandated in the US and in other countries for many instances of reporting.

qk\_audit is designed to be used regularly to inspect context as well as numerical correctness of data returned by QUANTkiosk's APIs by using extracted data from the original HTML filings. These original tables do not include the additional contextual details present in the qk\_fn data - often only presenting a row label and a set of period to date values. We process and extract the additional 30+ fields from a complex internal process that includes validation steps as well as the very facility to inspect as presented in qk\_audit.

**Value**

A displayed version of the text-formatted original html tables, including context we are assigning and a highlighted section of the html that matches the data in question.

Some values may we return in the API are actually imputed from the data that may actually only report data in a period-to-date format.

**Note**

This functionality is not all inclusive as locating data within a filings is not one for one. Often data can be presented outside of statements or tables and therefore has no easy to display data source. This may be possible in future version fo QK.

**Author(s)**

QUANTkiosk

**References**

'www.sec.gov'

**See Also**

See Also as [qk\\_fn](#)

**Examples**

```
## Not run:
jnj <- qk_fn(qk_ticker("JNJ"), "SALE")

# pipes require R >= 4.1.0
# jnj |> to_df() |> qk_audit(55)

## End(Not run)
```

---

qk\_complete

*Live Download EDGAR® Filings Raw & Processed Data*

---

**Description**

Provide access to QUANTkiosk™ *QK Complete*™ professional subscription. This function is intended to be used as part of an ETL pipeline and run at fixed intervals to provide local live capture of filings data.

**Usage**

```
qk_complete(dir,  
            subscription = "raw",  
            rollup = "5m",  
            last = "5m",  
            date = today(),  
            fmt = c("zip", "tar.gz"),  
            gzip = TRUE,  
            hide = TRUE,  
            quiet = FALSE,  
            force = FALSE)
```

**Arguments**

dir	Directory to use for raw filings. Will be created if needed.
subscription	Subscription type varies with access. 'raw' retrieves all '.txt' filings submitted to the EDGAR® system.
rollup	Window of time for which new filings are provided.
last	Lookback window to query for rollup archives.
date	SEC date to query (America/New_York)
fmt	Return archive type. Default is 'zip' format which contains uncompressed ('gzip') raw text filings.
gzip	Should files be compressed for local storage.
hide	Hide API key in request if quiet=TRUE.
quiet	Hide request from output.
force	Overwrite files if already downloaded.

**Details**

qk\_complete syncs live data subscriptions in near realtime. For most applications this is sufficient to maintain a full history locally while the filings are arriving and being processed by the SEC.

**Value**

Called for its side-effects, the function returns a list of filings that have been extracted from the archive. The primary result is the writing of the raw (or processed) filings to disk, as well as associated meta data created by the api.

**Note**

This endpoint requires both historical and live access. Consult your account page for details.

**Author(s)**

QUANTkiosk™

## References

SEC's EDGAR® Website: 'https://www.sec.gov/search-filings'

## Examples

```
## Not run:
edgadir <- tempdir()
qk_complete(edgadir)

dir(edgadir)

## End(Not run)
```

---

qk\_filter

*QK Object Manipulation*

---

## Description

'generic' functions to filter and sort data returned from the QK API. These are helper functions designed to facilitate exploration of specific data structures provided by the API.

## Usage

```
qk_filter(x, ...)

## S3 method for class 'qk_df'
qk_filter(x, by = c("top", "incr", "decr", "new", "del"), ...)

qk_sort(x, ...)
## S3 method for class 'qk_df'
qk_sort(x, by = c("value", "shrsOrPrnAmtType", "portWgt",
                 "QtrsHeld", "qtrsHeld", "QQQsshPrnAmt",
                 "QQQValue", "QQQPortWgt"), incr = TRUE, ...)

qk_summary(x, ...)
## S3 method for class 'qk_df'
qk_summary(x, n = c(10, 5), ...)
```

## Arguments

x	R object
by	for qk_sort the column to sort on. For qk_filter, selection of rows matching description. See Details.
incr	sort in numeric increasing order. Set FALSE to order largest negative values.
n	number of elements in tabular summary.
...	unused by current methods.

