

Solutions for Research Management

FactSet's research management solutions give you all the tools you need to submit, receive, analyze, and evaluate research and ideas from internal analysts, external brokers, and corporate access meetings.

Gain a Clear View of the Research Spectrum

FactSet provides you with the tools to effectively manage the enormous amount of internal and external research that is sent and received by your firm each day.

Every day, a myriad of research comes across your desk: internal reports and meeting notes; broker-provided research and investment ideas; real-time news feeds; and a deluge of e-mails, phone calls, and instant messages. In addition, you have to juggle conference calls, meetings with analysts, and industry conference obligations.

With all of this information competing for your attention, how do you make effective and objective investment decisions? Can you be sure your information is complete and inclusive of all viewpoints within your research team? Can you attribute and reward performance internally and externally? How do you share and retain the intellectual capital of the research and ideas that belong to your firm? How can you effectively manage your broker relationships and commission allocations?

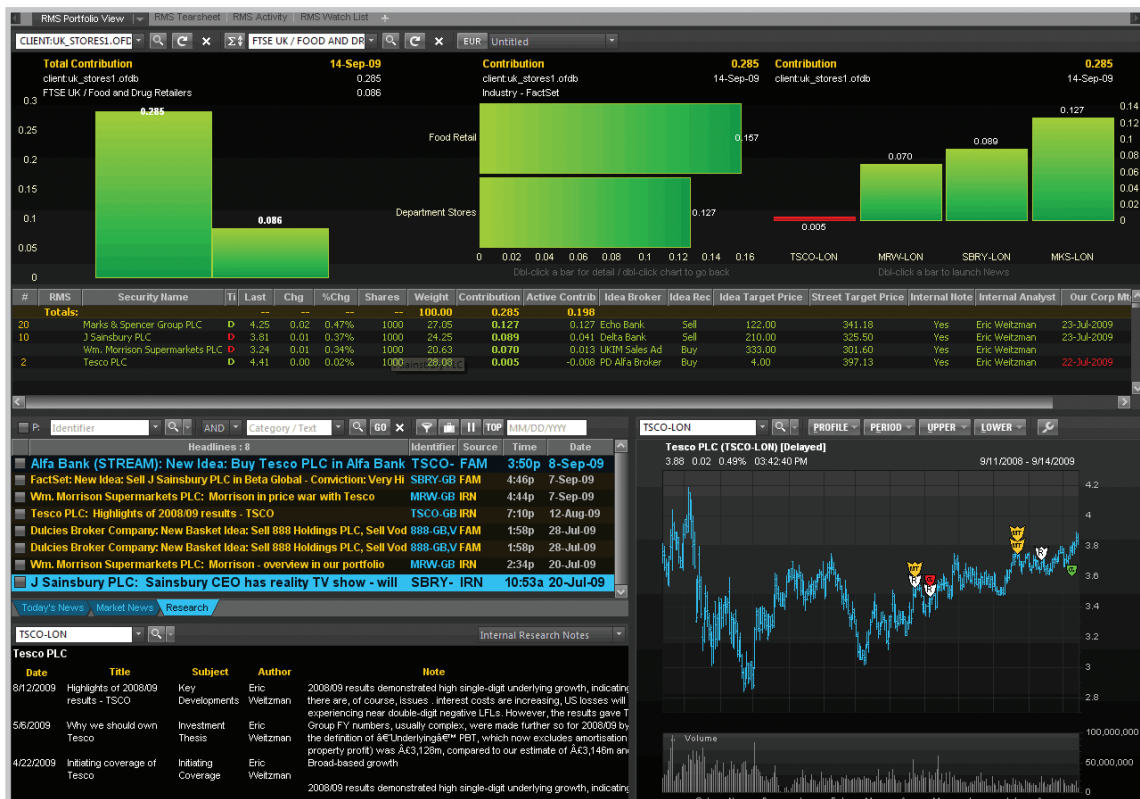
FactSet's research management solutions are designed to solve these issues and bring you a clear view of the entire research spectrum. These solutions give you a direct path from receiving internal and external research to finding actionable ideas and producing measurable results.

Streamline the idea channel to determine which internal investment teams and external brokers will supply you with research, so you can easily and effectively filter and quantify information. Research is integrated alongside other news you receive through FactSet and can be accessed within the analysis tools you already use. FactSet's research management solutions let you objectively measure performance.

Connect Investment Teams

Research management solutions connect the global investment community:

- + Research teams improve internal communications by submitting, storing, and cataloging content, while objectively measuring performance and tracking the quality of investment ideas
- + Portfolio managers find actionable ideas and assess the value that brokers and their internal research teams are adding
- + Brokers forge a direct link to clients interested in their recommendations or the corporate access they provide, and can demonstrate their value and talent in a transparent environment



Get an overview of the performance of a single company and the ideas relevant to this company alongside an overview of how your portfolio is performing.

