Who is FactSet?

OVER 40 YEARS OF INNOVATION

FactSet is a leading provider of open and configurable data and technology for the global financial and investment community.

PREMIER CONTENT PROVIDER AND AGGREGATOR

850+ third-party datasets;
100+ Open:FactSet Marketplace datasets;
three dozen FactSet-owned datasets that include Shark Repellent and Street Account; and
$3 million+ client portfolios*

GROUNDBREAKING DATA AND INSIGHTS

Our industry-leading data and analytics applications, supported by insights from industry experts, track the latest market developments and uncover key financial trends to help inform your reporting on a wide range of topics from earnings, activism, ESG, and beyond.

HIGH INTEGRITY INFORMATION

Accuracy in reporting is paramount. FactSet data is high-quality, timely, and generates first-to-act ideas and insights that are best in class.

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We are Trusted by an Extensive Network of Financial Professionals

We offer best-of-breed public and private company data, content, and insights as well as industry-leading support and flexible delivery options—where, when, and how clients want it.

131,000+ diverse users and over 5,500+ clients across 75 countries rely on our data—from wealth and asset managers, buy- and sell-side, IT functions, and consultants of all types.

We are regularly recognized for our exceptional financial technology solutions with awards such as Best Overall Provider and Best Data Analytics Provider from Inside Markets Data; Best Buy-Side Trading System from Risk.net; and Best Alternative Data Provider from Waters Technology.

You can easily request data or analytics to source in your publication or ask our Insight blog authors a question.

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Delivering both real time data and in-depth insights to make your reporting stand out

Our Unmatched Data and Insights Can Contribute to Virtually Every Area of Reporting

**Companies and Markets:** Real-time data and industry-specific trends affecting today’s corporations and capital markets on subjects that include M&A, shareholder activism, ESG, and more

**Data Science and Technology:** Insights into how today’s tech and data science developments affect the financial ecosystem

**Company Performance/Earnings:** Customize insights into earnings trends and drivers of growth and performance for companies, sectors, and industries—both large and small

**Industry Trends:** Quantitative datasets and qualitative analysis of trends affecting industries that include wealth, asset management, and risk

**Economics:** Analysis of micro and macro trends affecting the global economy and financial markets, i.e., economic indicators, investor/consumer sentiment

**Risk, Performance, and Reporting:** Helping audiences understand how the intersection of risk management and financial performance affects the markets

**Regulation:** Timely analysis of new legislation and compliance policies
How We Can Work Together

FactSet’s data can be accessed, packaged, and delivered to you in multiple ways based on your unique needs

INSIGHT FROM OUR SUBJECT MATTER EXPERTS

In-house experts are available to share their latest thinking on the financial markets (either for background or attribution) on a situation-specific basis

ETF Working Lunch: Key Trends In ETFs This Year

July 22, 2020

The ETF industry has welcomed numerous active ETF launches so far in 2020, including the first nontransparent active ETFs, while facing one of the largest numbers of ETF closures, and a race to the bottom in fees that just won’t let up. It’s been busy, and Elizabeth Kashner, director of ETF research and analytics for FactSet, breaks down the trends that are shaping the industry this year.

REAL-TIME MARKET DATA

Up-to-the-minute market data and figures for inclusion in news briefs or breaking news on important market activity

TRENDS SPOTTING & RESEARCH REPORTS

In-depth insights/research on high-visibility topics your readers care about, like M&A and earnings
Sampling of Recent Insights from FactSet

**JULY 22, 2020**
The COVID-19–Induced Volatility of 1H2020 Accelerated ETF Fee Compression

In the first half of 2020, the relentless force of fee compression carried on uninterrupted with the preference for low-cost...

By Elisabeth Kashner, CFA | Companies and Markets

**JULY 22, 2020**
Institutional Ownership in the UK

For all indices and the UK market as a whole, the majority of UK shares are held by UK and U.S. Institutions.

By Sebastian Segestrom | Companies and Markets

**JULY 21, 2020**
U.S. IPO Market: IPOs Rebound Late in Q2 with the Equity Market

IPO activity slowed dramatically at the end of Q1 and the hesitation around new offers continued into Q2. However, June saw a...

By Sara B. Potter, CFA | Companies and Markets

**JULY 29, 2020**
S&P 500 Reporting Lowest Net Profit Margin Since 2009

All 11 sectors of the S&P 500 are reporting (or are projected to report) a year-over-year decline in their net profit margins in...

By John Butters | Earnings

FactSet Data Is Trusted by a Range of Widely-Read Financial Outlets

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A Sampling of Our Thought Leaders

**Phil Snow, CEO**
Prominent voice on client/industry trends as well as the company’s overall strategy and tech transformation. Passionate about diversity and inclusion in the workplace.

**Helen Shan, EVP, CFO**
Global finance executive who can discuss how to lead digital upgrades, cost management, and investing during times of crisis as well as trends in finance et al.

**Elisabeth Kashner, Director of ETF Research**
ETF expert and industry leader who manages FactSet’s ETF analytics, providing ETF classifications, ratings, and data.

**John Butters, Senior Earnings Analyst**
Leading analyst and commenter on trends in corporate earnings data for the S&P 500, including revisions to estimates, year-over-year growth, performance relative to expectations, and valuations.

**Pat Reilly, VP, Director, Americas Analytics**
Leverages deep experience in the investment management industry to focus on fixed income.

**Sara Potter, VP, Associate Editor, Thought Leadership and Insights**
Facilitates the analysis of global markets at a macro level, using FactSet’s vast benchmark and economic content sets.

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*Source: FactSet Internal Reporting.*
Let’s talk about how FactSet can help provide compelling and useful data and insights to inform your reporting.