## Details

**qkiosk** makes available multiple data sets from the *quantkiosk* platform. These are often information dense and require further investigation. To help facilitate and align the experience across supported tools (e.g. dashboard, R, python), a common set of basic filtering is provided for convenience.

For ‘Institutional Ownership’ data returned from `qk_institutional`

See [deshaw](#) and [sgcap](#) for examples of data.

## Value

filtered and sorted versions of original data.

## Author(s)

QUANTkiosk

## References

See ‘<https://api.quantkiosk.com/ownership>’ dashboard examples

## See Also

See Also as [qk\\_institutional](#), ~~~

## Examples

```
# SG Capital QKID using CIK
sg <- qk_cik(1510099)

# sgcap is available as a dataset in package
sgcap <- qk_institutional(sg, yyyyqq=202401)

head(qk_filter(sgcap, by='incr'))
head(qk_sort(sgcap, by='QtrsHeld'))
head(qk_sort(qk_filter(sgcap, by='decr'), by='QQQValue', incr=FALSE))

qk_summary(sgcap)
```

qk\_fn

*Fundamentals Data***Description**

Functions to get ‘as-reported’ and ‘revised’ fundamentals line item data from QK™/Financials API.

**Usage**

```
qk_fn(qkids,
      items,
      qkid_items = NULL,
      from = 20000101,
      to = today(),
      asof = today(),
      asfiled = FALSE,
      aspit = getOption("qk.aspit",FALSE),
      ticker = TRUE,
      hide = TRUE,
      quiet = TRUE,
      cache = TRUE)
```

```
qk_fncodes()
```

```
## S3 method for class 'qk_fn'
qk_select(x, id_item, id, item, i, j, ...)
```

```
qkiditems(qkids,items,using=TRUE)
```

```
pit_asof(pit,dt = today(), qtrs=1)
```

```
pit_asfiled(pit, dt = today(), qtrs=1)
```

**Arguments**

qkids	a qkid vector representing the ‘QKID™’ of reporting institution or filer. Use qk_cik, qk_ticker, or similar. See qkid for details.
items	a vector or list of vectors containing QUANTkiosk™ item codes (e.g. SALE, NI, AT, ATC) corresponding to US-GAAP, DEI, or other line item(s). See qk_fncodes()
qkid_items	an object of class qkid_item created via qkiditems. if specified, will ignore qkids and items. If qkid_items=NULL (default) qkids and items will be converted into a corresponding qkid_object.
from	start date of returned series.
to	end date of returned series. expresses as an integer or yyyyymmdd date object.

asof	a number in form of YYYYMMDD. return last known values (incl. restated) for all periods up to 'asof' date. See details for more information on subscription limits.
asfiled	return as-filed values from original report (no restatements).
aspit	requests full point-in-time table for historical dates. ONLY AVAILABLE TO ENTERPRISE. By default this is attempted once and if not enabled either the <i>latest</i> point-in-time or as-filed data returned depending on asof or asfiled argument values.
ticker	should column names use tickers
hide	hide API Key from verbose (quiet=FALSE) output.
quiet	control verbosity.
cache	defaults to TRUE
pit	qkid-item timeseries from qk_fn(..., aspit=TRUE) call.
dt	date (yyyymmdd) used for point-in-time calculation. This will be converted using as.yyyymmdd.
qtrs	number of quarters to extract
x	an object of qk_fn
...	additional arguments if applicable
id_item	a vector of id-items in form 'TICKER.ITEM' to extract data.frame from qk_fn object.
id	the ticker of the entity for extraction in qk_select. See id_item argument
item	a vector or list of vectors containing QUANTkiosk™ item codes (e.g. SALE, NI, AT, ATC) corresponding to US-GAAP, DEI, or other line item(s). See qk_fncodes()
using	internal flag to indicate input form.
i	extract rows from qk_select call.
j	extract colums from qk_select call.

## Details

To view current QUANTkiosk™ item codes call qk\_fncodes(). This will return a list organized by supported statements. This is constantly expanding.

