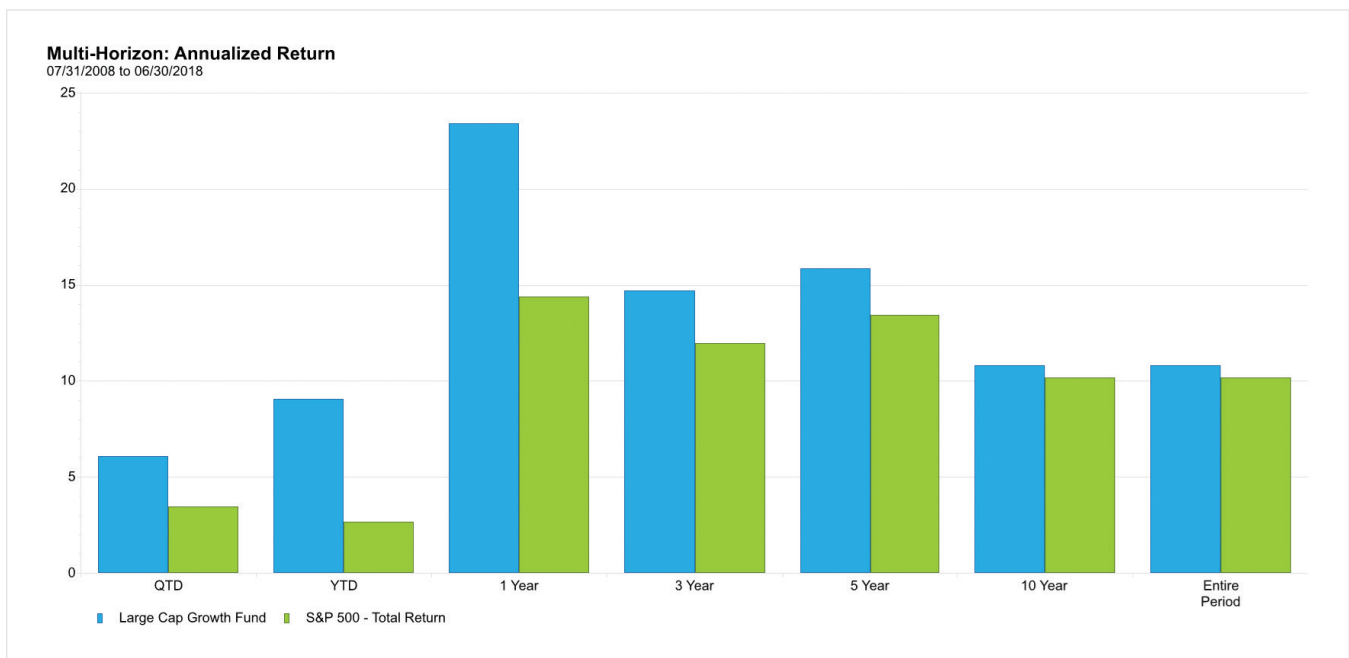


STYLE, PERFORMANCE, AND RISK ANALYSIS

Leverage powerful reports and charts within FactSet’s returns-based portfolio analysis application to help you study a portfolio relative to a benchmark, competitor, or peer universe.



UNDERSTAND STYLE, PERFORMANCE, RISK, AND PEER ANALYSIS

Research the historical risk and risk-adjusted performance of your portfolios, benchmarks, and peers.

- Display and interpret multi-horizon, calendar, and rolling returns across various tables and charts
- Display style characteristics to determine funds’ small cap, large cap, value, and growth tendencies
- Perform robust analysis to answer detailed risk and return questions about your portfolios and strategies
- Analyze your portfolio relative to 20,000 equity and fixed income benchmarks by leveraging over 70 MPT risk statistics

IDENTIFY INVESTMENT OPPORTUNITIES

Create screens that meet specific criteria to quickly identify investment opportunities.

