Our Company

- **41+** YEARS OF GROWTH
- **90%** CLIENT RETENTION
- **155K** GLOBAL USERS
- **48** OFFICES IN 22 COUNTRIES
SOLVE OUR CLIENTS’ GREATEST CHALLENGES WITH THE POWER OF COLLABORATION
Industry Awards

**BEST MARKET DATA PROVIDER**
Inside Market Data and Inside Reference Data Awards

**BEST OVERALL TECHNOLOGY PROVIDER**
Buy-Side Technology Award
Inside Market Data and Inside Reference Data Awards

**BEST DATA ANALYTICS PROVIDER**
Inside Market Data and Inside Reference Data Awards

**BEST CLIENT SERVICE SOLUTION**
News Technology Innovation Awards

**BEST RESEARCH PROVIDER**
Inside Market Data and Inside Reference Data Awards
History of Innovation

The evolution of FactSet’s product lines to continue to expand solutions and meet market demands over time.

1978
**DATA + RESEARCH**
- FactSet begins to deliver content
- Data Downloading
- Consultative Support Model
- Universal Screening
- Alpha Testing
- Portfolio Analysis Workstation

1997
**ANALYTICS + APPLICATIONS**
- SPAR
- FactSet Ownership
- Marquee
- JCF Estimates
- Fixed Income Attribution
- Fixed Income Analytics

2014
**WORKFLOW SOLUTIONS**
- Multi Asset Class Risk
- Portware
- ETFs
- Portfolio Analysis 3

2018
**OPEN FLEXIBLE TECHNOLOGY**
- Open Access Partnership
- Open-FactSet
- Data Exploration
- Analytics APIs

2020
**DIGITALIZATION & CONCORDED DATA**
- ESG and Sector Data
- Asset Manager Portal
- Wealth Advisor Workflow
- Managed Data Services
- Pitch Lifecycle
Our Advantage

Financial Data
With more than 3 million client portfolios, 30+ FactSet-owned datasets (including two dozen exclusive sets), and 850 independent data providers, we are industry leaders in acquiring, integrating, and managing financial data.

Analytics
FactSet’s full range of analytics and trading solutions deliver data continuity and powerful, flexible, open solutions to evaluate and act on your portfolio across asset classes and strategies.

Technology
FactSet’s open and flexible technology includes a comprehensive data marketplace, a configurable mobile and desktop platform, digital portals, APIs, and more to transform the way you discover, decide, and act on opportunity.

Services
Partner with FactSet to solve your workflow challenges and implement solutions that will help your team chart new territories and work more efficiently.
Open & Flexible Technology Solutions

- Workstation
- Web
- Web Components
- CRM Integration
- Microsoft Teams Integration
- Portals + Dashboards
- APIs + Data Feeds
- Mobile
A Financial Workflow Solutions Provider
Financial Industry Trends
Digital Transformation in the Financial Industry

Firms are shifting to embrace new technologies and processes

- Growth in Alternative Data
- Infinite Computing Power
- Machine Learning
- Data Science as a Discipline
(Un)structured Data Fuels Decisions

What is the profile of this company?

How does this company fit into the complex global economy?

What’s happening right now with this company?

What’s happening right now with the global economy?

How can I generate more insight?

Core
- Fundamentals
- Estimates
- Ownership
- Equity/Debt Capital Structure
- Terms & Conditions
- People
- Global Exchange Pricing & Reference Data

Unique
- Geographic Revenue
- Supply Chain
- Shipping Transactions
- Revenue by Industry Classification
- Company Product Tradenames

Event-Driven
- Mergers & Acquisitions
- Private Equity/Venture Capital Transactions
- Events & Transcripts
- Corporate Activism
- StreetAccount News

Macro
- Benchmarks & Indices
- Economics
- ETF & Funds
- Country & Industry Market Aggregates
- Third Party Funds

Alternative
- Crowd-Sourced Estimates
- Environmental, Social, Governance (ESG)
- Geospatial
- Sentiment
- Human Capital

