

POLEN CAPITAL GAINS COMPETITIVE EDGE IN AGGRESSIVE INVESTMENT ENVIRONMENT

› Large cap growth asset manager streamlines data delivery using FactSet's Investment Management workflow solutions.



AUM
\$6.7b

FIRM TYPE
Institutional Asset Manager

CHALLENGE
Data from disparate sources
and manual workflows

FACTSET SOLUTION
FactSet Investment
Management Workstation

“Being able to cut through all the clutter and all of the data that’s out there to find usable, useful information that we know is accurate is extremely important. FactSet helps us consolidate the data very quickly, so we can make decisions that will benefit our clients over time.”

The Challenge

[Time-consuming, manual research and data management.](#)

Dan Davidowitz, CIO and Lead Portfolio Manager of Polen Capital, first encountered FactSet in the late 1990s while working at an investment research and financial publishing firm. As a newcomer to the investment business, hungry to learn about every resource available to him, he began experimenting with his employer’s FactSet workstation. Davidowitz was immediately hooked by the power of FactSet data, the workstation’s ease of navigation, and the value added by FactSet’s sales and support teams.

When Davidowitz joined Polen Capital, a large cap growth asset manager whose clients range from large corporate pension plans to independent investors, he immediately saw the need for a solution like FactSet at his new firm.

“Every day, Polen Capital is doing fundamental research. We’re going company-by-company, digging through their financials, looking at their competitors, trying to figure out the truth about a company and its industry,” explained Davidowitz. “It’s a lot of work and it’s very, very time-consuming. We were not using any real sophisticated tools to help do research, so having a robust tool that brings all of that to [us] in a very intuitive and user-friendly way is important.

The Solution

[FactSet’s consolidated software and automated workflows.](#)

Davidowitz knew from his experience with FactSet that the platform combined the unique data and analytics Polen Capital needed to succeed.

“The asset management business is very competitive,” he said. “It’s a high profit margin industry that attracts a lot of very smart people. Anything that you can do to add value to clients is extraordinarily important. That’s why I knew that FactSet would be a good fit for us.”

Recognizing that FactSet had the functionality to assist with his firm’s investment processes, he lobbied for the firm to leave its manual workflows behind and invest in FactSet solutions.

“We tried a bunch of different tools and a lot of competitive products, but nothing was even close to the capability of the FactSet software—and its service was unmatched,” Davidowitz recalled.

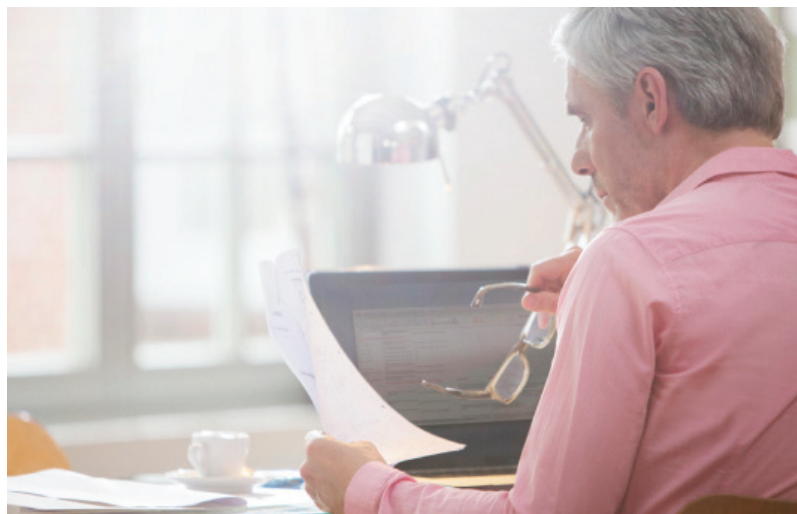
The Result

[Polen gains workflow efficiencies with FactSet’s intuitive platform and committed support team](#)

Today, Polen’s analysts rely on FactSet’s robust data and flexible delivery to help them synthesize information and quickly arrive at actionable insights.

“We can get data from a lot of different sources, but what we need is usable information. We’re inundated every day—there’s news on companies that we’re interested in every single second of every day. Being able to cut through all the clutter and all of the data that’s out there to find usable, useful information that we know is accurate is extremely important. FactSet helps us consolidate the data very quickly, so we can make decisions that will benefit our clients over time,” said Davidowitz.

As a lean firm, Polen also values the partnership it’s found in FactSet’s client support team.



“We don’t have unlimited time in our day to just figure out how to do things,” Davidowitz said. “Every time someone comes from FactSet to our office, there’s something new that they want to show us, something that they’ve done to make our lives easier. It’s not just the product, it’s the product plus the service that they provide.”

FactSet’s support team was especially valuable as Polen deployed the new system to its team.

“There was somebody from FactSet in our office at least once a month, maybe more often than that,” Davidowitz remembered. “That’s a pretty big deal when you’re a researcher who has limited time and a lot of things on your plate. Anything that can help make you more efficient and more effective in what you’re doing is powerful.”

Based on the value FactSet has added to the Polen team, Davidowitz expects to remain a partner for years to come.

“Our use of FactSet and our relationship has gotten much, much bigger and deeper over the years, and I expect it will only continue to grow.”

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