

FACTSET

2025 Impact Report

PURPOSE IN MOTION

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> For us, sustainability is not primarily an environmental program. It is a commitment to running our business in a way that our clients, employees, and shareholders can rely on—today and over the long term.

Message From Our CEO

As I stepped into the role of CEO in 2025, I prioritized listening—learning from clients, investors, partners, and FactSetters. These conversations gave me a deeper appreciation of the values that guide us and highlighted the opportunity we have to continue making a meaningful impact through responsible and sustainable business practices and community engagement. One theme came through consistently: the things that matter most to our clients are the fundamentals—data security, operational resilience, the integrity of our data, the reliability of our platforms, and trust, especially in our new AI solutions.

That insight shapes how we think about sustainability at FactSet. For us, sustainability is not primarily an environmental program. It is a commitment to running our business in a way that our clients, employees, and shareholders can rely on—today and over the long term. The topics that sit at the heart of our program are not separate from our business strategy—they are an integral part of the strategy.

This report reflects that thinking. Over the past year we completed our first enterprise-wide Double Materiality Assessment (DMA), which gave us a structured and honest view of the issues that genuinely matter to our business and stakeholders. We refreshed our climate risk analysis. We moved our emissions data onto a cloud-based platform, improving the accuracy of our reporting. And we continued to strengthen the governance frameworks that underpin how we operate globally.

Since our FY23 baseline, combined Scope 1 and Scope 2 emissions have declined by approximately 20%, and Scope 3 emissions by approximately 5%, representing steady progress toward our Science Based Targets initiative commitments. This progress reflects the dedication and collaboration of teams across the organization.

In my time here I have met many FactSetters around the world, and I encountered the same thing: a team that genuinely cares about the work, takes pride in the role FactSet plays in global financial markets, and wants to continue to excel. That is why supporting our people—investing in their development and well-being—is central to our business.

Looking ahead, our focus remains on factoring sustainability into decision-making and operations so that it supports our growth strategy. It also means remaining focused on progress and addressing challenges as we navigate a changing global regulatory environment.

This report marks another chapter in our journey—one that continues to evolve as we act with intention and accountability to build a resilient, trusted, and enduring business.

I look forward to working with you all.



Sanoke Viswanathan
Chief Executive Officer, FactSet

About This Report

This report presents FactSet's sustainability practices and performance for FY25, covering the period from September 1, 2024 to August 31, 2025, unless otherwise stated.

The content reflects sustainability topics relevant to FactSet's business and operations and is informed by stakeholder engagement. During FY25, FactSet conducted a DMA to strengthen its understanding of sustainability-related impacts, risks, and opportunities. This report is not prepared in accordance with the EU's Corporate Sustainability Reporting Directive (CSRD), under which FactSet is not currently in scope. The DMA nonetheless considered elements of the European Sustainability Reporting Standards (ESRS) as a matter of good practice.

This report references the Sustainability Accounting Standards Board (SASB) Standards for Professional & Commercial Services. A SASB Content Index Table is included in the Appendix. FactSet also reports with reference to the Global Reporting Initiative (GRI) Standards. The GRI Content Index is available on FactSet's sustainability webpage.

FactSet obtains third-party assurance over its greenhouse gas (GHG) emissions, with assurance information available on the FactSet sustainability webpage.

For additional information on risks that may affect our business and financial performance, please refer to Item 1A, "Risk Factors," in our 2025 Annual Report on Form 10-K.



Cover photo: a view of our Paris, France Office.

Report Highlights

17K volunteer hours across 391 events

30K trees planted

88% engagement survey participation

First enterprise-wide DMA completed

20% reduction in Scope 1 & 2 vs FY23 baseline

5% reduction in Scope 3 vs FY23 baseline

97%[1] Code of Conduct certification rate

[1] Remaining 3% reflects employees on extended leave or nearing departure.

Climate Risk Assessment refreshed

AI Foundry launched for AI development and deployment

94% participation in learning programs



Our Business

- About FactSet
- Our Sustainable Investment Solutions
- Innovating with AI

About FactSet

FactSet is a global financial digital platform and enterprise solutions provider that delivers financial intelligence to investment professionals worldwide. Founded in 1978, FactSet has been publicly traded since 1996 and is dual-listed on the New York Stock Exchange and NASDAQ under the ticker symbol FDS.

FactSet provides data, analytics, and artificial intelligence- (AI-) powered technologies used by global financial professionals to support their critical investment workflows. As of August 31, 2025, FactSet served approximately 9,000 clients, representing more than 237,000 investment professionals, including institutional asset managers, bankers, wealth managers, asset owners, partners, hedge funds, corporate users, and private equity and venture capital professionals.

Our Platform and Solutions Governance

FactSet's open and connected platform delivers multi-asset class data and analytics through configurable desktop and mobile workstations, enterprise data solutions, cloud-based offerings, and application programming interfaces (APIs). These solutions support the full investment lifecycle, including research, portfolio construction, trade execution, performance measurement, risk management, and reporting.

AI capabilities are embedded across FactSet's offerings to enhance data discovery, automate routine workflows, and improve the speed and accuracy of insights.

Our Clients and Global Presence

FactSet serves clients globally through three operating regions—Americas, EMEA, and Asia Pacific—and supports a range of firm types, including Institutional Buy-Side, Dealmakers, Wealth, and Market Infrastructure. Through its CUSIP Global Services business, FactSet also provides security identifiers that support critical front-, middle-, and back-office functions across the investment industry.



FactSet At-A-Glance

FactSet delivers financial data, analytics, and open technology to help the financial community see more, think bigger, and work better.

Learn more about our solutions

Watch our latest video "Who is FactSet"

Founded in 1978

40+ Years of Consecutive Revenue Growth

25+ Years as a Public Company



S&P 500 Global Member

12K+	91%	216K+	~9K
Employees	ASV Retention	Users	Global Clients

Figures as of August 31, 2025

Our Sustainable Investment Solutions

FactSet's sustainable investment solutions are designed to support investment professionals as they assess sustainability-related factors alongside traditional financial considerations. Our approach focuses on providing high-quality data, analytics, and workflows that enable clients to incorporate sustainability information into their investment research, portfolio construction, risk management, and reporting processes.

As market practices continue to evolve, investment professionals increasingly require consistent, transparent, and decision-useful sustainability data to inform research, portfolio construction, and risk analysis. FactSet supports these needs by offering connected datasets and analytical tools that help clients understand sustainability-related risks, opportunities, and exposures across asset classes and investment strategies.



Data and Analytics to Support Informed Decision-Making

FactSet provides access to a broad range of sustainability-related data sourced from both FactSet-managed and third-party providers. These datasets are designed to offer transparency into Company-level sustainability performance, exposures, and activities, including climate- and carbon-related metrics, thematic revenue alignment, and governance indicators.

To support timely analysis, FactSet incorporates technology-enabled processes, including AI, to help surface sustainability-related signals from both structured and unstructured data sources.

These capabilities complement Company-reported information and support ongoing monitoring of sustainability-related developments that may be relevant to investment decision-making.

FactSet also supports climate- and carbon-related analysis within sustainable investment workflows through integrated analytics developed in collaboration with Emmi. These capabilities provide structured insights into carbon exposure and climate transition risk, enabling investment professionals to incorporate climate considerations alongside financial and sustainability data as part of their broader investment analysis and reporting processes.

Integration Across the Investment Workflow

Sustainable investment capabilities are embedded across FactSet's investment workflow, enabling clients to apply sustainability considerations throughout the portfolio lifecycle.

This includes:

- Research and idea generation, through access to sustainability data, thematic insights, and Company-level metrics alongside financial information
- Portfolio construction and analysis, enabling assessment of sustainability exposures, climate and carbon metrics, and alignment with investment objectives
- Risk management, including the identification and monitoring of sustainability-related risks that may have financial implications
- Reporting and disclosure, supporting internal analysis as well as external regulatory and client reporting requirements
- Sustainability data and analytics, accessible through integrated platforms and delivery options, allowing clients to apply these insights within their existing investment processes

Innovating with AI

We continue to advance a pragmatic, open, and flexible strategy for integrating AI and natural language processing into our clients' workflows, aiming to boost productivity by surfacing actionable insights throughout the portfolio lifecycle and automating routine research and content processing tasks. FactSet is delivering AI-embedded workflow solutions for various personas, including research analysts, bankers, portfolio managers, wealth advisors, and engineering teams across our clients.

