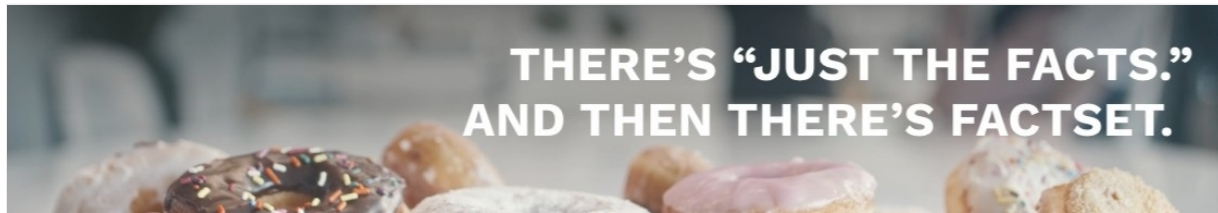




Learning



FactSet

ConnecticutNorwalk · 277,889

#NotJustTheFacts



14,259



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>

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

FactSet
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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



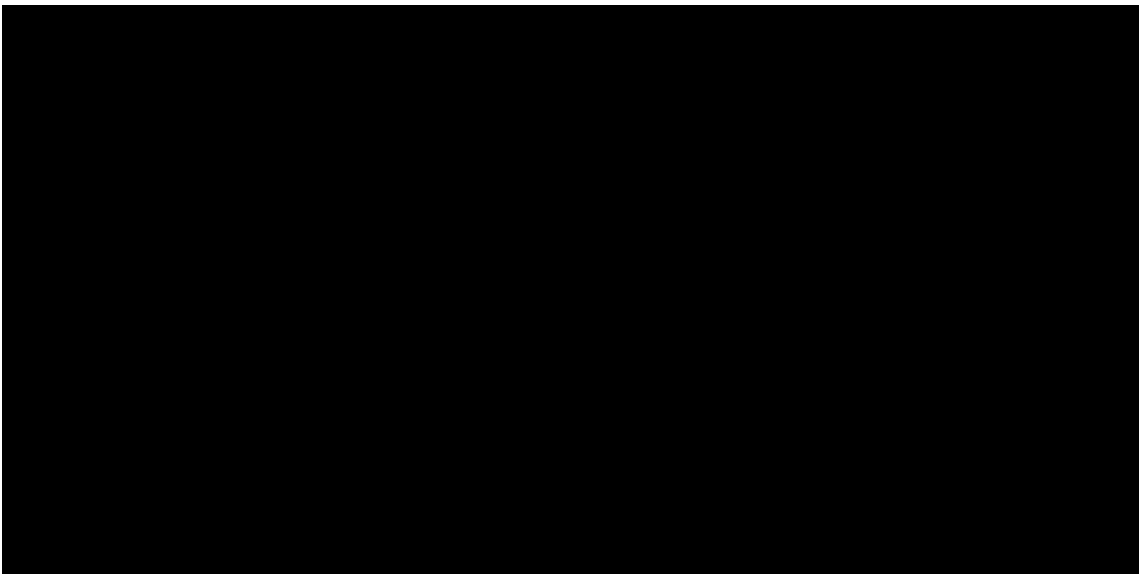
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Listen to special insights from a key figure in Washington policy circles who for decades shaped U.S. tax, trade, and health policy.

Malcolm Frank, Chairman and CEO of FactSet, will discuss the company's



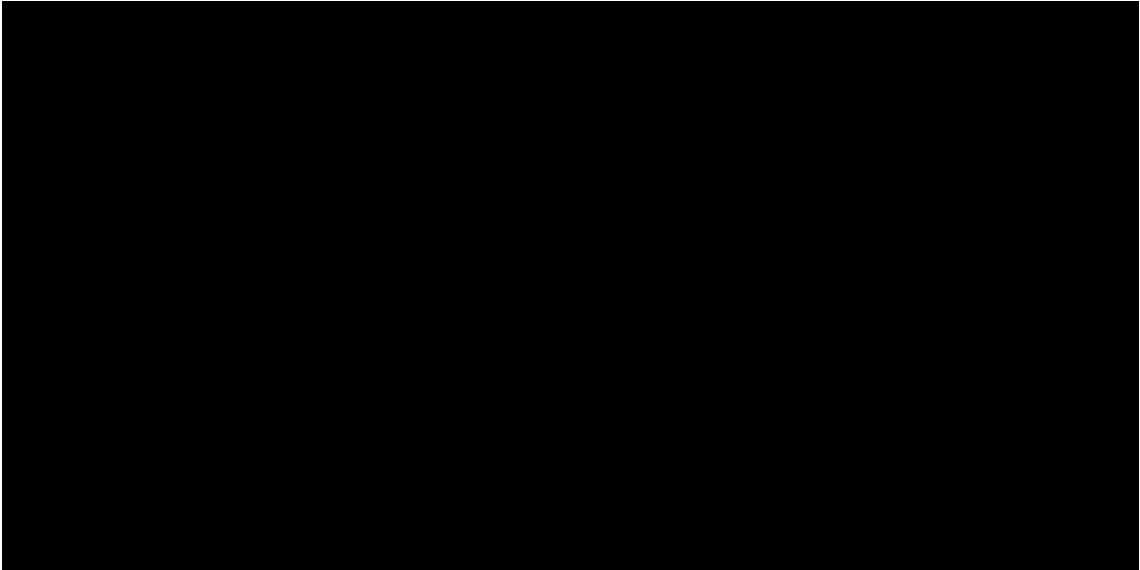
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Missed our recent discussion with **Financial Technologies Forum (FTF)** News on FactSet's **#Reporting** Solutions?



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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](#)



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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/3STuwwu>

3

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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>

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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>

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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>

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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>

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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.

Podcast: FactSet's 2023 Asia Awards for Best Data Provider

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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>



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