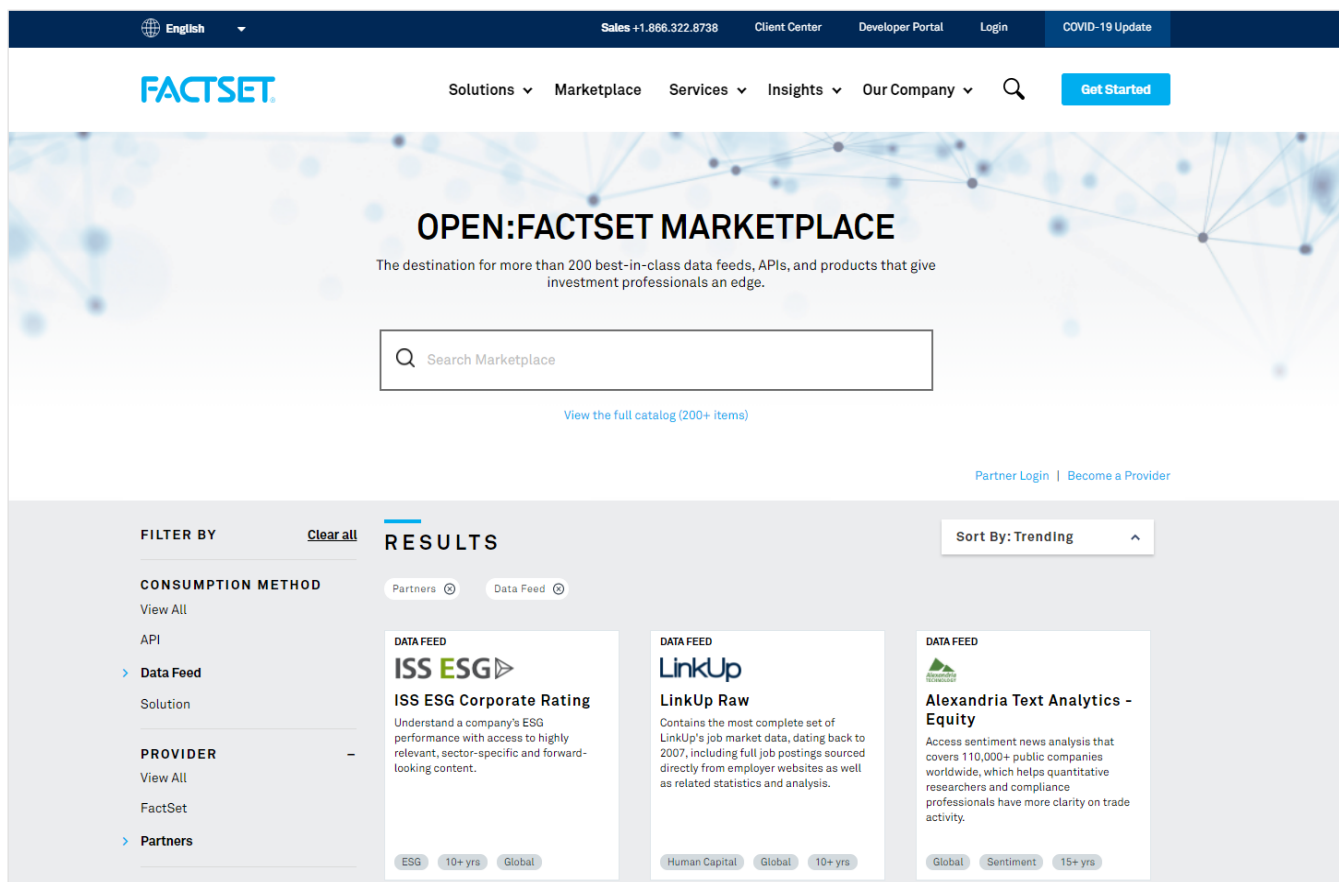


Benefits of Becoming an Open:FactSet Marketplace Partner (Enhanced)



WHAT IS THE OPEN:FACTSET MARKETPLACE?