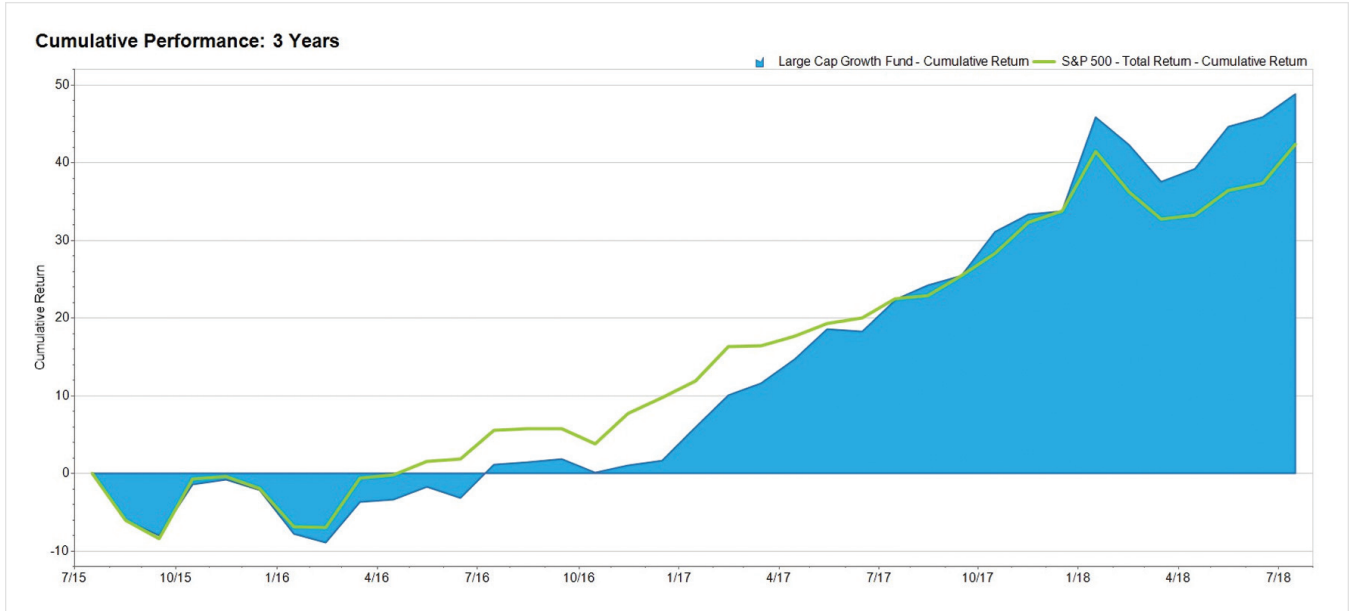
- Screen over 500,000 U.S. and international mutual funds, separate accounts, and hedge funds
- Enhance your reports with qualitative data such as number of holdings or tenure of manager

- Create your own multi-factor ranking system to identify managers who meet that exact criteria
- Export the results of your screen into other FactSet applications for further analysis

EASILY CREATE CUSTOM REPORTS AND PRESENTATIONS

Leverage data from FactSet, third-party providers, and your proprietary systems to create dynamic reports in any Microsoft Office application.

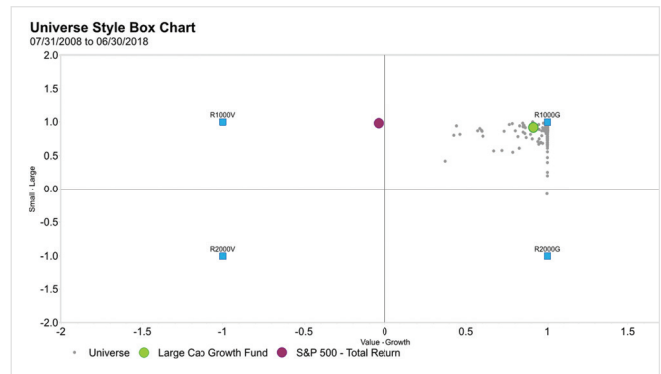
- Link models and data items between PowerPoint, Word, and Excel to display custom reports that can be easily updated
- Customize every element of a chart from colors and markers to headers and footers
- Monitor risk and return characteristics for all of your portfolios in one place with Portfolio Dashboard



SUPPORT YOUR ANALYSIS WITH AN INTUITIVE WORKSPACE

Work smarter with industry-leading functionality at your fingertips.

- Leverage dynamic tiles, reports, and documents to customize your workspace
- Quickly transform a table into a chart or vice versa
- Apply tile settings to other reports and tiles with the click of a button
- Easily ensure dates are aligned between SPAR and FactSet’s market-leading holdings-based application, Portfolio Analysis



ACCESS ROBUST DATA AND ANALYTICS VIA API INTEGRATION

Leverage FactSet’s open, flexible technology to deliver powerful analytics using APIs.

- Power your internal and external dashboards directly with FactSet’s portfolio analytics
- Enrich your data process with self-service programming that directly extracts bulk data from FactSet to feed your data lakes and reporting tools
- Utilize the native integration of FactSet data in your business intelligence tools
- Send and receive analytics for your model portfolios via API

