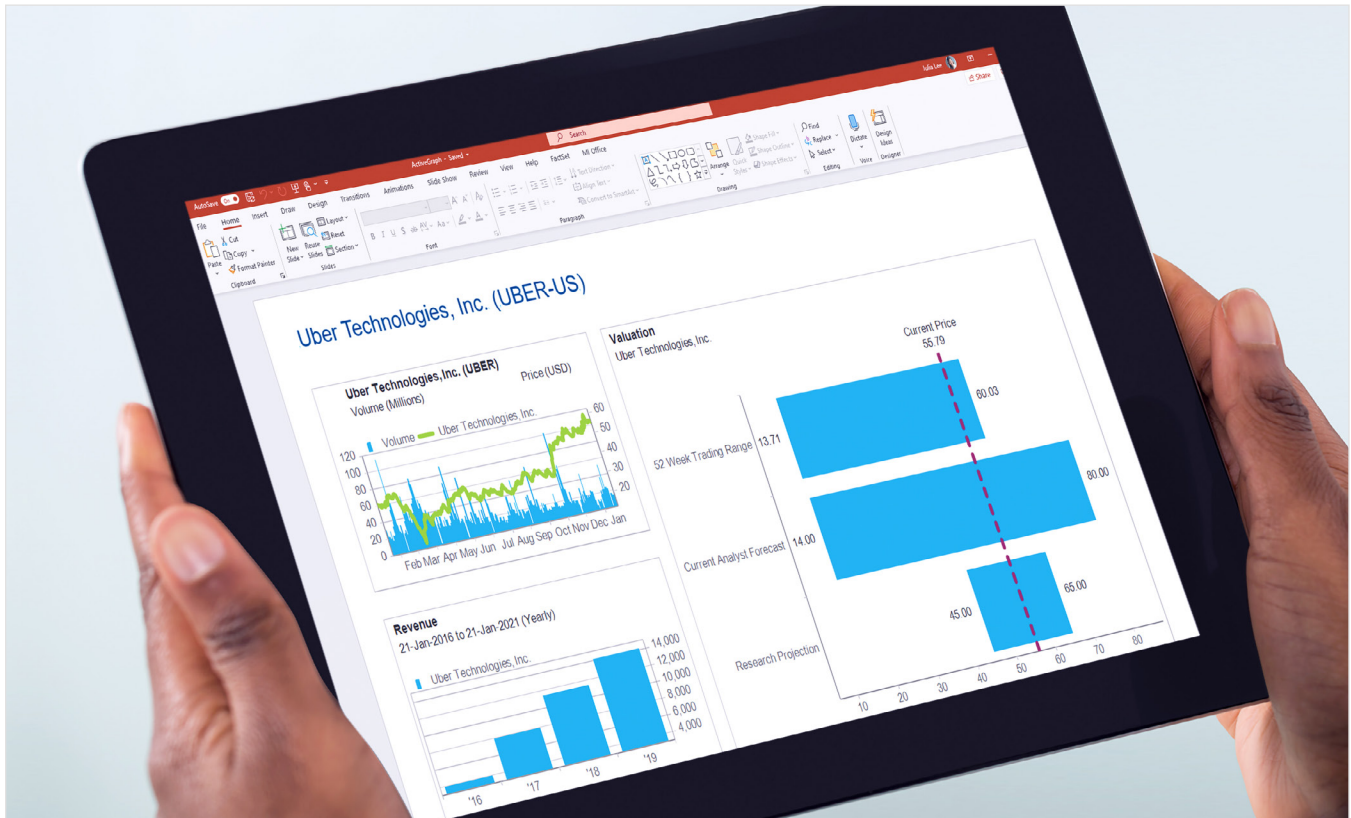# FactSet's Microsoft Office Integration
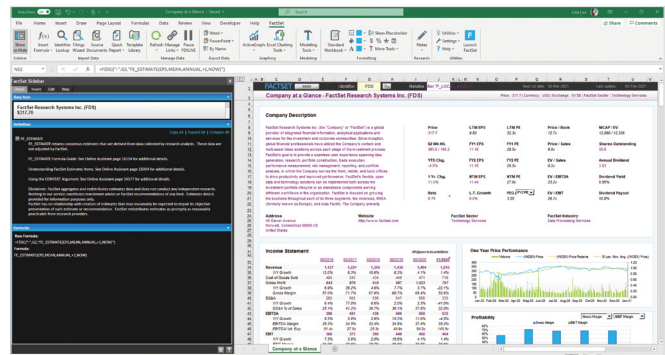
Seamlessly access FactSet's data and analytics while collaborating with colleagues in your most used environment: Microsoft Office.