For each item in items requested a request applied to every qkid in qkids. All responses are cached by default. This can be disabled using cache=FALSE.

For enterprise subscriptions, if view='pit' is requested the subsequent object may contain restated and as-filed values and times. Two functions are provided to resolve to unique observations at each date: pitAsFiled converts the series to only include the initial observation recorded, whereas pitAsOf reconciles restatements up to and including the date specified.

**Value**

A multivariate xts timeseries if full=FALSE, containing one column for each qkid, item pair. The column names are derived from the QKID metadata. See examples for more details.

If full=TRUE a nested-list of data.frames are returned with additional details for each item value. See pfe. sale sample data. The general object looks like:

- qkid (e.g. "0001045810.000.001S5TZJ6" [NVDA])
  - sale (xts)
  - eps (xts)
  - atc (xts)
- qkid (e.g. "0001564408.000.00441QMK5" [SNAP])
  - sale (xts)
  - eps (xts)
  - atc (xts)

**Note**

Depending on a user's subscription level, there may be restrictions on the universe of available companies and available line items. For asof queries, the the requests will resolve to the date of the query unless the subscription is for arbitrary point-in-time data. See 'https://quantkiosk.com/point-in-time' for a full discussion of the details.

**Author(s)**

QUANTkiosk™ team.

**References**

SEC EDGAR® filing and reporting rules.

**See Also**

See Also [qkid](#) See Also [qk\\_fn](#)

**Examples**

```
## Not run:
# get list of all QK™ codes
fncodes <- qk_fncodes()

# Pfizer and J&J quarterly revenue (SALE) and net income (NI)
pfe <- qk_fn(qk_ticker(c("PFE","JNJ")), c("SALE","NI"))

tail( to_df(pfe) )
# single company, single item - Net Income
qkiditems(qk_ticker("AMD"), "NI")

# single company, multiple items - Revenue + Net Income
```

```

qkiditems(qk_ticker("AMD"), c("SALE","NI"))

# multiple companies, single item (used for each companies)
qkiditems(qk_ticker(c("AMD", "AAPL")), "NI")

# multiple companies, multiple items (used for each companies) - Assets + Assets Current
qkiditems(qk_ticker(c("AMD", "AAPL")), c("AT", "ATC"))

# multiple companies, multiple differnt items for each
qkiditems(qk_ticker(c("AMD", "AAPL")), list("NI",c("AT","ATC")))

## End(Not run)

```

---

qk\_select

---

*Convert and Display QUANTkiosk Objects*


---

## Description

Generic functions to extract, transform and display QUANTkiosk api data to common R objects.

## Usage

```

qk_select(x, ...)

to_df(x, ...)
as.qk_df(x, view="", showfull=FALSE, cls="qk_df", highlight=NULL)

to_ts(x, ...)
## S3 method for class 'qk_fn'
to_ts(x, i='fq', dt='fpe', ...)
## S3 method for class 'qk_df'
to_ts(x, i='fq', dt='fpe', ...)

full(x, showfull=TRUE, ...)
## S3 method for class 'qk_fn'
full(x, showfull=TRUE, ...)
## S3 method for class 'qk_df'
full(x, showfull=TRUE, ...)

## S3 method for class 'qk_fn'
subset(x, ...)
## S3 method for class 'qk_fn'
as.data.frame(x, ...)

## S3 method for class 'qk_df'
subset(x, ...)
## S3 method for class 'qk_df'
head(x, ...)

```

```
## S3 method for class 'qk_df'
tail(x, ...)

highlight(x, ...)
## S3 method for class 'data.frame'
highlight(x, i, color='yellow', bg, fg, ...)
```

### Arguments

x	Object to transform. These are dispatched to object specific methods when appropriate.
view	internal view represented for use in pit functions
showfull	Display all hidden columns.
highlight	internal use
i	Row selection
dt	Column to use for indexing by time (to_ts)
color	background color for highlighting
bg	background color for highlighting. color names or ansi 256 colors.
fg	foreground color for highlighting. color names or ansi 256 colors.
cls	additional classes to add to conversion
...	Additional arguments depending on object class.