AI-Enabled Platforms and Workflows

A key element of FactSet's technology strategy is the integration of new AI capabilities, such as vectorization-as-a-service at the data layer and employing agents at the platform and business solutions layers, enabling more efficient interaction with connected data and analytics. The AI data readiness layer is grounded in FactSet's connected data architecture, with a continued emphasis on data quality, transparency, evaluation, and source traceability to support informed decision-making.

Governed Access to Data for Enterprise AI Use Cases

As clients increasingly develop their own AI-enabled workflows, governed access to high-quality, real-time data has become increasingly important. FactSet supports this need through programmatic access to data and analytics via application programming interfaces (APIs), enabling clients to integrate FactSet content into their internal systems.

In 2025, FactSet introduced a production-grade Model Context Protocol (MCP) server, designed to enable AI workflows to securely access FactSet data within governed environments. This capability allows clients to connect AI tools directly to trusted datasets without custom integrations, supporting enterprise AI use cases while maintaining data governance, consistency, and reliability.

Supporting Responsible Adoption and Internal Productivity

FactSet also leverages AI-enabled tools internally to support productivity and operational efficiency. Controlled environments enable FactSetters to experiment with AI tools while adhering to internal governance standards. These tools assist teams with tasks such as code development, workflow automation, and content generation, allowing greater focus on higher-value work.







Christopher McLoughlin
Chief Legal Officer and Executive Sponsor for Sustainability

> The theme “Purpose in Motion” reflects that balance—momentum, accountability, and a clear-eyed view of what still lies ahead.

Q&A with Christopher McLoughlin

Q: How does sustainability connect to FactSet’s business strategy?

Chris: When most people hear “sustainability,” they think only in terms of environmental metrics—carbon footprints, recycling rates, net-zero targets. Those matter to us, and we report on them carefully. But we focus on much more. At FactSet, our sustainability program is about the foundations of trust that allow us to operate as a provider of critical financial data and analytics to some of the world’s largest financial institutions: data security, operational resilience, responsible AI deployment, business ethics. A client entrusting us with their data and workflows needs to know that we take those responsibilities seriously, consistently, and with the same rigor we apply to everything else. Our sustainability strategy is built around strengthening those foundations in a practical, disciplined way—and being transparent about our progress and our challenges. That means measuring what matters, disclosing what we find, and holding ourselves accountable to the commitments we make.

Q: What role does governance play in FactSet’s sustainability efforts?

Chris: Governance is central—and deliberately so. We made a conscious decision to structure our sustainability program within FactSet’s existing governance and risk management frameworks rather than creating a parallel structure. I am proud to serve as executive sponsor for this important effort. The Sustainability Committee reports through established leadership channels. Climate-related risks sit within our enterprise risk management (ERM) framework alongside other risks. That alignment matters because it means sustainability decisions are subject to the same scrutiny, accountability, and escalation processes as any other business decision. Our Board and Executive Leadership Team receive updates on sustainability priorities, regulatory developments, and progress against climate targets. The Audit Committee has oversight of climate-related risk as part of its broader risk mandate. This is not a program that sits to one side of the business—it is embedded in how the business operates.



Q&A with Christopher McLoughlin

Q: How is FactSet approaching evolving sustainability and climate-related regulations?

Chris: With discipline and a long view. The global regulatory landscape is fragmented right now—as of the date of this report, California is moving forward with mandatory climate disclosure requirements (although this is being challenged in the courts), the EU has significantly narrowed its corporate sustainability reporting rules under the recent Omnibus package, and U.S. federal direction remains uncertain. These all have different requirements, different timelines, different scopes.

Our response to this challenge is to build dynamic capabilities that allow us to be prepared for all regulatory obligations. The cloud-based data management platform we implemented this year, the DMA, and the climate risk analysis are investments in having auditable data and governance processes that will serve us regardless of how the specific regulatory requirements evolve.



Q: What does this year's Sustainability Report represent?

Chris: Honest progress. We have three matters to report this year—our first enterprise-wide DMA, a refreshed climate risk analysis, and a new emissions platform that materially strengthens our data quality. Those are real steps forward for which we are all proud.

We are also honest about where we have more work to do. For example, Scope 3 emissions remain a key challenge—the 5% reduction achieved against an 8% pathway target tells us that we have work to do.

The theme "Purpose in Motion" reflects that balance—momentum, accountability, and a clear-eyed view of what still lies ahead.



Our Approach to Sustainability

- Stakeholder Engagement
- Sustainability Governance and Oversight
- Materiality Assessment

Stakeholder Engagement

FactSet engages with internal and external stakeholders through formal and informal channels, including internal leadership discussions, employee surveys, customer interactions, and external research, to inform sustainability strategy and priorities. During FY25, stakeholder input played a key role in FactSet's Double Materiality Assessment. Insights from enterprise leadership and functional subject matter experts across procurement, risk management, legal and compliance, human resources, operations, finance, product, and data privacy and cybersecurity were incorporated into the assessment process. External perspectives, including peer practices and regulatory expectations, were also considered to provide broader context.

FactSet's stakeholder engagement is an ongoing process. Feedback and insights gathered through engagement activities inform sustainability strategy, program development, and disclosure and help ensure that reporting remains relevant, decision-useful, and aligned with evolving expectations.



Sustainability Governance and Oversight

FactSet's sustainability governance is supported through defined leadership oversight and cross-functional coordination structures that guide our priorities and program execution across the organization.

Board and Executive Leadership Team (ELT)

FactSet's Board of Directors ultimately oversees our overall strategy. The Board's Nominating and Corporate Governance Committee (NomGov) is responsible for reviewing the Company's actions in furtherance of its corporate social responsibility, including considering the impact of the Company's business operations, procedures, and processes on employees, stockholders, citizens, and communities.

The CEO engages in enterprise-level strategy discussions with the ELT, with sustainability-related considerations incorporated where relevant. The Chief Legal Officer (CLO) serves as executive sponsor for the FactSet sustainability program and provides updates to the Board, Audit Committee, and NomGov on regulatory and sustainability developments and other pertinent matters such as operational resilience, disaster recovery, and cybersecurity.

Sustainability Steering Committee

We also have a Sustainability Steering Committee, which plays an important role in guiding the Company's sustainability efforts and supporting implementation across the organization, including the items set out in the Double Materiality Assessment. The Committee provides a forum for cross-functional alignment, monitors progress on key initiatives, and considers emerging sustainability topics relevant to the business.

To support focused engagement and execution, the Sustainability Steering Committee is supported by two subcommittees:

- **Environment and Climate Subcommittee:** This subcommittee focuses on environmental topics, including greenhouse gas (GHG) emissions, climate-related initiatives, and other environmental considerations relevant to FactSet's operations.
- **Employee Commitment Subcommittee:** This subcommittee focuses on employee-related initiatives, including engagement, well-being, and programs that support FactSet's broader sustainability objectives.

Materiality Assessment

FactSet completed its most recent sustainability double materiality assessment (DMA) in 2025 with support from an independent third-party consultant. A DMA is a structured process used to identify and prioritize sustainability topics that are material both from an impact perspective (how the Company affects people and the environment) and from a financial perspective (how sustainability-related risks and opportunities may affect the Company's business and long-term value creation).

The assessment helps guide FactSet's sustainability approach and supports alignment with evolving global regulatory expectations. The sustainability materiality assessment is distinct from FactSet's financial materiality processes used for statutory financial reporting.

FactSet identified actual and potential, positive and negative sustainability-related impacts, as well as financially relevant risks and opportunities, through a combination of desktop research on peers, customers, and regulatory developments and interviews with subject matter experts across different functions within the organization. Topics were assessed across FactSet's direct operations and value chain and evaluated over short-, medium-, and long-term time horizons. Topics were evaluated on severity (scale, scope, reversibility) for impact materiality and on potential financial exposure and likelihood for financial materiality, aligned with FactSet's ERM framework.

Topics that exceeded FactSet's defined sustainability materiality thresholds were identified as material. FactSet's material topics are presented below and include sustainability topics that are impact material, financially material, or both. These topics provide a structured basis for prioritization and disclosure across this report.

Material Topics:

- Data Privacy + Cybersecurity
- Business Ethics
- AI Governance
- Climate Change Management
- Employee Learning + Development
- Talent Engagement





Awards and Recognitions

FactSet participates in a number of external sustainability assessments and rating processes conducted by independent organizations, each using its own methodologies and criteria.

ECOVADIS
FactSet is regularly assessed by EcoVadis and scored within the 60th percentile of companies evaluated for corporate sustainability practices in 2025.

MSCI ESG RESEARCH
FactSet maintains a AAA rating, the highest rating awarded by MSCI, placing the Company in the top 16% of the Diversified Financials industry.