The Open:FactSet Marketplace (OFM) is an open data marketplace designed primarily for the investment community. Built on FactSet’s four decades of integrating financial data and analytics, OFM allows a wide range of financial and corporate institutions to source premium data, applications, and workflow solutions within a single ecosystem.

All partners on OFM are carefully screened by FactSet so that our users can be assured of a high standard of content and data quality. We work with carefully vetted partners to thoroughly evaluate and integrate unique data into our various data feed delivery platforms. The content is then connected by our hub-and-spoke data model to help expose relationships between disparate identifiers. This model provides the foundation to integrate and manage data while optimizing the organization of a firm’s internal content assets as well as third-party content.

WHY BECOME AN OFM PARTNER?

- **Expanded Distribution Channels and Administrative Assistance**
 - Take advantage of FactSet’s extensive network of users and prospects. Our sales teams are skilled in identifying and proposing unique pairings of your data with our complementary offerings—either from our content collection or other partners.
 - Ease your administrative burden. We will manage your delivery, contracting, and billing.
 - Kick-start your own client trials using the latest content and technology solutions including fully hosted, ready-to-use environments such as FactSet’s own Managed Database Services and Quantitative Research Environment (QRE), plus major cloud platforms from Snowflake and AWS. Use cloud-computing to begin testing new datasets immediately without the need for infrastructure resources.
- **Enhanced Data Integrity**
 - Benefit from FactSet’s connected data model. We will fully map your data to its industry-leading Symbology Master and Entity Master databases, addressing the most challenging and time-consuming hurdle your clients face when taking on a new product.
 - Leverage FactSet’s 40+ years in data management and content integration to enhance your offering. We will conduct an in-depth analysis of your data as well as a robust series of data integrity checks and balances to ensure the highest possible quality and reliability.
- **Improved Usability**
 - Rely on FactSet to help you prepare and document your data for client consumption. Our team will apply data standards and modeling transformations to promote ease of use.
 - Receive additional value-added collateral and use case examples. FactSet will create content and collateral including Jupyter Notebooks, Tableau dashboards, sample Python code, and SQL queries to highlight the value of your content.

jupyter 5.3 Alexandria Real-Time ESG - Creating a Net Sentiment Factor
Python 3

Trusted | Python 3

Memory: 669.2 MB

```
In [6]: topic = 'ESG/ENVIRONMENT'

aesg_env = aesg[aesg.aesg_topic_id.str.startswith(topic)==True].copy()
aesg_env.tail(5)
```

Out[6]:

	aesg_story_id	ticker_region	aesg_topic_id	aesg_datetime	aesg_sentiment
14626	ZDM4Q1VWNVZTQVVIQVFRRENBaFhXdz09	LNT-US	ESG/ENVIRONMENT/ENERGY	2020-05-01 19:58:49	1
14629	ZDM4Q1VWNVZTQVVIQVFRRENBVldXdz09	D-US	ESG/ENVIRONMENT/ENERGY	2020-05-01 19:33:36	1
14630	ZDM4Q1VWNVZTQVVIQVFRRENBVldXUT09	D-US	ESG/ENVIRONMENT/ENERGY	2020-05-01 19:33:02	1
14687	ZDM4Q1VWNVZTQVVIQXdRREFBSIVYZ09	BLK-US	ESG/ENVIRONMENT/SUSTAINABILITY	2020-05-03 11:59:30	1
14688	ZDM4Q1VWNVZTQVVIQXdRREFBSIVYZ09	MSCI-US	ESG/ENVIRONMENT/SUSTAINABILITY	2020-05-03 11:59:30	1

Step 3: Apply Date Adjustments

The news sentiment will be aggregated daily for each company using articles published prior to 4 pm EST. Any articles published after 4 pm, will be rolled over to the following day.

To do this, we will start by converting all times from UTC to Eastern Standard Time. Next, we will use `aesg_datetime` to roll articles published after 4 pm to the next day. Please note this does not account for holidays or business days.

```
In [7]: # Convert aesg_datetime to EST and store as a new column.
aesg_env['aesg_datetime_EST'] = aesg_env['aesg_datetime'].dt.tz_localize('UTC').dt.tz_convert('US/Eastern')

#Roll articles published after 4pm to the following day
aesg_env['date'] = aesg_env['aesg_datetime_EST'].apply(lambda x: (x + pd.Timedelta(days=1)).date() if x.hour>=16 else x.date()
```

WHY BECOME AN OFM PARTNER? (CONT.)