Coca-Cola Consolidated Unit Buys Snyder Production Center
March 22

US Monthly Consumer Survey Data

ISS ESG Carbon & Climate Impact Data
Data Connectivity Problems/Opportunity

**PROBLEMS**
- Data Silos
  - Disconnected Symbole
  - Inconsistent, Dirty Data
- Uptapped Opportunities
  - Identifying Private Assets
  - Credit Responsibility
- M&A and Corp. Action Handling
  - Identifier Changes
  - Regulatory Reporting

**SOLUTIONS**
- Smart, Connected Data Network
- Limitless Levels of Entity Hierarchy
- Historical Security Issuance
- Entity-Centric Data Model
- Ownership Affiliations
- Exchange Traded Derivative Linking
- Credit/Risk Exposure
- Credit Parent Relationships
- Named Entity Identification

**MANAGE YOUR DATA**

**SCREENED + CONNECTED BY FACTSET**

**ENTITY MAPPING + SYMBOLOGY RESOLUTION**
Fundamentals

The database of choice for the Research Analyst, Quantitative Analyst and Portfolio Managers

Composed of annual and interim/quarterly data, fundamentals data includes financial statement data, per share data, derived ratios, and business and geographic segments (750+ items).

FactSet Fundamentals Industry Metrics provides a rich, global data set of performance-driving metrics in airlines, retail, metals & mining, oil & gas, pharmaceuticals, hotels & gaming, banks, REITS, homebuilding, and telecommunications.

Intraday Updates

Receive the timeliest data available with intraday updates from press releases for more than 100 key items.

Updates are delivered three times a day.

Coverage at a Glance

<table>
<thead>
<tr>
<th>History</th>
<th>From 1979</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>80k+ public companies</td>
</tr>
</tbody>
</table>

View data in a standardized format to improve comparability across industries and countries.

Flexible delivery options allowing clients to choose a platform that best suits their needs.
## Estimates

Forward looking projections of company fundamentals from professional sell-side analysts

<table>
<thead>
<tr>
<th>Company</th>
<th>Analyst</th>
<th>Date</th>
<th>Rating</th>
<th>Estimation</th>
<th>Estimation</th>
<th>Target</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monness, Creppi, Hardt</td>
<td>Brian J. White</td>
<td>10 Aug '22</td>
<td>Buy</td>
<td>168.24</td>
<td>10 Aug '22</td>
<td>174.00</td>
<td>169.24</td>
</tr>
<tr>
<td>Bernstein Research</td>
<td>Toni M. Sacconagli Jr.</td>
<td>09 Aug '22</td>
<td>Hold</td>
<td>164.92</td>
<td>09 Aug '22</td>
<td>170.00</td>
<td>164.92</td>
</tr>
<tr>
<td>Wedbush Securities</td>
<td>Matthew Bryson</td>
<td>05 Aug '22</td>
<td>Buy</td>
<td>165.35</td>
<td>05 Aug '22</td>
<td>200.00</td>
<td>165.35</td>
</tr>
<tr>
<td>Daiwa Securities Co. Ltd.</td>
<td>Louis Macioscia</td>
<td>03 Aug '22</td>
<td>Overweight</td>
<td>166.13</td>
<td>03 Aug '22</td>
<td>192.00</td>
<td>166.13</td>
</tr>
<tr>
<td>Evercore ISI</td>
<td>Amit Daryanani</td>
<td>03 Aug '22</td>
<td>Buy</td>
<td>166.13</td>
<td>03 Aug '22</td>
<td>185.00</td>
<td>166.13</td>
</tr>
<tr>
<td>Neecham</td>
<td>Laura Martin</td>
<td>02 Aug '22</td>
<td>Buy</td>
<td>160.01</td>
<td>02 Aug '22</td>
<td>170.00</td>
<td>160.01</td>
</tr>
<tr>
<td>Elazar Advisors</td>
<td>Chaim Siegel</td>
<td>02 Aug '22</td>
<td>Hold</td>
<td>160.01</td>
<td>02 Aug '22</td>
<td>195.95</td>
<td>160.01</td>
</tr>
</tbody>
</table>

**Breadth of Broker Coverage**

Consensus estimates from **800+ brokers**, plus guidance, actuals, and detail estimates when entitled.

**Breadth and Depth of Data**

19k+ companies with active FY1 estimate, plus history back 20+ years globally for 60k+ active and terminated companies.