### Details

Most data fetched from QUANTkiosk results in either a *QK* typed object or a `data.frame` of class `qk_df`.

Central to manipulation of these data, the package provides a variety of s3 methods to interact with **base** or **stats** functionality.

### Value

A modified or transformed object

### Examples

```
head(crox)

highlight(crox, 2:3)

## Not run:
# R >= 4.1.0
# crox |> highlight(2) |> highlight(3, 'green')

## End(Not run)
```

---

qk_univ	<i>Universe Function</i>
---------	--------------------------

---

**Description**

Tools to Fetch Universe Data

**Usage**

```
qk_univ(univ, dt, src = "QK", cache=TRUE)
```

**Arguments**

univ	name of universe
dt	date for universe in form yyyyymmdd. NOT IMPLEMENTED.
src	source of universe - 'QK' or local file path. NOT IMPLEMENTED.
cache	should data come from cache if available

**Details**

The QK universe function allows for named universe requests. Each universe is constructed using a set of rules.

**Value**

A qkid object containing the universe.

**Note**

Neither dt= or src= are implemented in this version.

**Author(s)**

QUANTkiosk™ team.

**References**

'<https://quantkiosk.com/qkid>'

**See Also**

See Also [qkid](#)

**Examples**

```
## Not run:
qk100 <- qk_univ("QK100")

# top 1000 widely firms
qk1k <- qk_univ("QK1000")

# next 2000 most widely held firms
qk2k <- qk_univ("QK2000")

## End(Not run)
```

---

sgcap

*SG Capital Institutional Ownership Details (Aggregated)*


---

**Description**

Institutional Ownership API example of small manager filing.

**Usage**

```
sgcap
```

**Format**

A data frame with 76 observations on the following 22 variables.

filerName name of filer (i.e. fund name)  
filing canonical EDGAR® filing path  
submissionType filing type: 13F-HR or 13F-HR/A (amended)  
reportPeriod period of report  
filedDate when the data was filed  
issuer name of instrument  
titleOfClass title or class name of instrument  
issuerSIC official standardized industrial code  
issuerSector two-character sector code from QUANTkiosk™  
issuerTicker common exchange ticker  
issuerQkid QKID™ symbol  
value fair market value of position at end of report period  
shrsOrPrnAmt number of shares held or principal amount  
putCall one of 'PUT', 'CALL' or empty  
shrsOrPrnAmtType shares 'SH' or principal 'PRN'

portWgt portfolio weight (QK™ calculated)  
 hasOtherManager logical value indicating if submanagers are reported  
 QtrsHeld quarters held (QK™ calculated)  
 QOQSshPrnAmt quarter over quarter change in shares or principal amount of holding (QK™ calculated)  
 QOQValue quarter over quarter change in value of holding (QK™ calculated)  
 QOQPortWgt quarter over quarter change in portfolio weight (QK™ calculated)  
 newOrDel is position 'NEW' or 'DEL'eted. See details. (QK™ calculated)

## Details

Institutional Ownership consists of quarterly '13F-HR' and amended reports '13F-HR/A' made by investors who hold at least \$100 million of securities declared by the U.S. Securities and Exchange Commission. Filers include banks, insurance companies, and hedge funds. The filings are due 45 days after the end of each calendar quarter, and are filed via the EDGAR® system. The securities reported must be from the official '13(f) securities' list published by the SEC. See references section.

QUANTkiosk™ provides access to these filings in two forms at present. The first is an aggregated view that includes one row per unique instrument held. The second version (ex. deshaw) contains additional submanagers details. See the respective help page.

Additional fields not present in the official '13F-HR' or '13F-HR/A' but provided in both aggregated and non-aggregated views:

- issuerSIC
- issuerSector
- issuerQkid
- issuerTicker

These fields are useful for tracking changes between quarters as well as intrafiling analysis.