- **Comprehensive Research and Development Tools**
 - Showcase your content to FactSet users with Data Exploration (DX). Within DX, users can quickly, easily, and cost-effectively access your data in a hosted environment that includes industry-standard databases, programming languages (Python and R), and data visualization tools. DX eliminates the time and cost of trialing data locally by providing its users with everything needed to analyze the latest content via a simple log in. Read-only permissions are applied to secure and prevent unauthorized access to your data.
- **Greater Exposure and Discoverability**
 - Generate new leads from various industries as users browse, search, and discover your products within the Open:FactSet Marketplace. FactSet will work with you to create unique provider and product pages that highlight your key selling points and feature your marketing materials, white papers, case studies, and sample data. Additional collateral such as product-specific videos and FactSet-hosted webcasts can also be created to increase awareness.
 - Collaborate with global sales and marketing teams to highlight the best industry use cases for your data. This content is often paired with proprietary datasets from FactSet's comprehensive collection to deliver complete content solutions to your clients. Leverage frequent, thematic-aligned sales campaigns to further promote your content sets.
- **Flexible Implementation and Ongoing Support**
 - Facilitate and improve the internal processes of users who manage their vendor datasets through local, on-premises relational database environments. Leverage FactSet's DataFeed Loader to load, update, and maintain datasets automatically. Enable users to link data feeds from OFM to internal models and systems without the need for custom code. Experience seamless, hassle-free technical setup and assistance with minimal preparation or ramp-up time.
 - Trust that your workflows remain uninterrupted and ensure all your clients' content needs are met with FactSet's decades of expertise in data implementation and an arsenal of experienced engineers and quality assurance staff. Access round-the-clock support, 365 days a year, to address everything from production issues and content questions to subscription additions or modifications. Our experts will liaise directly with you to accommodate and help resolve all your client methodology and data queries.



HOW ARE OFM PARTNERS SELECTED?

Partner selection is driven by client demand, industry trends, and a dataset’s alignment with content themes that have been prioritized by the Open:FactSet Product Management (OFPM) team. The table below identifies the primary themes and subcategories that are currently being prioritized.

In addition to prioritizing partners with data in these thematic categories, the OFPM team leads global go-to-market initiatives focused on them. To ensure the content for each theme is efficiently and effectively promoted, significant marketing and sales efforts are frequently coordinated.

PRIMARY THEMATIC CATEGORY	SUBCATEGORIES*
Business Relationships	Supply Chain, Shipping, Contracts, Loans, Competitors, Corporate Activism, Ownership
Company Reported Data	Fundamentals, Estimates, Corporate Actions, Events, Earnings Call Transcripts, Insider Transactions
Consumer Trends	Retail, Point-of-Sale, Website Traffic, Footfall, Web/Mobile Apps, Surveys
Deep Sector	Technology, Energy (Oil & Gas), Healthcare, Retail & Other Sectors, Weather, Commodities
Economic	Commodities, Health Statistics, Crime Rates, Environmental Risk, Shipping
ESG	Environmental, Social, Governance, Climate
Factor	Derived Values, Research
Human Capital	Compensation, People, Job Listings, Workforce & Individual Characteristics, Insider Transactions
Intellectual Capital	Intellectual Property, Patents, Intangible Assets, Brands
Market Data	Pricing, Short Interest, Mergers & Acquisitions, Ownership, Research
Risk & Compliance	Sanctions, Regulatory, Cyber Risk
Sentiment	Transcripts, Social Media, News
Geolocation	Location-Specific Data
Data Management	Industry/Sector, Classifications, Concordance Service, Corporate Hierarchy

* Ownership, Insider Transactions, Retail, and Commodities thematic subcategories apply to more than one primary thematic category.

HOW DO I GET STARTED?



Please contact cts.ofcs@factset.com for more information on how becoming an OFM partner will help you maximize the reach and relevance of your data. For the latest list of OFM partners and content themes, please visit the [Open:FactSet Marketplace](#).