**Breadth of Data Item Coverage**

Core items such as EPS, Sales, Cash Flow, Target, and Recommendation, plus detailed and *industry-specific* forecasts.

---

**Coverage at a Glance**

- **History**: From 1997
- **Breadth**: 60k+ companies

See [here](#) for more information.
Ownership

View what funds, ETFs, institutions, and insiders are holding which global equities and fixed income securities worldwide for benchmarking and idea generation.

Sourced from global regulatory filings, annual reports, and transactions for global equity and fixed income.

Global history for equities back to 1999, with fixed income detail from 2013, across holdings (institutions, funds, insiders), transactions, and float.

See where the smart funds and competitors are putting their money, concentration or breadth of holdings and crowding.
People

Research key people for lead generation, CRM systems, ESG research, and concordance mapping

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Age</th>
<th>Company Tenure (Yrs)</th>
<th>Insider Holdings (%)</th>
<th>Salary</th>
<th>Total Comp</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tim Cook, MBA</td>
<td>Chief Executive Officer &amp; Director</td>
<td>61</td>
<td>24</td>
<td>0.020</td>
<td>$3,000,000...</td>
<td>$98,734,394</td>
</tr>
</tbody>
</table>

Currently, Timothy Donald Cook is Chief Executive Officer & Director at Apple, Inc. He is also on the board of NIKE, Inc., Duke University, The National Football Foundation &

At Company Since
Insider Holdings

1998
3,279,726

Breadth and Depth of Data

Contact info, jobs and board membership, insider holdings, and fund management information for 4.8m+ individuals mapped to 2m+ companies, public and private

A Broad, Nuanced View

Active coverage of companies with public reported financials, PE- or VC-backed private companies, stakeholders, and large subsidiaries

Reliable, Timely Data

Active yearly review and change monitoring via filings, press releases, and public websites
Private Company

Gain access to high-quality global company financial data for 2.6m+ private companies from a trusted provider to integrate into your investment process.

**Coverage at a Glance**

<table>
<thead>
<tr>
<th>History</th>
<th>From 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>5mln+ companies</td>
</tr>
</tbody>
</table>

See here for more information.

---

### Stripe, Inc.

0CCP5P-E | Private Company | Specialty Finance and Services (3630)

Stripe is a global technology company that builds economic infrastructure for the internet. Businesses of every size from new startups to public companies like Salesforce and Facebook use the company’s software to accept online payments and run complex global operations. The company combines economic infrastructure with a set of applications for new business models like crowdfunding and marketplaces, fraud prevention, analytics, and more. Stripe navigates global regulatory uncertainty and partners closely with internet.

<table>
<thead>
<tr>
<th>Stats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue (USD/M)</td>
</tr>
<tr>
<td>Employees</td>
</tr>
</tbody>
</table>

as of 31 Dec '20

---

### Breadth of Company Coverage

Coverage includes 9m+ private entities, 2.6m+ with financials, and a 360-degree view of a company’s business.

---

### Breadth of Data

91+ financial data items in addition to items like # of employees and post-money valuations, with coverage rapidly expanding.

---

### Part of a Connected Data Suite

Fully connected data model with plug and play symbology to Private Equity, People, and M&A data sets.
Private Equity
Track the global PE/VC landscape and the entire private company lifecycle

General Atlantic LLC (General Atlantic) is a private equity firm founded in 1980 by Charles F. Feeney. The firm is headquartered in New York City, New York. General Atlantic invests in public and private companies located across the globe. The firm targets companies operating in the fields of climate, consumer, financial, health, and technology.

<table>
<thead>
<tr>
<th>AUM (Reported)</th>
<th>ACTIVE</th>
<th>AVERAGE HOLDING PERIOD</th>
<th>ACTIVE FUNDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$79.0B</td>
<td>167</td>
<td>4.2 Yrs.</td>
<td>7</td>
</tr>
<tr>
<td>as of 18 Jul '22</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STATED INVEST. TYPES</th>
<th>TOTAL</th>
<th>STATED INVESTMENT SIZE</th>
<th>AVERAGE FUND SIZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>LATER STAGE</td>
<td>338</td>
<td>$25.0M - $300.0M</td>
<td>$6.8B</td>
</tr>
</tbody>
</table>

Extensive and Trusted Data
Sourced from FOIA requests, registries, corporate filings, company websites, news providers, we have data on 26k+ firms, 115k+ funds, and 230k+ portfolio companies.