CDP
FactSet received a C rating for the 2025 climate change disclosure, reflecting our current stage of emissions data maturity. Our transition to a cloud-based emissions platform this year strengthens the data foundation for improved disclosure in future cycles.

ISS ESG
FactSet maintains an ISS ESG Corporate Rating of “Prime,” indicating fulfillment of ISS ESG’s sector-specific criteria.

SUSTAINALYTICS
FactSet is rated Low Risk under Sustainalytics’ ESG Risk Rating.



Environmental Stewardship

- Climate Strategy and Risk Management
- Greenhouse Gas Emissions and Reduction Targets
- Waste Management

Climate Strategy and Risk Management

Climate Risk Assessment

FactSet periodically assesses climate-related physical and transition risks across short-, medium-, and long-term time horizons. In early 2026, FactSet completed an updated climate risk assessment and scenario analysis covering a range of potential future pathways, including multiple physical and transition scenarios aligned with widely recognized climate frameworks. The assessment considered both:

- **Physical risks**, including acute events such as storms and flooding, as well as chronic trends such as rising temperatures and water stress; and
- **Transition risks**, including policy and regulatory developments, energy and technology shifts, market expectations, and reputational considerations.

Risks were evaluated using a combination of qualitative and quantitative inputs, aligned with FactSet's ERM impact and likelihood frameworks where applicable.

Key Findings

Overall, FactSet's climate-related physical and transition risks are assessed as not material to the Company's business model, strategy, or financial position across time horizons, given FactSet's operating model, geographic footprint, and existing governance and risk management practices.

From a physical risk perspective, the majority of FactSet's global locations were assessed as having low or very low exposure across modeled scenarios.



Certain offices in Southeast Asia exhibit comparatively higher exposure to acute climate hazards including typhoons and flooding. These risks are managed through established business continuity planning, facilities monitoring, and engagement with landlords to support site-level resilience and employee safety.

Transition risks are primarily associated with evolving regulatory expectations, energy performance standards for leased properties and data centers, energy cost volatility, and increasing stakeholder expectations related to climate transparency. While these risks are not material, they underscore the importance of continued focus on energy efficiency, emissions management, and disclosure readiness as part of responsible business operations.

Climate-Related Opportunities

The assessment also identified climate-related opportunities across operations and products. These include opportunities to improve energy efficiency and renewable energy sourcing, enhance operational continuity, and respond to any client demand for sustainability- and climate-related data and analytics.

Integration with Enterprise Risk Management

Insights from FactSet's climate risk assessments are integrated into the Company's ERM processes and support business continuity, sustainability planning, and sustainability priorities. Climate-related risks are monitored over time and revisited as assumptions, regulations, and operating conditions evolve.

Greenhouse Gas Emissions and Reduction Targets

Our Approach to Emissions Measurement

FactSet is committed to maintaining a transparent greenhouse gas (GHG) emissions inventory that supports regulatory readiness and progress toward our climate commitments. Our approach emphasizes methodological consistency across reporting periods, comparability over time, and alignment with evolving best practices for corporate GHG accounting.

Emissions Methodology Update and Restatement (FY23–FY24)

To improve comparability and auditability of our greenhouse gas inventory, FactSet updated its emissions measurement methodology beginning in FY25 and recalculated FY23 and FY24 emissions using the same approach. This update included a transition from a primarily Excel-based calculation process to a centralized, cloud-based emissions accounting platform, enabling more standardized calculations, stronger controls, and improved traceability across data sources and methodologies.

As part of this transition, FactSet compared outputs from the prior Excel-based approach with results generated under the updated cloud-based methodology and identified differences in reported totals. On a total basis, FY23 emissions under the updated methodology are 23% higher than the prior estimate, and FY24 emissions are 20% higher. This reflects improved methodology and coverage, not errors in prior data. Key drivers of these changes include the use of country-specific data from the Comprehensive Environmental Data Archive (CEDA), refined energy conversion methodologies for certain purchased energy types, and enhanced activity-level inputs where more granular data became available.

As a result, FY23–FY25 emissions calculated under the updated methodology represent FactSet's reference footprint going forward and provide a consistent basis for tracking progress against our near-term climate targets, which use FY23 as the baseline year. FactSet's FY23–FY25 emissions under the updated methodology have been subject to third-party validation, and the corresponding assurance statements are available on FactSet's sustainability website.





Greenhouse Gas Emissions and Reduction Targets

Greenhouse Gas Emissions Overview

FactSet reports GHG emissions across Scope 1 (direct emissions), Scope 2 (indirect emissions from purchased energy), and Scope 3 (other indirect emissions across the value chain), in accordance with the Greenhouse Gas Protocol. Scope 3 emissions represent the largest share of our footprint, reflecting the nature of our business model, which relies on purchased goods and services from global suppliers, cloud services, and business travel. Scope 1 and Scope 2 emissions primarily relate to building energy use, chilled water, and Company-owned vehicles.

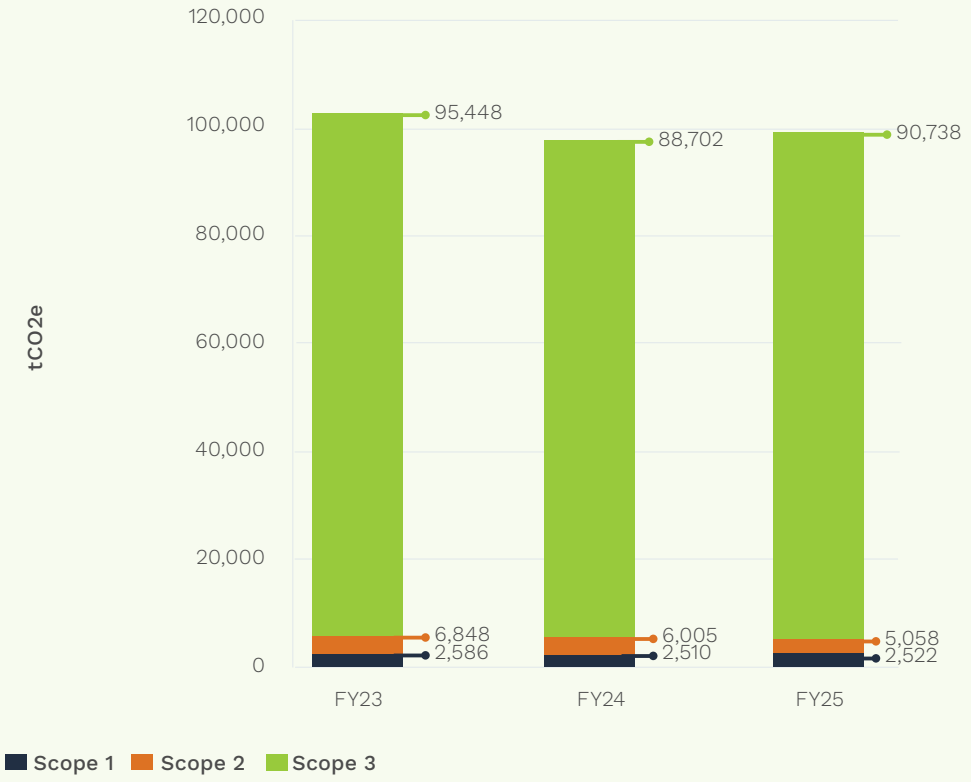
TABLE 1: GREENHOUSE GAS EMISSIONS BY SCOPE (FY23–FY25) IN tCO2e

Scope	FY23	FY24	FY25
Scope 1	2,586	2,510	2,522
Scope 2 (market-based)	6,848	6,005	5,058
Scope 3	95,448	88,702	90,738
Total (Scopes 1–3)	**104,882**	**97,217**	**98,318**

TABLE 2: FY25 ENERGY CONSUMPTION

Scope of Emissions	Data Source	Consumption (MWh)
Scope 1	Mobile combustion	10,009
	Stationary combustion	615
Scope 2	Electricity	17,589
	Purchased chilled water	14,431

