

FactSet

ConnecticutNorwalk · 277,720

#NotJustTheFacts

14,261

FactSet creates flexible, open data and software solutions for tens of thousands of investment professionals around the world, providing instant access to financial data and analytics that investors use to make crucial decisions.

For 40 years, through market changes and technological progress, our focus has always been to provide exceptional client service. From more than 60 offices in 23 countries, we're all working together toward the goal of creating value for our clients, and we're proud that 95% of asset managers who use FactSet continue to use FactSet, year after year.

As big as we grow, as far as we reach, and as successful as we become, we stay connected to our clients and to each other.

<http://www.factset.com>

10,001+

NorwalkConnecticut

1978

fintechportfolio managementinvestment managementinvestment bankingwealth
managementtradingrisk and complianceclient reportingOMSEMSdata deliveryprofessional
servicesopen technologyperformance and attributionrisk management and analysis
financial data

FactSet
Financial Research
Software

FactSet Trading Solutions
Investment Portfolio Management
Software

43 Glover Ave
06850 USConnecticutNorwalk

One Snowden Street
2DQ GBEC2ALondon

Level 15, Office 52, East Wing
AE Dubai

DFL CyberCity@Hyderabad
500 019 INHyderabadGachibowli



FactSet

Malcolm Frank

Jeremy Payne
Factset Fundamentals Reimagined

Hal Haig
Head of Behavioral Analytics | Generative AI Strategies &
Product Innovation

Daniel Gatti
Vice President, Director, Cybersecurity – IT Governance, Risk
and Compliance



FactSet

277,720
17

Environmental responsibility is a core part of our sustainability journey.

In our 2024 Sustainability Report, we share progress on our climate commitments — including a 4.6% reduction in total GHG emissions and Science Based Targets initiative (SBTi) approval of our emissions targets. We’re taking meaningful steps to reduce our environmental footprint and contribute to a more sustainable future.

Read more: <https://lnkd.in/ehDNgYE4>

[#Sustainability](#) [#SustainableBusiness](#) [#FactSet](#) [#PathwayToProgress](#)

FactSet

277,720

1

Given the stock market ups and downs this year, investors and their wealth managers face a classic dilemma: How can you protect portfolios from downside risk and benefit from upside potential?

It's a tall order, which may be why investor demand for defined outcome **#ETFs** (aka buffer ETFs) has grown significantly this year.

Join **FactSet** Senior ETF Analyst **Lois Gregson, CFP®** and her guest **Elisabeth Kashner, CFA**, FactSet VP Director of Global Fund Analytics, as they take a closer look at these products and share key considerations for financial advisors.

Listen to the full episode! ↗

Apple Podcasts: <https://apple.co/4le7Nr8>

Spotify: <https://spoti.fi/3STuwvu>

3 · 1

FactSet

277,720

1

We're thrilled to announce that **Alpha Architect**, a research-driven asset manager on a mission to empower advisors through education, has joined FactSet's New Fund Issuer360 program, including the **FactSet** Model Center.

Together, we're committed to providing advisors access to best-of-breed **#assetmanager** and strategist prebuilt model **#portfolios** so they can continue to deliver top-tier advice to their clients and stay ahead of the curve.

Learn more about Model Center and its Partners: <https://bit.ly/3KqKt9x>

FactSet

277,720

1

We had an amazing time connecting and innovating at the **Databricks #DataAndAISummit!**

Our breakout session, led by **Kristen Clark** from **FactSet** and Keon Shahab from Databricks, explored how FactSet is revolutionizing financial data accessibility via Delta Sharing. Highlights included a deep look into the future of vectorized data sharing for unstructured content like news, filings, and transcripts.

Missed it? Watch the session recording here: <https://bit.ly/4kLHk3Q>

The excitement continued as FactSet was honored with the Databricks Financial Services Data Partner of the Year award. This recognition highlights our strong partnership and shared mission to advance innovation in financial data solutions.

A big thank-you to Databricks, our session speakers, and everyone who stopped by to chat or attend a session. Together, we're shaping the future of **#data** and **#AI**.

Learn more about our solutions here: <https://bit.ly/3TfDown>

178 · 2

FactSet

277,720

1

Empower your investment team with a single, unified platform.

Watch our on-demand webcast to hear from **FactSet** experts as they uncover how you can consolidate your workflows into one solution that lets you examine your total plan's public and private investments with multi-asset class analytics tools while reducing your total cost of ownership.