360-Degree View
Analyze fund performance; GP, LP, and portfolio company details; and transaction data like post-money valuations.

Part of a Connected Data Suite
Fully connected data model with plug & play symbology to Private Company, People, and M&A data sets.
Events & Transcripts

Access comprehensive data, transcriptions, and audio recordings on key company events, including earnings calls and releases, and analyst/investor/shareholder/special meetings.

Perform sentiment analysis utilizing natural language processing and FactSet’s standardized XML machine readable format for intraday raw and corrected company event transcripts.

FactSet’s Near Real-Time Transcripts API enables investors to process what is being said in earnings calls and company events within seconds of the words leaving the speaker’s mouth.

In real time, analyze sentiment, monitor multiple calls simultaneously, focus on important events of the day, and react almost immediately to indicators communicated in an event.

Timely Access to Valuable Information

Part of a Connected Data Suite

Enhance your analysis of corporate events by linking participants to relevant content sets, including FactSet People and Estimates Detail.

Coverage at a Glance

History  From 1999
Breadth  13k+ companies

See here for more information.
News, Research & Filings

Real-time curated articles and market summaries written by industry professionals who add new/novel material and provide relevant context and perspective in company news.

Comprehensive US and European company coverage back to 2003 for distilled, cognizable news stories collected from corporate conference calls, FDA and EU drug approvals, SEC filings, FTC antitrust decisions, brokerage firm upgrades/downgrades, and trading floor conjecture.

Easily consumable, machine-readable XML format that can be seamlessly analyzed within Python or other programming languages.

Comprehensive metadata tagging, time stamps, categorizations, and relevant companies that can be algorithmically searched to identify applicable news stories.

Around-the-clock market summaries of the U.S., European, and Asian markets including overnight summaries, pre-market futures trading updates, and sector highlights.

Coverage at a Glance

<table>
<thead>
<tr>
<th>History</th>
<th>From 2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>2m+ news stories</td>
</tr>
</tbody>
</table>

See here for more information.
Economics

Track past and future economic events, estimates, and series for key economic indicators including GDP, CPI, unemployment, government debt, government yield, interest rates, and housing starts.

Focus your analysis on the highest impact economic events using FactSet’s importance indicator, which gauges market relevance based on estimate contributors and historical market impact.

2,250 standardized economic series create uniformity across region and country for a clear historical comparison of indicators.

Long text event notes provide context, importance of the event, market perception, and general economic theory of the indicator.

Coverage at a Glance

<table>
<thead>
<tr>
<th>History</th>
<th>From 1920</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>2.2mln+ series</td>
</tr>
</tbody>
</table>

See here for more information.
Global Sanctions

Access everything you need to monitor the entities (companies and individuals) directly specified on major economic sanctions lists along with the necessary FactSet symbology and data to identify related entities and securities as well as connecting relationships.

Timeliness & Breadth
Access timely coverage from over 150 global sanction lists, including the dates the individual or entity first appeared and last appeared on the list.

Connected Content
All entities from the sanctions lists are assigned FactSet symbology, allowing users to connect entities to the rest of FactSet’s integrated content.

Industry Leading Entity Data Model
Identify direct relationships, parent hierarchy relationships, and affiliated entities for a robust understanding of the direct and indirect exposures to sanctioned entities.

Coverage at a Glance

<table>
<thead>
<tr>
<th>History</th>
<th>1981 (US); 2000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>27,000+ Entities</td>
</tr>
</tbody>
</table>

See here for more information
Corporate Transactions

Be alerted of corporate transactions including detailed overviews of company mergers, acquisitions, leverage takeover defense, activism, corporate governance, poison pill defense, and proxy proposal voting history.

Timeliness and accuracy of FactSet Mergers allows clients to review the deal the day it’s reported.

Both public and non-public deals are available via feed the day they are announced.

New deal information is also processed daily providing detail updates for up to 300-450 deals per day.

