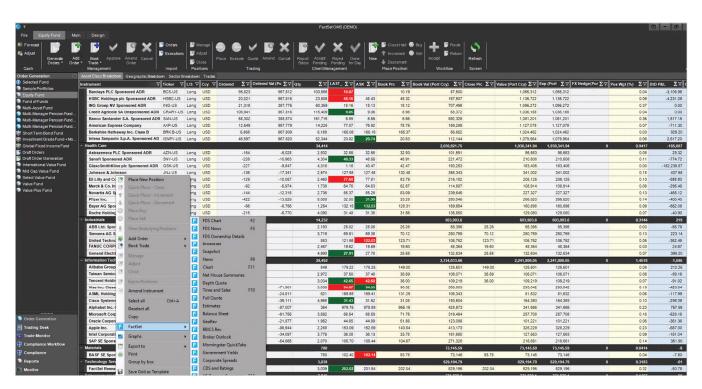
FACTSET ORDER MANAGEMENT AND COMPLIANCE

Seamlessly manage your investment workflow and streamline tasks across your portfolios with FactSet's fully integrated, cloud-hosted order management and compliance solution (OMS).



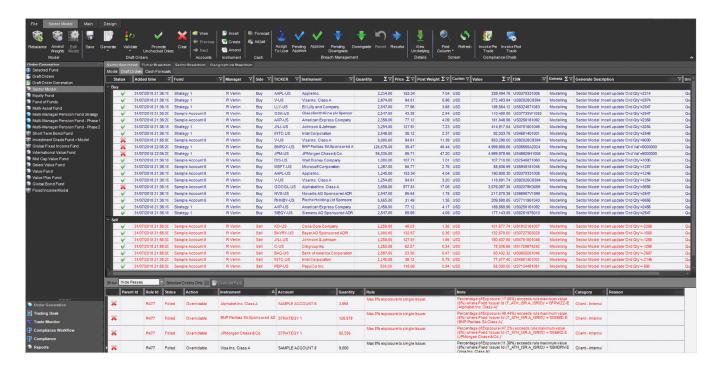
LEVERAGE A POWERFUL OMS WITHIN FACTSET

Combine the customizeable, efficient workflows of FactSet's multi-asset, multi-currency OMS solution with FactSet's turn-key data integration. Monitor your portfolio's performance and exposures with variance heat maps, tolerances, and event-driven alerts. Leverage FactSet's real-time price, benchmark, and risk content to simplify data management and harness the power of a single trusted source for your information. Boost your portfolio monitoring and decision-making with real-time, intraday updates to performance, attribution, and risk within FactSet's Portfolio Analysis suite.

POWER YOUR COMPLIANCE ENGINE

Monitor compliance in today's evolving regulatory landscape with a sophisticated rules manager powered by FactSet's comprehensive risk and analytics data. Seamlessly integrate third-party and FactSet content and metrics, including duration, sector exposure, and geographic revenue exposure, and support all rule types and mandates including concentration, look-through, compound, and limit checks. Fulfill the requirements of global regulations such as UCITS, the 1940 Act, and MiFID II, with FactSet's open rules design, and easily track the underlying causes of compliance breaches. Save time and boost efficiency with compliance checks and streamlined workflows, permissions, and approval settings tailored to your firm's specific needs.

FACTSET) SEE THE ADVANTAGE



CUSTOMIZE YOUR WORKFLOW

Tailor your workspace using FactSet's intuitive interface, adaptable screens, and fully permission-based operating model. Configure portfolio views on the fly to better accommodate the unique needs of each user, team, strategy, and asset class, and easily share views between members of the investment team. Automate the blocking, handling, and routing of orders using any combination of parameters with FactSet's logic-driven order management tools. Quickly access critical information in one view that captures consolidated and real-time compliance, as well as order and execution status across your front, middle, and back office.

HARNESS THE POWER OF OPEN ARCHITECTURE

Seamlessly connect FactSet's platform-agnostic OMS to your front, middle, or back office, including your firm's proprietary systems and data warehouses. Leverage FactSet's open architecture model to integrate your own third-party resources through a host of dedicated, published APIs for orders, executions, compliance, and prices.



BENEFIT FROM INDUSTRY-LEADING SUPPORT

Experience consistent support and service through FactSet's exceptional client service group. Our dedicated OMS team is available around the clock to make your transition smooth and successful, assist in developing custom reports and displays, and provide actionable advice throughout our partnership.