

FactSet Academic Package

FactSet delivers superior analytics, service, content, and technology to tens of thousands of investment professionals around the world. We are committed to providing Academics with the data and analytics to gain fresh perspectives, informed insights, extensive company and industry intelligence, with a user-friendly interface and the industry-leading support of our dedicated specialists to utilize in academic research, coursework, trading rooms, student investment funds, and libraries.

Key Analytics/Reports

- Company/Security Analysis – public and private, bonds, mutual funds, ETFs
- Industry Analysis
- News and Quotes
- Screening – equity, debt, holders, mutual funds, IPOs, and PE/VC
- FactSet Mergers
- Equity Portfolio Analysis – weights, contribution, attribution, and performance reports. Direct holdings integration available (pending custodian approval)
- Economic Analysis
- Ownership

Workstation details

- **Unlimited number of users**; FactSet's Academic Package is a campus-wide license which entitles all students, professors, faculty, and IT staff to their own individual logins, in addition to access in common areas such as libraries, trading rooms, or computer lab environments.
 - Common workstation: used primarily in computer labs, trading rooms, or libraries; allows access to multiple users on 1 terminal. Includes full Excel functionality.
 - Individual web-based workstation: access is unique to each user, deployed to most students, allows the most flexibility and can be accessed via any computer with internet access.
 - Individual installed workstation: software can be locally installed on a personal Windows computer, access is unique to each user, includes full Excel functionality.

Support

- Comprehensive online help database, includes printable tip sheets
- Learning portal application provides access to video tutorials on applications and reports
- Personalized initial deployment coordination
- Dedicated support person assigned to assist professors with integration of the software into course projects and assignments

Cost

- Annual subscription terms, \$30,000 USD

Data Included

- Bonds and Loans – <https://www.factset.com/products-data/core-company-data>
- Corporate Activism – <https://www.factset.com/products-data/event-driven-data>
- Corporate Governance – <https://www.factset.com/products-data/event-driven-data>
- Debt Capital Structure – <https://www.factset.com/products-data/core-company-data>
- Economics – <https://www.factset.com/products-data/market-data>
- Estimates – coverage includes 17k+ active companies across 90 countries, with comprehensive consensus and detailed level estimates from over 800 brokers. <https://www.factset.com/products-data/core-company-data>
- Events and Transcripts – <https://www.factset.com/products-data/event-driven-data>
- Filings – <https://www.factset.com/products-data/core-company-data>
- Financial Entities - <https://www.factset.com/products-data/core-company-data>
- Fundamentals – coverage includes 80k+ public, private, and now inactive companies with annual history back to 1980s in developed and early 1990s in emerging markets. Interim history is available from 1998. <https://www.factset.com/products-data/core-company-data>
- Geographic Revenue Exposure – <https://www.factset.com/products-data/alternative-data>
- Market Aggregates – <https://www.factset.com/products-data/market-data>
- Mergers and Acquisitions – <https://www.factset.com/products-data/event-driven-data>
- Mutual Funds – <https://www.factset.com/products-data/core-company-data>
- Ownership – <https://www.factset.com/products-data/core-company-data>
- People – <https://www.factset.com/products-data/core-company-data>
- Prices – <https://www.factset.com/products-data/market-data>
- Private Company – coverage includes over 4 million companies in over 200 countries. Data is collected through our proprietary collections method, as well as through a partnership with third-party data services, Dun and Bradstreet (U.S. and Canada) and Bureau Van Dijk (Non-U.S./Canada). <https://www.factset.com/products-data/core-company-data>
- Private Equity – <https://www.factset.com/products-data/core-company-data>
- Private Placement – <https://www.factset.com/products-data/event-driven-data>
- Proxy Voting – <https://www.factset.com/products-data/event-driven-data>
- Supply Chain Relationships – <https://www.factset.com/products-data/alternative-data>
- StreetAccount – <https://www.factset.com/products-data/news-research>