FactSet’s proprietary Bullet Proof Rating summarizes corporate governance provisions and quantifies the relative strength of a company’s takeover defenses, allowing users to identify companies with strong and weak defenses.

Link company proxy proposal results with fund voting influence.

By using company common shares outstanding at the time of annual meeting and fund shares held from Ownership, clients can determine percentage held by the fund to measure and predict fund ultimate voting impact.

Coverage at a Glance:

<table>
<thead>
<tr>
<th>History</th>
<th>From 1992</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>Varies</td>
</tr>
</tbody>
</table>

See here for more information.
TruValue ESG
Leverage artificial intelligence to objectively assess corporate ESG behavior from the perspective of external stakeholders

Coverage at a Glance

<table>
<thead>
<tr>
<th>Coverage</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>History</td>
<td>Varies</td>
</tr>
<tr>
<td>Breadth</td>
<td>187k+ companies</td>
</tr>
</tbody>
</table>

Uncover blind spots by tracking ESG performance for a universe of 187k+ public and private companies

Mitigate risk by monitoring timely, real-world outcomes rather than company policies and practices

Access daily scores as well as positive and negative ESG events to capture outcomes at the speed of current events

Integrate ESG scores into quantitative strategies that are uncorrelated and additive to traditional factors
Fixed Income

Access 250+ price, T&C, and analytics data items for a diverse range of global corporate, government and agency bonds

FactSet has built a sophisticated fixed income content collection operation throughout the past several years, as our bond analytics capabilities have set the pace for the industry.

### Industry-Leading Sophistication

- **Coverage at a Glance**
  - **History**: From 2010
  - **Breadth**: 4.5mln+ securities

  [See here for more information](#)

<table>
<thead>
<tr>
<th>Issue Status</th>
<th>Current</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offering Date</td>
<td>18-Oct-2018</td>
<td></td>
</tr>
<tr>
<td>Issue Date</td>
<td>07-Nov-2018</td>
<td></td>
</tr>
<tr>
<td>Maturity Date</td>
<td>01-Nov-2026</td>
<td></td>
</tr>
<tr>
<td>Security Type</td>
<td>Corporate Bond/Note</td>
<td></td>
</tr>
<tr>
<td>Offer Type</td>
<td>Rule 144A</td>
<td></td>
</tr>
</tbody>
</table>

| Coupon(%)  | 8.000 |
| Coupon Type   | Fixed |
| Payment Frequency | Semi-Annual |
| Day Count Basis    | 30/360 |
| Dated Date | 07-Nov-2018 |
| First Coupon Date | 01-May-2019 |

### Actionable Analytics

Access standard and advanced fixed income analytics at the instrument level in order to better understand a security’s contribution to portfolio risk exposure and return on investment.

### Multidimensional Linkages

Seamlessly connect instrument-level data with issuer, credit parent, and ultimate parent data to enable cross-content analysis of value, momentum, and quality.
**Pricing & Corporate Actions**

Equity pricing data solutions with world-class security coverage, analytics, and flexible delivery options that fit seamlessly into client workflows.

---

### Coverage at a Glance

<table>
<thead>
<tr>
<th>History</th>
<th>Breadth</th>
</tr>
</thead>
<tbody>
<tr>
<td>From 2006</td>
<td>686k+ listings</td>
</tr>
</tbody>
</table>

---

### Broad Listed Equity Coverage

- 190+ trading venues spanning both developed and emerging markets
- Broad security type coverage
- 7-day trading calendar support
- Listing-level data along with composite pricing for Canada, Germany, Australia, India, and USA

---

### Ease of Use

- Seamless data connectivity from listing to security to entity using FactSet symbology and industry standard symbology systems
- Pre-calculated total returns data for common time horizons
- Flexible delivery solutions for bulk consumption in relational format or RESTful API
- History back to 2006 coming soon

---

### Granular Corporate Action Details

- Precalculated combined adjustment factors to make historical price adjustment easy
- Seamlessly manage changes to upcoming/historical corporate events via the FactSet event ID
- Identify cancelled dividends to gauge investment impact
- Process price adjustment events easily so users can focus on value-add work
Real-Time Exchange Data
Rely on a partner with decades of experience collecting and delivering exchange data solutions

