

Package ‘GetDFPData2’

July 21, 2025

Title Reading Annual and Quarterly Financial Reports from B3

Version 0.6.3

Description

Reads annual and quarterly financial reports from companies traded at B3, the Brazilian exchange
<<https://www.b3.com.br/>>.

All data is downloaded and imported from CVM's public ftp site <https://dados.cvm.gov.br/dados/CIA_ABERTA/>.

Depends R (>= 3.5.0)

Imports stringr, xml2, dplyr, readr, lubridate, magrittr, purrr,
memoise, rvest, tidyr, RCurl, shiny, writexl, stats

ByteCompile true

License GPL-2

BugReports <https://github.com/msperlin/GetDFPData2/issues/>

URL <https://github.com/msperlin/GetDFPData2/>

RoxygenNote 7.2.3

Suggests knitr, rmarkdown, testthat (>= 3.0.0), ggplot2, covr, fs

VignetteBuilder knitr

Config/testthat/edition 3

NeedsCompilation no

Author Marcelo Perlin [aut, cre],
Guilherme Kirch [aut]

Maintainer Marcelo Perlin <marceloperlin@gmail.com>

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export_xlsx	<i>Export DFP/ITR data to a xlsx file</i>
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Description

Export DFP/ITR data to a xlsx file

Usage

```
export_xlsx(l_dfp, f_xlsx = "GetDFPData-XLSX.xlsx")
```

Arguments

<code>l_dfp</code>	A list from <code>get_dfp_data</code> or <code>get_itr_data</code>
<code>f_xlsx</code>	Path to xlsx file

Value

A dataframe with several information about B3 companies

Examples

```
## Not run: # keep cran check fast
df_info <- get_info_companies()
str(df_info)

## End(Not run)
```

get_dfp_data	<i>Downloads and reads DFP datasets</i>
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Description

The DFP (demonstrativos financeiros padronizados) is the annual reporting system of companies traded at B3. This function will access the CVM ftp and parse all available files according to user choices

Usage

```
get_dfp_data(
  companies_cvm_codes = NULL,
  first_year = 2010,
  last_year = lubridate::year(Sys.Date()),
  type_docs = c("BPA", "BPP", "DRE"),
  type_format = c("con", "ind"),
  clean_data = TRUE,
  use_memoise = FALSE,
  cache_folder = "gdfpd2_cache",
  do_shiny_progress = FALSE
)
```

Arguments

<code>companies_cvm_codes</code>	Numeric CVM code of companies. IF set to NULL (default), will return data for all available companies.
<code>first_year</code>	First year of selected data
<code>last_year</code>	Last year of selected data
<code>type_docs</code>	Type of financial documents. E.g. <code>c('DRE', 'BPA')</code> . Definitions: '*' = fetch all docs, 'BPA' = Assets (ativos), 'BPP' = Liabilities (passivo), 'DRE' = income statement (demonstrativo de resultados), 'DFC_MD' = cash flow by direct method (fluxo de caixa pelo metodo direto), 'DFC_MI' = cash flow by indirect method (fluxo de caixa pelo metodo indireto), 'DMPL' = statement of changes in equity (mutacoes do patrimonio liquido), 'DVA' = value added report (desmonstrativo de valor agregado)
<code>type_format</code>	Type of format of document (con = consolidated, ind = individual). Default = <code>c('con', 'ind')</code>
<code>clean_data</code>	Clean data or return raw data? See <code>read_dfplitr_csv()</code> for details
<code>use_memoise</code>	Use memoise caching? If no (default), the function will read all .csv files. If yes, will use package memoise for caching results (execution speed increases significantly)
<code>cache_folder</code>	Path of cache folder to keep memoise and zip files
<code>do_shiny_progress</code>	Whether to use shiny progress indicator (default = FALSE)

Value

A list of tibbles containing all requested financial data. Each element of the list is a table from DFP.

Examples

```
## Not run:
df_dfp <- get_dfp_data(companies_cvm_codes = NULL)

## End(Not run)
```

get_info_companies	Returns a up to date table with information about B3 companies
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Description

Imports a dataset from cvm <<https://dados.cvm.gov.br/>>, containing up to date information about companies, active or not.

Usage

```
get_info_companies(cache_folder = "gdfpd2_cache")
```

Arguments

cache_folder Path of cache folder to keep memoise and zip files

Value

A dataframe with information about available companies in the database

Examples

```
## Not run: # keep cran check fast
df_info <- get_info_companies()
str(df_info)

## End(Not run)
```

search_company	Helps users search for a company
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Description

Helps users search for a company

Usage

```
search_company(char_to_search, cache_folder = "gdfpd2_cache")
```

Arguments

char_to_search Character for partial matching
cache_folder Path of cache folder to keep memoise and zip files

Value

A dataframe with information about available companies in the CVM database

Examples

```
## Not run: # dontrun: keep cran check fast
df <- search_company('petrobras')

## End(Not run)
```

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