

Front Office Solutions

Gain a holistic solution that will scale with your needs and optimize your investment process from research and portfolio management all the way to compliance and trading.



STREAMLINE THE CRITICAL COMPONENTS OF YOUR RESEARCH WORKFLOW

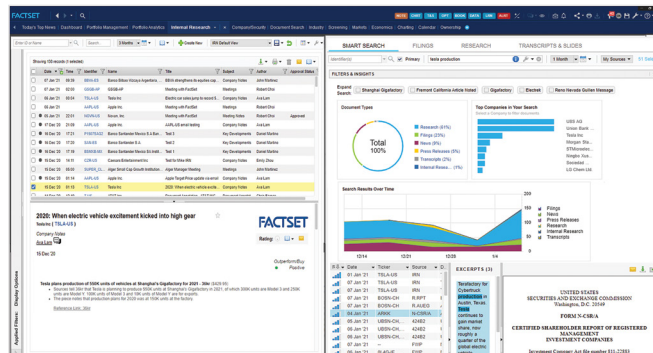
Increase efficiency across the front, middle, and back office with an open data ecosystem specifically designed for multi-asset class investors. Benefit from a fully customizable research tool that can be integrated seamlessly with the same portfolio management platform you use to analyze global market data. Monitor watch lists, portfolios, and daily market movements alongside internal research notes to track the latest changes

in active core, thematic, quantitative, and alternative investing. Populate dynamic reports, custom annotated charts, news displays, and more with a combination of real-time, high-quality financial data and your firm's research. Submit ideas through a dedicated research management application, and count on advanced artificial intelligence to derive unique insights from qualitative data.

FACTSET > SEE THE ADVANTAGE

EXPLORE DOCUMENTS AND INTEGRATE RESEARCH FOR INSTANT, ACTIONABLE INTELLIGENCE

Save time and effort in idea generation, information gathering, and research analysis workflows with FactSet's extensive universe of documents. Leverage smart search tools and AI to easily find relevant results for your queries. Search across multiple sources including broker research, filings, transcripts, investor slides, alternative data, and your proprietary research. Monitor your watch list and portfolio with your firm's research and estimates to stay informed of their latest changes. Enhance portfolio construction with the ability to monitor performance and view the completion of internal buy lists and models.



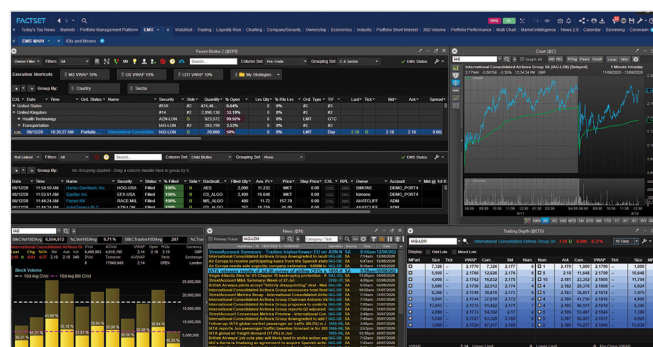
The screenshot shows the FactSet Portfolio Management Platform interface. The main content area displays a detailed view of a portfolio, with a table listing various holdings. The table includes columns for ticker, name, quantity, price, and value. The interface includes a sidebar with navigation options and a top bar with search and filter tools.