Coverage at a Glance

<table>
<thead>
<tr>
<th>History</th>
<th>Tick data from 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>200+ exchanges</td>
</tr>
</tbody>
</table>

See here for more information

Scalable and Reliable

- Normalized data across sources, for real time and historical data; consistent across FactSet workstations and APIs
- Data requests using standard security identifiers (e.g., CUSIP, ISIN) in addition to FactSet proprietary symbology
- Navigation from entity level to security level identifiers using Symbology API

Value Added Services and VoR

- Trade safe conflation, custom conflation, and delayed options
- Calculated fields, basic reference data, symbol cross-referencing, derivatives chaining all available within the feed itself
- FactSet Vendor of Record: Save on exchange fees by netting between FactSet workstation and third-party UI applications
- FactSet handles administrative burden of exchange reporting

Zero Footprint Distribution

- Streaming SDKs in multiple programming languages and RESTful services for snapshot and historical data requests
- Choose watchlist vs. full exchange access and tick-by-tick vs. performance-optimized service
- Fully-hosted service with service endpoints available in-cloud in any AWS region
- Managed connectivity options (via extranets or over internet)

Cloud Hosted Applications

Ticker Plants

Delivery Platforms

Cloud Hosted Applications
Open:FactSet Marketplace

DIVERSE DATASETS
Find everything from ESG and crowd-sourced data to sentiment, shipping, and satellite feeds. The Marketplace is the place to discover the data you need to power your investment workflows. Click here for a list of available content.

SCREENED BY FACTSET
Data providers are carefully selected by FactSet to ensure data quality and integrity. We do the screening so you can be confident in your choice of dataset.

ALREADY CONNECTED
All data is harmonized before it reaches the Marketplace, solving the challenge of back-end connectivity for clients. Seamlessly link Open FactSet data feeds with your models, systems, and proprietary data freeing your team to generate new ideas faster.

PRE-LINKED & READY FOR USE
Click here for a complete list of content available on the Marketplace.
Data Management Solutions (DMS)

Simplify your data management with a market-leading entity master and historical hierarchy.

Seamlessly access linked reference data for companies, securities, derivatives, funds, and individuals to enable data management across workflows and systems.

Understand companies' operational structures through time, aggregating from securities to issuer and ultimate parent levels to manage risk and gain greater insights into true exposure.

Simplify data operations and lower the cost of integration by interconnecting content across data stores with established linking across Entity and Security Identifiers (LEI, CIK, EIN, S&P, Moody's, & Fitch Ratings Issuer IDs, ISIN, CUSIP, SEDOL, FIGI, Tickers, and more).

Coverage at a Glance

<table>
<thead>
<tr>
<th>History</th>
<th>From 1972</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadth</td>
<td>10.7m+ entities</td>
</tr>
</tbody>
</table>

See here for more information.
Detect Prospects and Opportunities with Thematic Intelligence

DATA SOURCES
- Web Crawling
- News
- Reports, filings
- Research
- Internal Files
- CRM

PROCESSING & MATCHING
- Individuals
- Companies and Industries
- Licensed Ontologies
- Public Knowledge
- Structured Data
- Unstructured Data

ANALYTICS
- Text Mining / NLP / Semantic Analysis
- Industry Classification
- Relationship Extraction
- Frequency and Significance Analysis
- Topic Detection

360-degree data analysis and Neuro Graph scale-up (enrichment)

SIGNALS CONFIGURATION
- Scoring based on graph nodes and edges, metadata, analysis results and...
- Supervised Topics
- Machine Learning
- Structured KPI Analysis
- Business Rules

Flexible configuration of signals by data scientists and client professionals

SIGNALS IDENTIFICATION
- Identify prospects and business opportunities
- Rate opportunities to increase efficiency and success rates
- Find out when is the right time to approach
- Access comprehensive background information
- Better understand connections, networks and communities

Intelligent scoring and insights provisioning of relevant companies, industries, and events

GRAPH SCALE-UP AND SCORING
A Winning Combination of Two Strong Partners

**FactSet**
- People Data as trusted source
- Ownership Data (Delta of Ownership)
- Sanctions Data
- KYC & Sanctions Data
- Insider Trading
- Supply Chain
- Transactions / M&A
- Company Data
- Entity Master
- ...