FIGURE 1: FY23–FY25 GHG EMISSIONS TREND



Scope 3 Emissions Profile

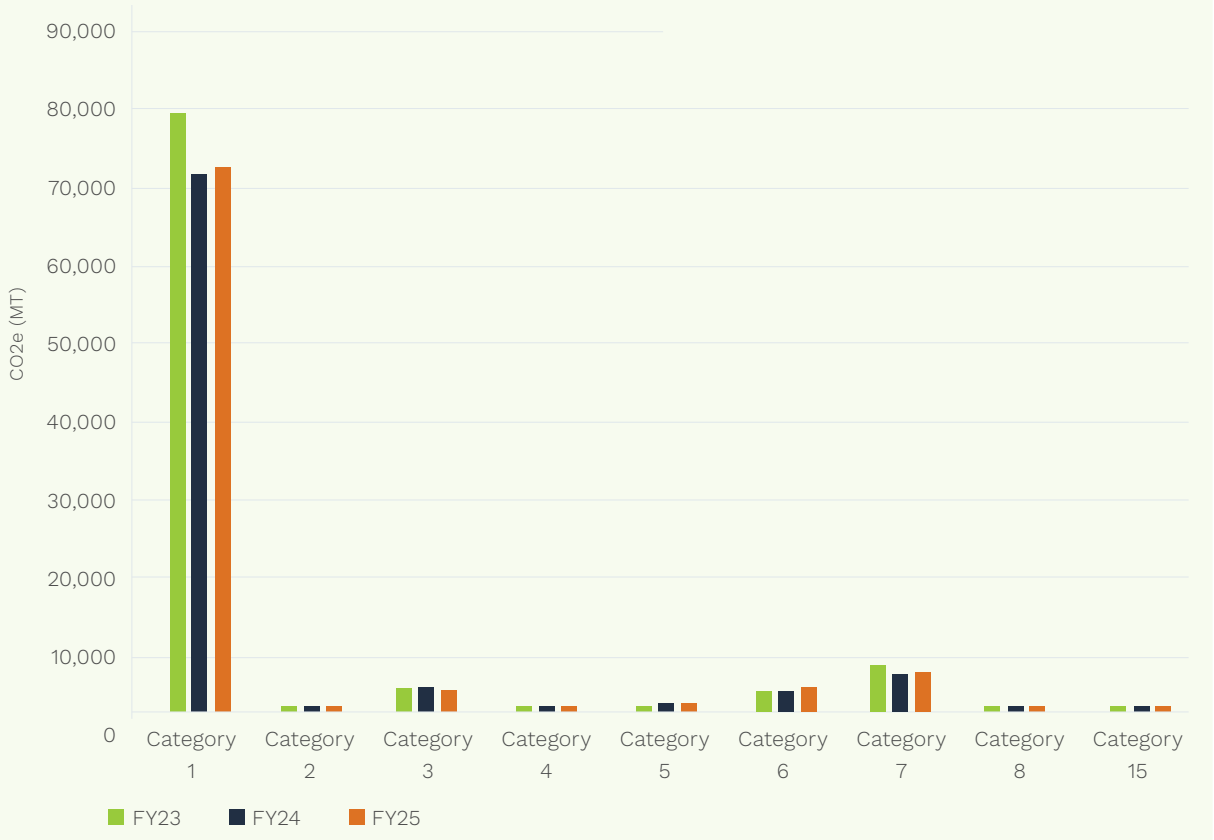
Scope 3 emissions account for the majority of FactSet's total emissions and are primarily driven by purchased goods and services, business travel, employee commuting, and upstream energy-related activities. Changes across categories reflect a combination of activity levels, emissions factor updates, and underlying business dynamics.

Purchased goods and services are the largest single category, consistent with our service-based model. Business travel and commuting increased modestly in FY25 due to higher travel volumes and workforce growth; fuel- and energy-related activities declined in line with reduced building energy demand.

TABLE 3: SCOPE 3 EMISSIONS BY CATEGORY (FY23–FY25) IN tCO2e

Scope 3 Category	FY23	FY24	FY25
Category 1: Purchased Goods and Services	77,805	71,840	73,301
Category 2: Capital Goods	427	96	128
Category 3: Fuel- and Energy-Related Activities	4,472	4,478	4,281
Category 4: Upstream Transportation and Distribution	101	88	57
Category 5: Waste Generated in Operations	1,288	1,385	1,439
Category 6: Business Travel	3,885	3,991	4,377
Category 7: Employee Commuting	7,363	6,691	7,024
Category 8: Upstream Leased Assets	50	49	57
Category 15: Investments	57	84	74
Total Scope 3	95,448	88,702	90,738

FIGURE 2: FY23–FY25 SCOPE 3 EMISSIONS BY CATEGORY



Emissions Reduction Targets

FactSet has established both long-term and near-term emissions reduction targets to guide our decarbonization efforts.

Target:

Achieve net-zero Scope 1 and Scope 2 emissions by 2040

Reduce absolute Scope 1 and Scope 2 GHG emissions by 45% by FY30 from FY23 base year (SBTi-approved)

Reduce absolute Scope 3 GHG emissions by 25% by FY30 from FY23 base year (SBTi-approved)

Progress Toward SBTi Targets

During FY25, FactSet continued to make progress toward its near-term approved science-based targets, using FY23 as the baseline year.

Combined Scope 1 and Scope 2 (market-based) emissions declined by approximately 20% between FY23 and FY25, reflecting continued improvements in building energy efficiency, reduced chilled water consumption in key locations, and ongoing procurement of renewable electricity.

Individually, Scope 1 emissions declined by approximately 2%, primarily due to reduced fuel use from Company vehicles, while Scope 2 (market-based) emissions declined by approximately 26%, driven largely by lower chilled water usage and energy efficiency initiatives.

Scope 3 emissions declined by approximately 5% relative to the FY23 baseline. This is below our 8% pathway target for this period. Increases in business travel and workforce-related activities partially offset reductions in purchased goods and services.

Decarbonization Strategy and Ongoing Work

- **Scope 1 and Scope 2:** Current efforts are centered on assessing building-related emissions, particularly heating and chilled water, alongside continued use of renewable electricity and ongoing real estate optimization where possible.
- **Scope 3:** FactSet has identified key upstream categories, including purchased goods and services and supplier electricity use, as areas of focus based on emissions modeling.
These insights can inform future engagement and prioritization efforts, recognizing that background decarbonization alone is unlikely to deliver sufficient reductions to meet long-term targets.

Renewable Energy and Green Buildings

FactSet continues to procure renewable electricity to reduce market-based Scope 2 emissions and support progress toward its net-zero commitment. In parallel, it emphasizes energy-efficient and sustainable buildings across its global footprint.

Of FactSet's 35 global offices, 14 buildings have obtained LEED or LEED-equivalent certifications (such as BREEAM), reflecting its continued focus on operational efficiency.



Case Study



LONDON OFFICE

Retrofit Embedding Sustainability into the Workplace

FactSet's London office retrofit reflects our focus on integrating sustainability, efficiency, and employee experience into workplace design. With one floor completed and additional space scheduled to open in 2026, the project prioritizes responsible sourcing, operational efficiency, and long-term performance.

Materials and furnishings were selected with environmental credentials in mind, including the use of locally sourced UK materials and durable European products to reduce lifecycle impacts and support responsible procurement. Flexible layouts and modern collaboration spaces are designed to maximize space efficiency while supporting hybrid work and evolving business needs.

The office retrofit coincides with a broader, landlord-led building upgrade program focused on improving energy performance through the replacement of base building systems. Planned enhancements include more efficient mechanical systems and shared amenities designed to serve all tenants, contributing to reduced operational energy use over time.

Together, the office-level improvements and building-wide upgrades support lower-carbon operations while providing a modern, functional workspace aligned with FactSet's sustainability and resilience objectives.



PARIS OFFICE

Advancing Energy Performance and Sustainable Design

FactSet's Paris office at 32 Rue Blanche demonstrates how collaboration with building partners can drive measurable sustainability outcomes. Following FactSet's relocation in 2023, the building owner completed a comprehensive renovation program in FY25 that reduced overall building energy consumption by approximately 10%.

The building now holds a BREEAM "Excellent" certification, reflecting strong performance across energy efficiency, environmental management, and occupant well-being. Upgrades to building systems and shared infrastructure support lower energy use while maintaining high standards of connectivity, comfort, and functionality.

The renovated workspace combines efficient design with amenities that promote productivity and collaboration, reinforcing FactSet's commitment to sustainable, people-centered workplaces. The Paris office continues to serve as an example of how energy performance improvements at the asset level can support broader operational sustainability goals.

Waste Management

FactSet seeks to minimize waste across its global operations through reduction, reuse, and recycling, with landfill diversion as the primary objective.

Electronic Waste (E-Waste) and Equipment Reuse

Electronic equipment is reused, resold, or recycled through certified third-party vendors, with landfill disposal as a last resort. All devices are securely wiped prior to disposal in accordance with data protection requirements. End-of-life furniture in good condition is offered to employees or local nonprofits before decommissioning.

FactSet works with certified third-party vendors to manage e-waste in accordance with applicable regulations, including the responsible handling of hazardous components to prevent environmental contamination.