BUILD DYNAMIC, REFRESHABLE MODELS, TABLES, AND CHARTS

Create and enhance models with content from FactSet's numerous datasets to get a comprehensive overview of companies, institutions, investors and more in Microsoft PowerPoint, Word, and Excel applications.

- Select from a library of over 100 templates of the most used reports, including financial and ownership data

- Build flexible tables and charts with a step-by-step formula builder that alleviates the need for coding experience

- Refresh models at the click of a button to quickly and reliably capture any recent changes and updates to the data

- Add dynamic visual components to reports with custom colors, fonts, and logos to match corporate brand guidelines

- Streamline presentations by linking data between Excel, PowerPoint, and Word
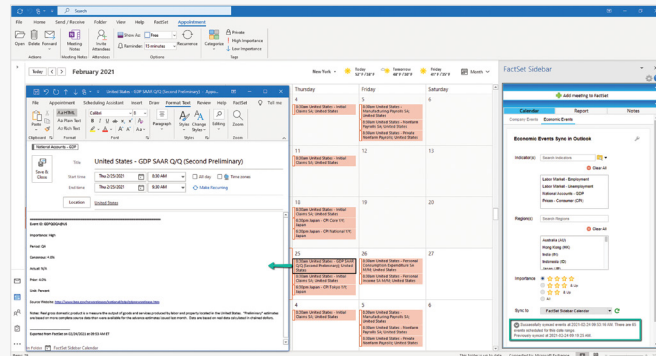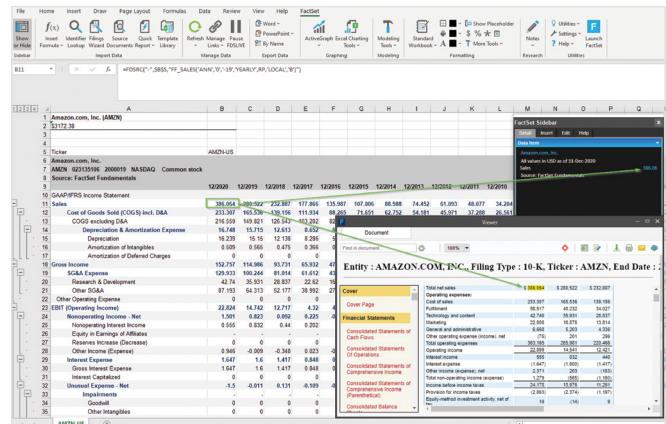
AUTOMATE REPETITIVE AUDITING AND FORMATTING TASKS

Expedite common formatting, updating, and auditing tasks and seamlessly keep all of your data consistent across Microsoft Office applications.

- Improve modeling speed with keystroke-driven spreadsheet tools and custom hotkeys such as automated color-coding

- Import tables and text from any HTML or PDF file into Excel while preserving an audit trail to the source

- Import tables and text from public or proprietary HTML and PDF files into Excel while preserving an audit trail to the source

- Link data between Excel, PowerPoint, and Word to easily import and update data and charts in presentations

- Save time on tedious formatting tasks with tools that automate alignment and spacing of shapes, logos, and text

STREAMLINE YOUR WORKFLOW

Leverage a powerful Microsoft Outlook integration to stay up to date on events, share your research, and comply with global regulations.

- Synchronize financial earnings and event calendars with Outlook and never worry about missing an earnings report or company and economic event

- Intuitively create research notes directly from your email

- Keep track of meetings related to investment decisions for compliance or compensation purposes

- Promote cross-firm collaboration by easily sharing notes about internal and external meetings with your colleagues

RETRIEVE FACTSET DATA WITHIN MICROSOFT TEAMS

Seamlessly collaborate with colleagues in one communication environment with access to FactSet's industry-leading financial data and news directly within Microsoft Teams.

- Search for detailed company information and share it with colleagues in one system

- Stay up-to-date on market-moving news with personalized alerts and notifications regarding top stories, events, and daily StreetAccount summaries

- Leverage answer functionality to ask questions within Teams and receive replies to hundreds of popular queries, such as sales, net income, bond yields, and industry classifications on public and private companies