**CID**
- "Methodology" / AI / Lake / Signal training
- Public Web Content
- Integration of 3rd party specialist datasets
- Integration of proprietary client CRM data / allocation rules / territory definitions
- Standard and tailor-made signals
- Assembly of knowledge graphs
- Provision of API output and/or Frontend HTML Widgets (from CID ThemeScape)
Focus on Technology
Flexible Technology

**PLATFORM CHANNELS**
- Desktop
- Web
- Mobile

**OFF PLATFORM CHANNELS**
- Digital solutions
- Data Feeds & APIs
- Enterprise hosting

**PARTNERSHIPS**
- Chat/collaboration
- Online Marketplaces
- CRM integration
- Cloud solution providers

**CUSTOMER MANAGEMENT**
- salesforce
- Microsoft Dynamics 365

**MESSAGING**
- Microsoft Teams
- SYMPHONY

**COLLABORATION**
- FACTSET ProductivitySuite™
- FACTSET RMS™
- Office 365
- AWS marketplace
- Power BI

**CLOUD**
- Azure
- Google Cloud
- AWS marketplace

**DATA ANALYSIS & VISUALIZATION**
- Tableau
- Snowflake
Flexible & Open Data Eco-System

The flexibility of Cloud providers & API delivery allows FactSet to more easily integrate with external partners and application developers supporting our open & flexible strategy.
Data Exploration
Access, Analyze, Visualize

Data Exploration (DX) is a streamlined, simple tool to explore and evaluate new data. Seamlessly connect to our fully managed environment, powered by Snowflake and integrated with industry standard applications, to access all Open:FactSet Marketplace content.

Key Features:

- **Fully Hosted**: No need to install, load or configure anything
- **Instant Access to Data**: All FactSet & 3rd party data vendors preloaded into a relational database (100+ datasets)
- **Programming Languages / Tools**: Snowflake, Python, R
- **Workflow**: Store scripts, data files and share information with team members
- **Visualization**: Tableau integration to build or view interactive data visualizations
- **Custom Data**: Upload Client specific data to align with FactSet or 3rd party provider content
FactSet's Snowflake integration allows access to our structured and semi-structured DataFeeds without the need for ETL, Infrastructure, or Database Management.

**Multi Cloud Approach:** Access data across AWS, GCP and Azure

**Quick Setup:** FactSet data is available within minutes of ordering with no physical movement of data

**Snowflake Marketplace:** Find all FactSet content on the Snowflake marketplace for easy access to new, rich data sets

**Separation of Storage and Compute:** Only pay for the Snowflake compute needed, not the storage of FactSet data

**Content Delivery Beyond Relational Feeds:** Integration with FactSet’s rich data products and services like Tick History, Semi-Structured, and Concordance.
FactSet DataFeeds via Amazon Redshift

FactSet’s Amazon Redshift integration couples AWS’s scalable, highly performant infrastructure with the power of FactSet’s pre-linked rich content sets, without the burden of ETL. Easily leverage turnkey solutions with the power of AWS and FactSet for your data needs.

- **Data Sharing Capabilities**: High performance access without data copies or ETL
- **Compatible with entire AWS product suite**: Opportunity for easy integration into AWS’ ecosystem of hundreds of products & services.
- **Flexible contracting**: Purchase directly via the Amazon Data Exchange or directly via FactSet, with content available in minutes.
- **Vast Content Ecosystem**: Access a wide variety of FactSet content, technology & analytics with the AWS ecosystem, including Real-Time, Transcripts, News, Standard DataFeeds and Tick History.
Google Analytics Hub

Access FactSet’s Data Assets Securely and Efficiently via Google’s Analytics Hub directly in BigQuery.

Technology:
BigQuery – Cloud Data Warehouse
Data Sharing

Products:
20 Content sets including Data Management Solution, FactSet Fundamentals, Supply Chain, Estimates and others)

Regions:
Americas

When:
Now – Public preview
Q4 2022 – Official launch
(subject to change)
Rely on World-Class Client Training and Support

Account Teams and Product Specialists

- Onboarding and supporting
- Proactive client engagement
- Maximizing the use and adoption of FactSet

Retention Rate 95%
Thank You

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