Waste Metrics

Total waste increased from 2,924 to 3,143 metric tons between FY23 and FY25, while the diversion rate remained flat at 13%. We are reviewing opportunities to improve diversion performance across key office locations. This includes ongoing engagement with facility partners to improve recycling infrastructure and waste segregation practices.

TABLE 4: WASTE METRICS IN METRIC TONS

Material Waste (MT)	FY25	FY24	FY23
Landfilled	2,776	2,682	2,583
Recycled	367	354	341
Total Waste	3,143	3,036	2,924









Our People & Communities

- Talent Engagement
- Inclusion and Belonging
- Employee Learning and Development
- Community Impact

Talent Engagement

Enabling Performance Through People

At FactSet, our people are central to delivering long-term value to our clients, stockholders, and communities in which we live and work. We view human capital as a strategic asset and prioritize the health, engagement, safety, and well-being of our workforce.

FactSet's human capital strategy aligns our workforce with our mission through strategic hiring, focused upskilling, transparent career pathways, and comprehensive well-being programs. By emphasizing innovation, agility, recognition, and inclusion, we foster a culture where FactSetters are equipped, empowered, and motivated to deliver outcomes for our clients, communities, and shareholders.

Our Employees

As of August 31, 2025, we had 12,800 employees across 35 offices in 20 countries, an increase of 3.24% from 2024. Our global centers of excellence in India and the Philippines account for approximately 68% of our workforce and are central to our operational scale and delivery capability.

Functionally, as of August 31, 2025, 48% of employees were in Content Operations, 27% in Technology and Product Development, 21% in Sales and Client Solutions, and 4% in Corporate Support across the globe. In addition, 433 employees were represented by mandatory works councils in France and Germany, and 24 employees were covered by collective bargaining agreements in the United States.

Our global workforce enables scale, operational efficiency, and the delivery of specialized expertise across the enterprise.







TABLE 5: GLOBAL WORKFORCE BY REGION

Region	Number of Employees	Percentage
Americas	2,510	19.6%
Asia Pacific	312	2.4%
EMEA	1,436	11.2%
India	5,502	43.0%
Philippines	3,040	23.8%
Grand Total	**12,800**	**100%**

TABLE 6: GLOBAL WORKFORCE BY AGE

Age Group	Number of Employees	Percentage
21-30	6,815	53.2%
31-40	3,753	29.3%
41-50	1,524	11.9%
51-60	560	4.4%
61-64	84	0.7%
65 and Over	19	0.1%
Undisclosed	45	0.4%
Grand Total	**12,800**	**100%**

TABLE 7: CONTINGENCY EMPLOYEES

Region	Number of Employees	Percentage
Americas	143	23.3%
Asia Pacific	3	0.5%
EMEA	207	33.7%
India	228	37.1%
Philippines	33	5.4%
Grand Total	**614**	**100%**

TABLE 8: EMPLOYEE TURNOVER

Org	HC	Hires	Hire Rate	Turnover	Turnover Rate
FactSet Total	12,800	1,842	14.6%	1,360	10.8%
Americas	2,510	345	14.1%	196	8.0%
Asia Pacific	312	55	17.8%	47	15.2%
EMEA	1,436	170	12.0%	102	7.2%
India	5,502	762	14.1%	560	10.4%
Philippines	3,040	510	16.9%	455	15.0%



Employee Engagement

FactSet fosters a culture where employees feel empowered, recognized, and connected to the Company's mission. Key initiatives and outcomes include:

- **Engagement and Feedback:** We conduct an annual confidential employee engagement survey to assess satisfaction, gather feedback, and identify opportunities for improvement. In FY25, our engagement survey achieved an 88% response rate, significantly outpacing the third-party benchmark of 75%, and reflecting strong employee engagement. Employees indicated strong alignment with the Company's purpose and confidence that their work adds value.
- **Corporate Responsibility and Purpose:** In FY25, FactSetters contributed 17,200 volunteer hours across 391 events, with more than 85% of FactSetters participating in philanthropic initiatives focused on education, hunger alleviation, environmental protection, and disaster response.
- **Flagship Initiatives:** Programs such as Hunger Awareness, one of FactSet's largest annual initiatives, have resulted in over 9 million meals donated since 2019, with support from the FactSet Charitable Foundation, reinforcing a culture of purpose while enhancing employee engagement and collective impact.
- **Employee-Led Engagement Programs:** FactSet supports a network of site-level culture committees, business resource groups, and wellness champions, empowering FactSetters to drive inclusion, well-being, and local engagement initiatives. These programs foster connection, collaboration, and a sense of camaraderie across teams and geographies.

Well-Being and Employee Support

- **Comprehensive Health and Wellness Programs:** In FY25, we expanded mental health resources through a global platform providing access to on-demand clinical experts, confidential counseling, and personalized wellness content. Since its launch, 25% of FactSetters have engaged with the platform, significantly higher than the 4% to 6% engagement typically observed with standard Employee Assistance Programs, demonstrating the platform's effectiveness in supporting employee well-being.
- **Flexible Work Arrangements:** Policies and programs support work-life integration, including remote and hybrid work options, parental leave, and time-off programs tailored to employee needs.

Compensation and Pay Equity

Competitive and transparent compensation practices are an important component of FactSet's talent strategy. When setting compensation, we consider factors such as role scope, market benchmarks, Company performance, and individual contributions.

All employees participate in a regular performance review process to assess goals, development needs, and impact, which informs compensation decisions and supports equitable and consistent outcomes across the organization.

FactSet conducts bi-annual pay equity assessments to evaluate compensation across our global workforce. The most recent assessment, completed in fiscal 2024, found no statistically significant difference between pay and gender on a controlled basis — globally, women are paid on average more than 99% of what men are paid for comparable roles.

Health and Safety

Employee health and safety remain priorities at FactSet. We maintain an Occupational Health and Safety Policy and conduct regular risk assessments to help identify and mitigate workplace hazards. Employees are encouraged to report unsafe conditions, reinforcing a culture of shared responsibility.





Inclusion and Belonging

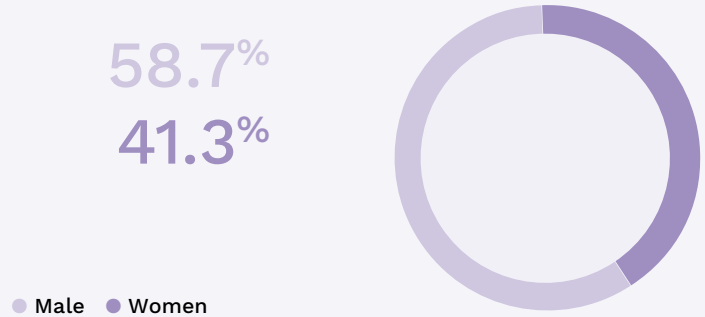
Our Approach and Focus Areas

At FactSet, inclusion and belonging are embedded in how we hire, develop, and support our people globally. Our approach is structured around two focus areas: Workforce and Society. We believe that different perspectives, experiences, and ways of thinking strengthen decision-making, innovation, and long-term performance.

Workforce

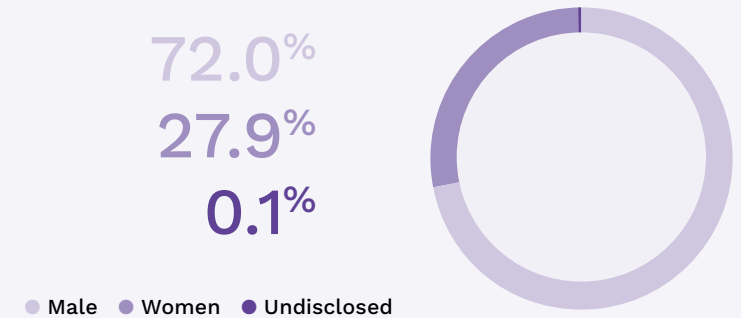
FactSet is committed to cultivating a workplace that champions fairness, opportunity, and a sense of belonging across our global workforce.