Note that hasOtherManager is set to TRUE or FALSE if the filing reports other manager holdings. See deshaw for more details on additional fields in non-aggregated views

Additional fields pre-calculated by QUANTkiosk™ across time:

- QOQSshPrnAmt
- QOQValue
- QOQPortWgt
- newOrDel
- QtrsHeld

QK™ calculates these fields as quarter over quarter change in absolute terms. newOrDel marks holdings that are 'NEW' this quarter or 'DEL'eted. Deleted entries are not in the filing, but are provided to identify positions traded out of. QtrsHeld shows duration of a continuously held position in aggregate, or in the case of submanager API data, positions held continuously by the exact combination of submanagers. The latter is less reliable due to reporting considerations in the source data.

**References**

Ownership homepage: '<https://www.quantkiosk.com/ownership>'  
 Ownership Dashboard: '<https://one.quantkiosk.com/ownership>'  
 SG Capital Filings '<https://www.sec.gov/edgar/browse/?CIK=0001510099>'  
 Form 13F-HR FAQ: '<https://www.sec.gov/divisions/investment/13ffaq>'  
 Official 13(f) Securities '<https://www.sec.gov/divisions/investment/13flists>'

**See Also**

R function: `qk_institutional` Non-aggregated (Submanager) example: `deshaw`

**Examples**

```
data(sgcap)
```

---

```
yyyyymmdd
```

```
Simple Dates
```

---

**Description**

Simplified dates expressed as integers to facilitate easy API access.

**Usage**

```
yyyyymmdd(x = Sys.time(), tz = Sys.getenv("TZ"))

today()

to_qq/yyyyymmdd)
to_yyyy/yyyyymmdd)
to_yyyyqq/yyyyymmdd)

qtrs(n)
days(n)

## S3 method for class 'yyyyymmdd'
seq(from, to, by, length.out = NULL, along.with = NULL, ...)

## S3 method for class 'yyyyymmdd'
diff(x, lag = 1, differences = 1, ...)

is.yyyyymmdd(x)

as.yyyyymmdd(x, ...)

## S3 method for class 'Date'
```

```

as.yyyymmdd(x, ...)
## S3 method for class 'numeric'
as.yyyymmdd(x, ...)

## S3 method for class 'yyymmdd'
as.Date(x, ...)
## S3 method for class 'yyymmdd'
as.POSIXct(x, ...)
## S3 method for class 'yyymmdd'
as.POSIXlt(x, ...)

```

### Arguments

x	R object
yyymmdd	an 8-digit date
tz	time zone to use internally.
n	integer value to offset - may be positive or negative
from	starting date. Required
to	end date. Optional.
by	increment of the sequence. Optional. See ‘Details’.
length.out	integer, optional. Desired length of the sequence.
along.with	take the length from the length of this argument.
lag	an integer indicating which lag to use.
differences	an integer indicating the order of the difference.
...	arguments passed to or from other method.

### Details

R has a wealth of date functionality but lacks a coherent integer date representation that is capable of date math and proper timezone handling. This set of tools provides this.

### Value

TBD

### Author(s)

QUANTkiosk

### References

Most date functionality is provided by conversion to R’s Date internally and cast back to a yyymmdd before returning. See [Date](#) and [seq.Date](#) for more details.

### See Also

See also [today](#)

**Examples**

```
# today - no TZ
today()
is.yyyymmdd(today())

# same output as today() but possible to change TZ
yyyyymmdd()

# sequence
seq(yyyyymmdd(), yyyyymmdd() + 10)

seq(yyyyymmdd(), by='month', length.out=10)
seq(yyyyymmdd(), by='month', along.with=1:5)

# difference between dates
diff(yyyyymmdd()+c(1:5,14:20), lag = 1, differences = 1)

# add durations
yyyyymmdd() + 10
yyyyymmdd() + qtrs(2)

# subtract durations
yyyyymmdd() + qtrs(-2)
yyyyymmdd() - qtrs(2)

# convert to yyyyymmdd
as.yyyymmdd(Sys.Date())
as.yyyymmdd(20240124)

# convert back to R classes
as.Date(yyyyymmdd())
as.POSIXct(yyyyymmdd())
```

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