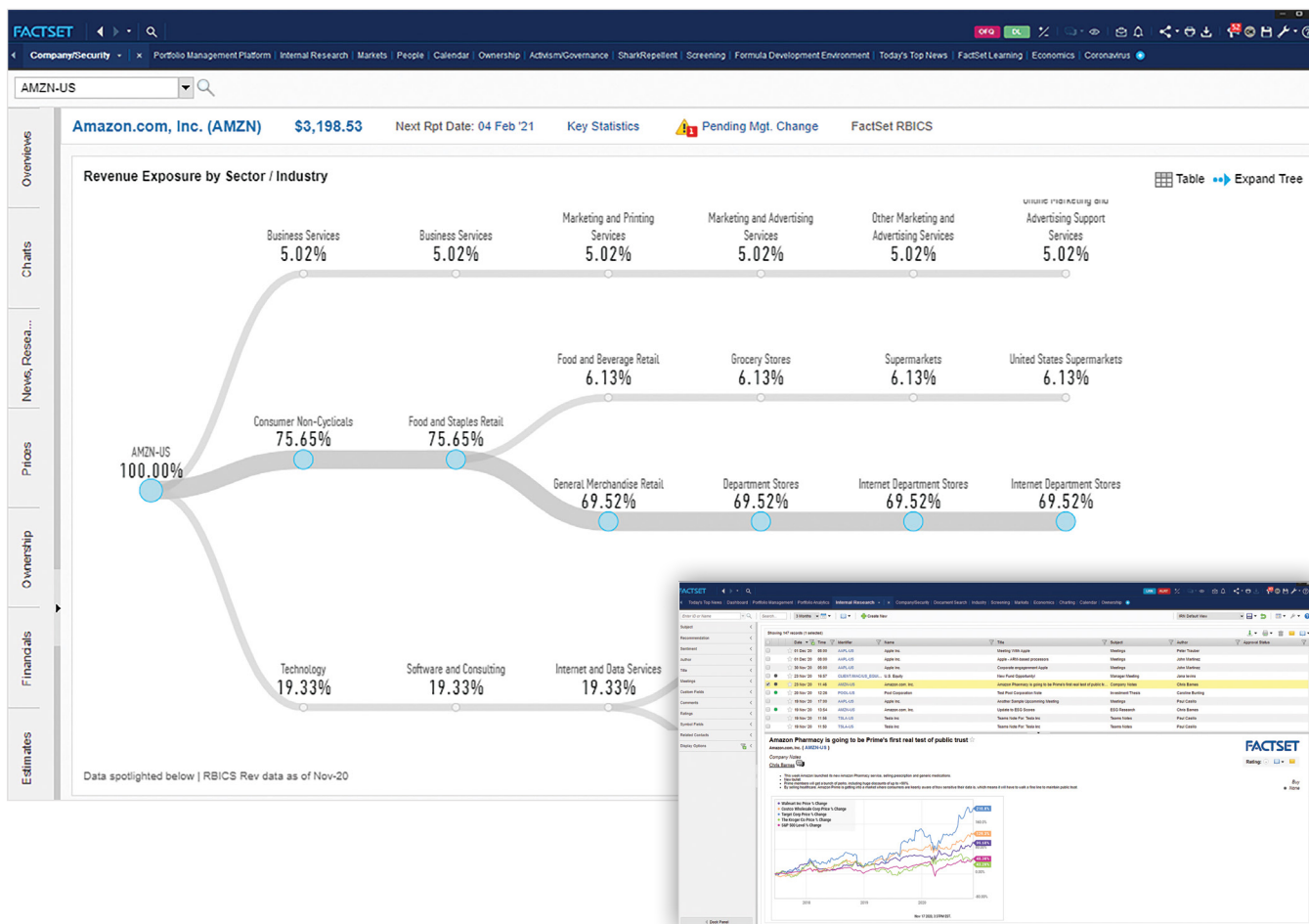
LEVERAGE SOPHISTICATED ANALYTICS TO MAXIMIZE YOUR PORTFOLIO PERFORMANCE

Generate and execute investment ideas in real time with instant access to portfolio news, commentary, and exposures. Monitor, analyze, and manage portfolios across asset classes using FactSet's full range of investment and risk analytics. Implement profitable investment strategies and monitor composition, characteristics, performance, and risk in custom reports. Quickly test ideas by simulating security trades, compare pre- and post-trade portfolios, and review their compliance before passing them to the trading desk for execution. Eliminate the need for manual trade reentries and easily submit simulated trades to any order management system (OMS). Boost your trading confidence with a single set of holdings and analytics that can be used for both front-office portfolio decision-making and middle-office portfolio analysis and reporting.

CONNECT DIRECTLY WITH TRADERS FOR SEAMLESS EXECUTION

Ensure pre- and post-trade compliance with active and passive breach management. Leverage FactSet's turnkey integration with our leading order management system (OMS) and execution management systems (EMS), or easily integrate your third-party OMS or EMS with our portfolio management system using APIs. Choose your preferred method and build a seamless workflow from research and simulation all the way to execution and analysis.





ACCESS UNIQUE COMPANY AND MARKET DATA FOR A COMPETITIVE ADVANTAGE

Find untapped alpha with unique datasets that help you go from data to implementation faster. Connect content from FactSet, third-party providers, and your in-house systems to perform more meaningful analysis on public and private companies, industries, and markets. Monitor the performance and characteristics of any asset class on both a current and historical basis. Get one-of-a-kind insight into alternative data with deep research into interconnecting business relationships, company ESG scores and practices, and more. Identify opportunities and measure risk exposure in the global equities and derivatives markets using FactSet's supply chain, geographic revenue, and entity structure information. Receive intraday updates on key data items and view economic coverage along with on-demand regional and country-specific analytical reports for easy comparison.

A UNIFIED AND SCALABLE PLATFORM THAT MOVES AS YOU DO

Rely on FactSet's technology and mobile solutions to seamlessly integrate and manage your firm's portfolio holdings and internal research. Edit watch lists, monitor performance, access quote activity, and keep up with investment news directly from your phone or tablet. FactSet also gives you access to full-featured reports and applications via a secure, cloud-based web portal that works from anywhere, allowing you to collaborate with colleagues around the world. Whether you use a standalone workflow solution or the complete front office suite via the FactSet Workstation, FactSet Web, data feeds, or APIs, FactSet provides open and flexible data management functionality that will grow with your firm's evolving needs.