FACTSET WORKSTATION

Gain instant anytime, anywhere access to the financial data and analytics that you need to make crucial decisions.

TRACK MARKET ACTIVITY IN REAL TIME
Be informed on the events that are most important to you. Know what’s impacting the market with streaming news and research including the latest and upcoming economic releases and earnings calls, as well as breaking news and trends. Target your research by searching for events by company, portfolio, or index and then narrow your results by various categories.

TAKE ADVANTAGE OF UNIQUE COMPANY AND MARKET DATA
Access FactSet’s expansive data and flexible reports to perform deep public and private company, industry, and market analysis. Receive intraday updates on global data items including industry and segment information with the ability to link back to source documents. Deepen your analysis with FactSet’s extensive data for public and private companies and their debt issues, private equity and venture capital firms and funds, macroeconomic series, global M&A deals, ownership details, and people. Identify opportunities and measure risk exposure in the global equities and derivatives markets using FactSet’s supply chain, geographic revenue, and entity structure information.

- Map a company’s key relationships including its customers, suppliers, partners, and competitors
- Analyze geographic revenue exposure with over 250 combinations of countries, regions, and subregions
- Understand a company’s complete entity structure at the issuer, subsidiary, and parent levels

FOLLOW THE LATEST DEVELOPMENTS WITH STREAMING NEWS AND QUOTES
Stay one step ahead with content from premium news outlets and hundreds of global exchanges. Set alerts to be notified when a security is in the news or reaches specific criteria such as target price, a 52-week high or low, or a certain P/E. Filter out the noise with distilled news summaries from FactSet StreetAccount.
EXPLORE DOCUMENTS USING SMART SEARCH TECHNOLOGY
Save time and effort in idea generation, information gathering, and research analysis workflows with FactSet’s extensive universe of documents. Leverage smart search tools and AI to easily find relevant results for your queries. Search across multiple sources including broker research, filings, transcripts, investor slides, alternative data, and your proprietary research.

ACCESS FACTSET FROM ANYWHERE
Mobile solutions let you edit watchlists, monitor performance, access quote activity, and keep up with investment news directly from your phone or tablet. FactSet also gives you access to full-featured reports and applications via a secure web portal that works from anywhere, allowing you to collaborate with colleagues around the world.

GENERATE IDEAS WITH POWERFUL SCREENING TOOLS
Use sophisticated screening technology to search for public and private companies that meet your criteria. Create quick industry analysis, design complicated stock selection models, screen for precedent transactions, and test investment theories to find untapped investment opportunities.

MEASURE PORTFOLIO PERFORMANCE
Monitor your portfolio throughout the day by examining performance, risk, and composition in real time. Analyze your portfolio across asset classes and strategies using FactSet’s full range of investment and risk analytics. Drill into your portfolio returns with sophisticated analytical tools that allow you to decompose performance across regions, countries, sectors, and industries.

TAILOR YOUR RESEARCH WORKFLOW
FactSet fully integrates internal research and meeting notes into the applications you already use to analyze the market so you can easily create, store, and disseminate ideas. Collaborate across disparate teams, ensure the security and continuity of your ideas, and maintain transparency to comply with evolving regulations with FactSet’s centralized research repository.

DISCOVER, MEASURE, AND REPORT SUSTAINABILITY
Build sustainable investment strategies and create multi-asset class reports with flexible ESG data, research, and analytics. Analyze the global economy’s ethical practices and performance in areas such as carbon intensity, fossil fuel exposure, and board diversity. Develop, test, and implement your best research ideas with cohesive applications, market benchmarks, and trusted ESG integration.

BUILD DYNAMIC MODELS, REPORTS, AND PRESENTATIONS
Use FactSet’s tools for Microsoft Office to retrieve, update, chart, and audit data in your models and presentations. Customize reports by automatically applying your firm’s standard formats and branding.