Manage Research with One System

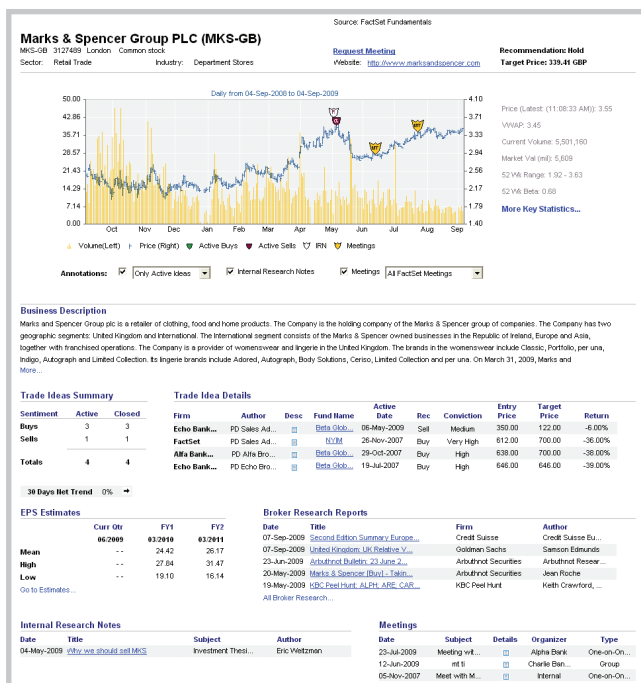
With FactSet's research management solutions you can store and disseminate internal notes, research, and analyst ideas, alongside investment research, broker trade ideas, corporate access, and estimates from within one integrated platform.

Include Research and Ideas in Your Process

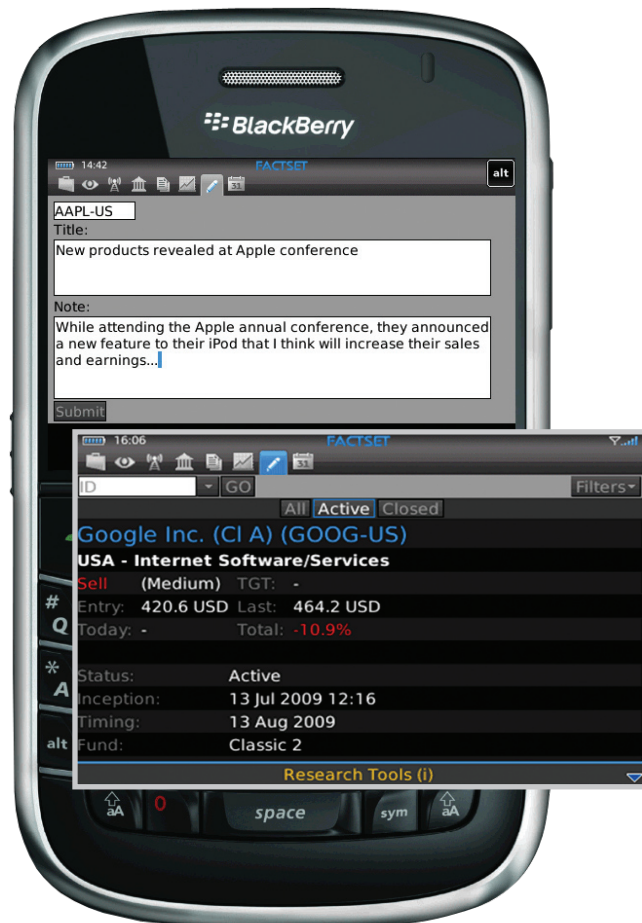
Gain a complete synopsis of research, including broker and internal investment ideas, sell-side research and estimates, internal research, and models within the same FactSet platform that lets you analyze market data and track the events and market conditions that affect your watch list and portfolios. Annotate any price chart with your research, ideas, and corporate access meetings.

Improve Collaboration and Track Performance

Promote collaboration within your internal research team by streamlining communication, sharing information, and tracking the performance of ideas from brokers and your internal analysts.



View recommendations from internal and external brokers, and see how a company's stock price performed after key meetings and research.



Write research notes and check updates to broker ideas on-the-go using FactSet on your BlackBerry.®

Manage Received Research

Get the most out of your brokerage relationships and internal research distribution with a more focused and disciplined approach to receiving, organizing, and alerting users of incoming research and ideas. Use FactSet to filter the research based on the criteria that matters most to your investment process.

Follow Street Opinions

Access the latest estimates, recommendations, and target prices from FactSet Estimates, and evaluate them side-by-side with those of your own internal analysts.

Track and Evaluate Meetings

Catalog, share, and track one-on-one and group meetings and conferences, assigning a value to each to increase accountability and aid in broker evaluations.