FIGURE 3: GLOBAL WORKFORCE BY GENDER



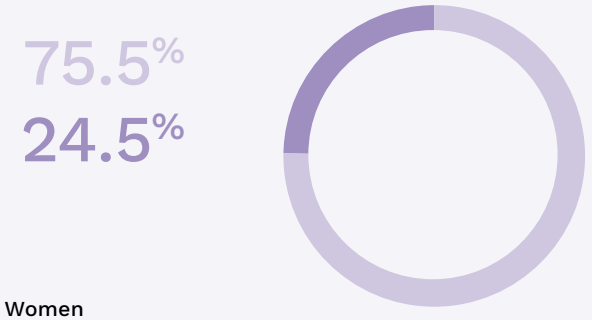
Gender	Employees	Percent
Male	7,509	**58.7%**
Female	5,287	**41.3%**
Undisclosed	4	**<0.1%**
Grand Total	**12,800**	**100%**

FIGURE 4: GLOBAL LEADERSHIP BY GENDER



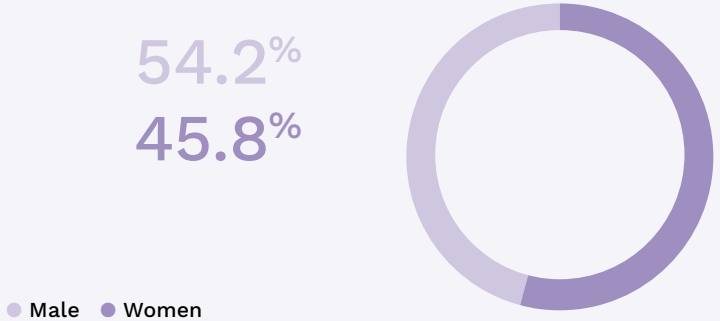
Gender	Employees	Percent
Male	1,035	**72.0%**
Female	401	**27.9%**
Undisclosed	1	**0.1%**
Grand Total	**1,437**	**100%**

FIGURE 5: GLOBAL TECH EMPLOYEES BY GENDER



Gender	Tech Employees	Percent
Male	2,015	**75.5%**
Female	654	**24.5%**
Undisclosed	1	**<0.1%**
Grand Total	**2,670**	**100%**

FIGURE 6: GLOBAL NON-TECH EMPLOYEES BY GENDER



Gender	Non-Tech Employees	Percent
Male	5,494	**54.2%**
Female	4,633	**45.8%**
Undisclosed	3	**<0.1%**
Grand Total	**10,130**	**100%**

Society

FactSet's approach to inclusion and belonging also encompasses engagement with the communities where we operate. Through corporate partnerships, charitable initiatives, and employee volunteer efforts, we support organizations and programs that contribute to social inclusion and community development across regions.

These activities are designed to reflect local priorities and enable FactSetters to engage meaningfully in the communities where they live and work.

Business Resource Groups

Business Resource Groups (BRGs) play an important role at FactSet. These employee-led networks are open to all FactSetters and provide opportunities for connection, learning, and leadership development.

In FY25, BRGs continued to drive inclusive programming throughout the regions. These efforts fostered an engaging environment where employees feel valued, supported, and empowered to excel and build meaningful careers.



Learning and Development

Our Approach to Employee Learning and Development

FactSet's Learning and Development team, supported by Learning Business Partners across functions, focuses on skills development aligned to business priorities:

- **Future-Ready Skills:** In FY25, 94% of employees participated in learning programs, completing 338,000 hours globally. Programs include mentorship, leadership development, department-specific training, and the EXCEL program, which supports external certifications in areas such as financial analysis, cloud engineering, and project management.
- **AI Capabilities:** A major focus was on building AI capabilities aligned with FactSet's innovation and AI monetization goals. Employees advanced skills in prompt engineering, coding, vector databases, and data querying, enabling teams to embed AI across product design, client solutions, and internal efficiency initiatives.
- **Career Pathways:** So that employees can apply their skills toward long-term careers at FactSet, we refreshed our job architecture, providing transparent career pathways and consistent role expectations across functions. By linking learning and growth opportunities to FactSet's business priorities, we strengthen engagement, retention, and overall business performance.

Building Skills at the Moment of Need Through Microlearning and AI

In 2025, microlearning formats saw increased engagement, with AI-powered chat tools used to create internal knowledge bases enabling conversational, on-demand learning. Access to AI-enabled coaching was expanded through LinkedIn Learning and internal tools.





TABLE 13: EMPLOYEE LEARNING HOURS – GLOBALLY

Training Type	Hours (FY25)	Hours (FY24)	Hours (FY23)
Continuing Education – Live Training	39,836	43,025	67,427
Continuing Education – Digital Learning	217,325	247,903	129,503
Campus Onboarding Programs	80,405	106,666	149,658
Total	**338,092**	**397,594**	**346,589**
Avg Training Hours Per Employee	22.5	28.5	24.5

Community Impact

Corporate Responsibility

At FactSet, our commitment to responsible corporate citizenship is guided by four core Pillars of Service: education, hunger alleviation, environmental protection, and disaster response.

Through employee volunteerism, support of the FactSet Charitable Foundation, and targeted charitable giving, we drive meaningful impact across these areas. These combined financial efforts help expand access to education, address food insecurity, support environmental sustainability through initiatives such as tree planting, and enable rapid response to global emergencies. By aligning our resources with the passion of our global FactSetter community, we aim to deliver measurable and lasting impact.

Rooted in Well-Being: FactSetters Boost Engagement and Plant 30,000 Trees

As part of our Be Well with Nature campaign, employees are encouraged to support both personal well-being and environmental sustainability. In FY25, more than 1,700 FactSetters completed over 11,000 well-being activities—a 57% increase in engagement year over year—resulting in approximately 30,000 trees planted through a global reforestation partner. Since the campaign's launch in 2021, more than 111,000 trees have been planted, with support from the FactSet Charitable Foundation.



Volunteer Highlights

391
Volunteer Events

17.2K
Volunteer Hours

85%
of FactSetters engaged in the CR program through volunteering, financial giving, completed challenges, and Learn for a Cause, an annual campaign where every hour of employee learning generates four meal donations.

Spotlight on Our Volunteers of the Year

Our global Volunteers of the Year Award recognizes and honors outstanding FactSet volunteers for their extraordinary service and dedication to FactSet's Corporate Responsibility program, our charity partners, and our communities.

Nominations are made by CR Committees worldwide. Our winners significantly contribute to a FactSet cause area through behaviors such as commitment, service, creativity, cooperation, and leadership in their volunteer roles.

> Volunteering has been a meaningful part of my life since university, providing me with energy and perspective. Discovering FactSet's programs has been especially motivating—it feels rewarding to give back and see the positive impact even small acts can have on the community.

Allan
2025 Volunteers of the Year honoree from the Riga, Latvia office.

The FactSet Charitable Foundation

Empowering Future Tech and Finance Leaders

FactSet established the FactSet Charitable Foundation in 2021. The Foundation supports pathways for under-resourced young people to gain critical skills, access higher education, and pursue employment opportunities in technology and finance through job-specific training, mentorship, and exposure to professional networks that help bridge gaps in experience and improve workforce readiness.
Through FY25, the Foundation has invested in 12 initiatives across six countries, supporting both direct programming and the scaling of existing initiatives.

Outcomes from the Foundation's investments through two years:

1,500
young people helped through transformative programming

89%
of participants gained valuable skills

97%
of eligible participants advanced to higher education

89%
of eligible participants moved into quality employment*

8,800
individuals benefited from enhanced programming as part of our scaling grants

* Quality employment means work that is dignified, secure, fairly compensated, and supportive of both current and future well-being.







Governance & Responsible Business

- Business Ethics
- Enterprise Risk Management and Governance
- Data Privacy and Cybersecurity
- AI Governance
- Supply Chain Management

Business Ethics

Code of Business Conduct and Ethics

FactSet's Code of Business Conduct and Ethics (the Code) sets out the standards of behavior expected of all directors, officers, employees, contractors, and temporary workers while engaged in work for FactSet. The Code applies globally, is posted on our public website, and is made available to employees in seven languages to support engagement and understanding across our diverse workforce.

The Code addresses key areas, including ethical decision-making, compliance with laws and regulations, conflicts of interest, fair competition, protection of Company assets, data privacy and security, and respectful workplace behavior. It is reviewed periodically and updated as needed to reflect evolving legal requirements, regulatory expectations, and business practices.

All personnel are required to complete regular Code training and provide an annual certification confirming their understanding of and commitment to compliance with the Code. In FY25, 97% of personnel completed the annual certification. The remaining 3% includes employees on maternity leave or other extended leaves of absence and personnel whose engagement with FactSet was nearing completion, in addition to a small percentage of employees who failed to complete the requirement without clear justification. Failure to complete the annual certification is documented in employees' personnel records.

Speaking Up and Raising Concerns

FactSet encourages employees and other stakeholders to raise concerns or ask questions when they observe or suspect behavior that may be inconsistent with our policies, values, or legal obligations. We believe a strong speak-up culture is essential to maintaining trust and accountability.

Concerns may be raised through multiple channels, including contacting management, Human Resources, or the Legal or Compliance teams directly, or through the Ethics Action Line. The Ethics Action Line is available 24 hours a day, seven days a week, in multiple languages, and allows for anonymous reporting where permitted by local law.