Watch now: <https://bit.ly/4n0hoU9>

10 · 2

FactSet

277,720

1

FactSet is proud to be recognized this month at the **ClearView Financial Media** 2025

WealthBriefing Asia Awards as Best **#DataProvider**.

These awards are a reflection of the investment and commitment FactSet makes to consistently deliver outstanding **#wealthmanagement** solutions for our clients.

Learn more: <https://bit.ly/489sXka>

29

FactSet

277,720

1

In this podcast episode, we are fortunate to hear from a guest revered on Capitol Hill throughout four decades of policy work on U.S. tax, trade, and health.

Episode 37: FactSet's CEO and Founder, David A. C. Smith, on the Future of Wealth Management

8 · 1

FactSet

277,720

2

With financial market and economic risks related to the Israel-Iran conflict increasing, how can firms examine the impact on their investments?

Kristina Bratanova, CFA from **FactSet**, provides a base starting point for financial professionals to stress test their investment strategies against hypothetical increases in geopolitical risks and compares them to actual recent returns from June 13, 2025. She runs the scenario on a broad global equity index and a broad global bond index and then slices the returns across different regions.

She then takes a look at a longer-term scenario, which assumes the conflicts persist and poses some trade or physical barriers for economic activity.

Read the full analysis: <https://bit.ly/3TqVYlo>

6

FactSet

277,720

2

Junior bankers are boosting their productivity and saving hours on tedious tasks, freeing up time to focus on winning deals and driving revenue.

Pitch Creator allows teams to simplify workflows to produce higher quality **#pitchbooks** with less effort and greater speed.

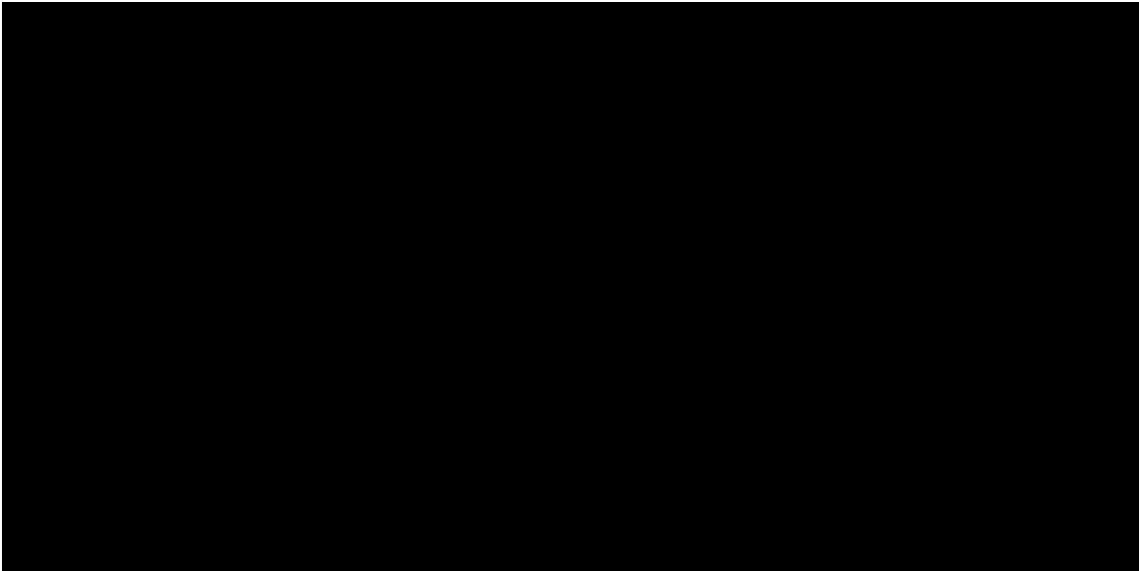
Speak to a specialist today to learn more: <https://lnkd.in/eRw28mV9>

FactSet

277,720
2

Curious how you can simplify complex workflows and uncover untapped opportunities?

Check out our interactive tour to see how **FactSet**'s hedge fund solutions integrate data,



50

San FranciscoCalifornia

S&P Global

New YorkNY

New YorkNY



FDS

NYSE

US\$425.04

2025618

20

424.1
428.47

421.74

Refinitiv



© 2025

Your California Privacy Choices

Cookie