FactSet maintains a Whistleblower and Anti-Retaliation Policy that prohibits retaliation against individuals who raise concerns in good faith. All reports are reviewed and addressed appropriately, and confirmed violations may result in disciplinary or corrective action, regardless of role or seniority.

Ethics Awareness and Training

Ongoing education and awareness are central to supporting ethical behavior across FactSet. Training on our Code of Business Conduct and Ethics is integrated into onboarding and reinforced through periodic refresher training and communications.

In FY25, FactSet hosted Ethics Awareness Week to underscore the importance of ethical decision-making in business operations. The event featured fireside chats with business leaders, training on ethical decision-making and the responsible use of artificial intelligence, and the release of the annual SpeakUP Report. The SpeakUP Report provides transparency into the types of concerns and questions raised by FactSetters in the previous fiscal year, reinforcing FactSet's commitment to fostering a culture of integrity and open communication.

Fair Business Practices and Anti-Corruption

FactSet maintains a zero-tolerance approach to bribery and corruption. Our Anti-Bribery and Anti-Corruption Policy prohibits offering, giving, soliciting, or accepting bribes, kickbacks, or other improper payments, including facilitation payments, in any form.

We also maintain policies governing gifts and entertainment, conflicts of interest, political activities, and accurate recordkeeping. These policies are designed to prevent improper influence and ensure transparency in business dealings.

Employees are expected to avoid situations that could create actual or perceived conflicts of interest and to disclose potential conflicts in accordance with Company policy.

Human Rights

FactSet recognizes the importance of respecting human rights and is committed to conducting business in a manner that upholds human dignity. Our Human Rights Policy reflects this commitment and is informed by internationally recognized frameworks, including the UN International Bill of Human Rights, the UN Global Compact, and the International Labour Organization's Declaration on Fundamental Principles and Rights at Work.

We prohibit discrimination, harassment, forced labor, child labor, and human trafficking, and expect our suppliers and business partners to uphold similar standards, as articulated in our Supply Chain Code of Conduct. We also reaffirm our Modern Slavery Act statement.

TABLE 14: SALIENT HUMAN RIGHTS ISSUES

Salient Human Rights	Relevant Rights Holders	Relevant Activities
Right to safe and healthy working conditions	Employees, suppliers	Employee well-being initiatives; Supply Chain Code of Conduct
Right to freedom of association, assembly and collective bargaining	Employees, suppliers	Policy adherence
Right to non-discrimination in employment and occupation	Employees, suppliers	Policy adherence; training programs; grievance committees
Right to adequate standard of living	Employees, suppliers	Fair compensation policies

Political Activities

FactSet supports the right of individuals to participate in the political process. In line with our Political Engagement Policy, FactSetters may engage in political activities as private citizens, on their own time and at their own expense, and in compliance with applicable laws, including campaign finance regulations. Employees may not use FactSet funds, facilities, or other corporate resources to support a political candidate, party, or campaign unless expressly authorized.

FactSet does not make political contributions to political campaigns, candidates, political parties, or political action committees and does not provide corporate resources in support of, or in opposition to, ballot initiatives. FactSet made no political contributions during FY25.

FactSet continues to monitor evolving laws and regulatory requirements related to political activities to help ensure ongoing compliance across jurisdictions.

Enterprise Risk Management and Governance

Board and Committee oversight of risk management operates within the governance framework described in the Sustainability Governance and Oversight section. The Executive Risk Committee, comprised of all members of the Executive Leadership Team, has day-to-day responsibility for identifying key risks, formulating risk management policies, and setting the appropriate tone at the top.

Enterprise Risk Management

FactSet maintains a dedicated ERM function, reporting to the Chief Compliance Officer and Head of Enterprise Risk Management designed to identify, assess, and monitor the key risks that could impact FactSet's strategic objectives.

The ERM team supports management-level risk owners and other business leaders to help ensure adequate mitigation plans exist to address key risk exposures. The ERM team delivers regular updates to the ELT and the Audit Committee.

Emerging Risks

FactSet operates in a dynamic global environment where emerging risks can influence long-term performance and resilience. These risks are monitored through our ERM processes and broader governance structures.

Key emerging risks include cybersecurity and data protection; technological change, including the use of artificial intelligence tools; evolving market demand and competitive dynamics; legal, regulatory, and geopolitical developments; and broader financial market conditions.

For additional information on risks that may affect our business and financial performance, please refer to Item 1A, "Risk Factors," in our 2025 Annual Report on Form 10-K.

Integration with Sustainability and Compliance

Enterprise risk management is closely connected to FactSet's broader compliance, sustainability, and governance activities. Relevant risks, including those related to regulatory compliance, data governance, and ethical conduct, are incorporated into our risk assessment processes and reviewed alongside other risks.



Data Privacy and Cybersecurity

Governance and Oversight

Data privacy and cybersecurity are integrated into FactSet's governance and risk management practices through clear oversight structures and defined accountability. Cybersecurity is an important part of the Audit Committee, Board of Directors, and Executive Leadership Team's risk management focus. The Board coordinates with the Audit Committee to provide active Board- and Committee-level oversight of the Company's technology and cyber risk profile, cyber crisis management strategies, and information security initiatives.

The Audit Committee monitors management's risk oversight activities, including those pertaining to cybersecurity risks. The Audit Committee receives regular updates from the Chief Information Security Officer (CISO) regarding trends, emerging risks to FactSet's technology infrastructure, updates on security assessments and the threat landscape, and the steps being taken to respond to these matters. The CISO also provides an annual update to the Board, or more frequently as appropriate.

Management is responsible for identifying FactSet's key risks, managing risk exposures, and clearly communicating their significance and priority across the organization. As part of this responsibility, the ERM and Technology Teams, including the CISO, deliver regular updates to the ELT on cybersecurity and related matters.

Data Privacy

FactSet places a high priority on protecting the privacy and data protection rights of stakeholders, including clients, employees, and partners. We continue to evolve our privacy practices to respond to client expectations and regulatory requirements and to support the appropriate handling of personal data across the organization.

FactSet maintains policies and internal guidance to support responsible data handling and access practices, including data classification expectations and secure information management.

FactSet's data privacy program is responsible for implementing internal policies in accordance with applicable laws to protect the data privacy rights of FactSetters, clients, and partners

Cybersecurity Risk Management and Strategy

FactSet maintains an information security program with a dedicated internal team tasked with leading enterprise-wide cybersecurity strategy, policy, standards, architecture, and processes. The Information Security Team is responsible for identifying, assessing, managing, and responding to cybersecurity risks, threats, and incidents related to the protection of FactSet's information assets, systems, and operations. The team also oversees the detection, prevention, mitigation, and remediation of cybersecurity incidents and proactively monitors emerging cyber threat activity to refine and enhance capabilities and maintain a robust security posture.

The Information Security Program is managed by a dedicated Chief Information Security Officer (CISO) who reports to the Chief Technology Officer (CTO), a member of FactSet's Executive Leadership Team. The Information Security Team comprises approximately 60 employees, with dedicated teams focused on governance, risk, and compliance; identity and access management; strategy and architecture; analytics and automation; Cyber Command Center (CCC) operations; and Product and Application Information Security (PAIS), including vulnerability management and application security. The team operates globally, including from FactSet offices in the United States, India, the Philippines, and Europe.

FactSet's information security and governance framework is guided by internationally recognized standards and frameworks, including ISO 27001, SOC 2 Trust Service Criteria, and the National Institute of Standards and Technology (NIST) Cybersecurity Framework.

Integration with Enterprise Risk Management

Cybersecurity risk management is integrated into FactSet's broader ERM framework. FactSet's ERM program is designed to identify, prioritize, and assess the most significant risks that could impact the Company's ability to achieve its strategic business objectives. The Information Security Leadership Team, in collaboration with the ERM team, reviews cybersecurity risks each quarter through the enterprise risk management process.

Security Program Activities and Controls

FactSet's information security program follows a risk-based approach and integrates security into product delivery through a Security Development Lifecycle (SDL) that embeds secure design, coding standards, and security testing throughout the software development process. Activities include managing security controls, conducting internal and external vulnerability assessments, performing annual penetration testing with leading service providers, and leading training and tabletop exercises, including an annual tabletop exercise with the Executive Leadership Team. Findings from penetration tests and vulnerability assessments are classified using a combination of scoring methodologies and internal business metrics, and remediation efforts are prioritized commensurate with assessed risk.

Training and Awareness

All FactSet employees receive mandatory annual cybersecurity training, supplemented by regular internal communications and awareness activities that reinforce cyber-secure practices.

Software engineers complete role-based annual Secure Code Training focused on secure software development best practices, and targeted training is provided on emerging threats and evolving risks. Within the Security Champions Program, champions receive hands-on penetration testing training. In addition, champions participate in Secure Code Warrior training focused on secure coding practices. FactSet also conducts quarterly phishing simulations to evaluate and reinforce cybersecurity awareness across the organization.



Third-Party Risk Management

FactSet has processes to identify and mitigate cybersecurity and privacy risks arising from relationships with third parties. These processes include protocols to assess vendors' cybersecurity and data privacy programs prior to engagement and to monitor material vendors, once engaged, for ongoing compliance with FactSet's cybersecurity and data privacy standards.

Incident Response

FactSet maintains an incident response plan that outlines procedures to detect, respond to, and recover from potential cybersecurity incidents. The plan includes processes designed to triage incidents, assess severity, escalate appropriately, contain and investigate incidents, and implement remediation measures. The plan also supports compliance with applicable legal obligations and mitigation of potential reputational impacts.

FactSet's information security program is regularly evaluated by internal and external experts, with results reported to senior management, including the ELT and the Audit Committee, and, where appropriate, to the full Board of Directors. FactSet also engages with key vendors, industry participants, and intelligence and law enforcement communities as part of ongoing efforts to enhance the effectiveness of its information security policies and procedures.

The cybersecurity threat landscape is dynamic and requires ongoing investment. While FactSet's processes are designed to help identify, detect, prevent, respond to, and mitigate cybersecurity risks, threats continue to evolve rapidly, and there is no guarantee that a future cybersecurity incident could not materially affect the Company's business strategy, results of operations, or financial condition.

AI Governance

As AI capabilities are embedded across FactSet's platforms and workflows, governance and oversight are critical to maintaining data integrity and client trust.

FactSet understands the importance of responsible development and use of AI, and has established appropriate governance bodies providing cross-functional oversight of AI-related risks, controls, and policies. In early FY26, FactSet launched the FactSet AI Foundry to accelerate how we design, build, govern, and scale AI capabilities across the Company. This marks an important step in positioning FactSet to lead in AI through focused leadership, enterprise coordination, and disciplined execution at scale. The Foundry will also promote consistent governance and responsible AI practices across the organization.

FactSet applies machine learning and AI to enhance data processing, analytics, and workflow automation, while maintaining governed access to data and models. AI-enabled outputs are clearly identified and supported by source attribution to promote transparency and auditability. AI interactions are processed within secure, private environments.

FactSet does not use client prompts or responses to train large language models in an unsupervised or automatic manner. User prompts and responses are confidential and are accessible only to a limited group of authorized FactSet employees for the purpose of evaluating accuracy and contextual relevance. Logs are retained for 24 months for active client relationships, and confidential client data is purged within 60 days following full termination of a license agreement.



All models used by FactSet are private and operate within FactSet's cloud or secure private endpoints of commercial large language models. FactSet does not use public large language models via public endpoints to deliver its AI-enabled services. Third-party AI suppliers are subject to security and confidentiality obligations aligned with FactSet standards, including zero data retention and opt-out from abuse monitoring.

FactSet enforces individual identities and third-party data entitlements across all delivery channels, including terminals, APIs, digital views, and Model Context Protocol (MCP). AI-enabled responses are generated using trusted FactSet commercial data, appropriately licensed third-party data, and client-confidential data, where authorized, with full in-context source linking to support verification and data lineage.

FactSet maintains human oversight and monitoring processes to assess accuracy, reliability, and potential bias as AI capabilities evolve, while aligning with applicable laws and regulatory expectations. FactSet's AI tools provide informational outputs only and do not constitute investment advice, ratings, projections, or opinions.

Supply Chain Management

FactSet's supply chain is primarily composed of technology, data, professional services, cloud infrastructure, and facilities vendors. Responsibility for supplier oversight is shared across Procurement, Legal, Compliance, Security, and Sustainability. FactSet communicates expectations for responsible conduct through its Supply Chain Code of Conduct, which applies to all suppliers and third parties and sets baseline standards for legal compliance, ethical behavior, health and safety, and data protection.

Supplier-related risks are assessed through FactSet's vendor onboarding process and enterprise risk management (ERM) framework, with enhanced due diligence applied to vendors supporting critical operations or accessing sensitive systems. FactSet applies a risk-based approach to supplier oversight, informed by service criticality, data access, and overall risk profile.

FactSet's most significant supply chain impacts occur upstream and are reflected in Scope 3 greenhouse gas emissions, particularly within purchased goods and services and cloud infrastructure. As part of its decarbonization efforts, FactSet is building visibility into key upstream emissions categories to inform future supplier engagement and support a more targeted approach to Scope 3 management over time.





Appendix

- SASB Content Index Table
- Forward-Looking Statements

SASB Content Index Table

SASB Standard: Professional & Commercial Services

FactSet references the Sustainability Accounting Standards Board (SASB) Standard for Professional & Commercial Services. Climate-related disclosures are included as supplementary references to provide additional context on environmental management and greenhouse gas emissions.

SASB Accounting Metric	Response/Location	SASB Code
Activity Metrics		
Number of employees	Talent Engagement Chapter (p. 25)	SV-PS-000.A
Employee Engagement; Inclusion & Belonging		
Percentage of gender and racial/ethnic group representation for management, technical staff, and all other employees	Inclusion and Belonging Chapter (p. 25)	SV-PS-330a.1
Employee engagement as a percentage	Talent Engagement Chapter (p. 25)	SV-PS-330a.2
Voluntary and involuntary turnover rate for employees	Talent Engagement Chapter (p. 25)	SV-PS-330a.3
Data Security		
Description of approach to identifying and addressing data security risks	Data Privacy and Cybersecurity Chapter (p. 34)	SV-PS-230a.1
Description of policies and practices relating to collection, usage, and retention of customer information	Data Privacy and Cybersecurity Chapter (p. 34)	SV-PS-230a.2

SASB Accounting Metric	Response/Location	SASB Code
Professional Integrity		
Description of approach to ensuring professional integrity	Business Ethics Chapter (p. 34)	SV-PS-510a.1
Total amount of monetary losses as a result of legal proceedings associated with professional integrity	See Form 10-K (FY25), Item 3 – Legal Proceedings	SV-PS-510a.2
Environmental Impact (Supplementary Disclosure)		
Description of climate strategy and greenhouse gas emissions management	Climate Strategy and Risk Management Chapter (p.17)	N/A
Greenhouse gas emissions and reduction targets	Greenhouse Gas Emissions and Reduction Targets Chapter (p. 17)	N/A

Forward-Looking Statement

Certain statements in this report are aspirational or otherwise forward-looking, including, without limitation, statements about expectations, plans, or projections about the future, including statements about the Company's strategy or product developments, and estimates, projections, scenario analysis, goals, and statements relating to our climate-related plans, goals, and potential impacts. These statements are based on management's current expectations, estimates, forecasts, projections, beliefs, and assumptions. Forward-looking statements may be identified by words like "expects," "believes," "anticipates," "plans," "intends," "estimates," "projects," "should," "indicates," "continues," "may," "will," and similar expressions. These statements are not guarantees of future performance, outcomes, events, or actions and involve a number of risks, uncertainties, and assumptions. Many factors, including scientific or technological developments; evolving sustainability strategies and standards; evolving government regulations; our expansion into new products, services, technologies, and geographic regions; or other changes in circumstances, as well as the risk factors set forth in FactSet's filings with the Securities and Exchange Commission, particularly its latest annual report on Form 10-K and quarterly reports on Form 10-Q, as well as others, could cause results, performance, achievements, or activities to differ materially from those stated. Forward-looking statements speak only as of the date they are made, and FactSet assumes no duty to and does not undertake to update forward-looking statements. Actual results could differ materially from those anticipated in forward-looking statements, and future results could differ materially from historical performance. The inclusion of information in this report, including regarding FactSet's corporate sustainability progress, plans, and goals, and climate-related risks and opportunities, should not be construed as a characterization regarding the materiality or financial impact of that information for purposes of U.S. securities laws or otherwise. In addition, historical, current, and forward-looking sustainability-related statements and information may be based on standards that are still developing, internal processes that continue to evolve, and assumptions that are subject to change in the future.



Our commitment to corporate citizenship is built into all aspects of our business. FactSetters worldwide have a passion for making an impact on our business and in our communities. Our Sustainability Report highlights our commitment to strong governance, impactful community engagement, and our diverse and globally inclusive employees.

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