



ABOUT THE FIRM

With over \$35 billion AUM, this global asset manager concentrates on providing investment insights and solutions to quantitative research groups in the focus areas of multi-asset, defensive equity, active equity, and sustainable equity.



THE CHALLENGE

- Lacking depth in current estimates data
- Time-wasting, mismatched datasets
- Inaccurate data with indistinct sourcing



THE SOLUTION

- Smooth transition and ease of use with existing FactSet experience
- Robust security master hierarchy of entity IDs
- More unique and accurate data items sourced directly from broker reports



THE RESULTS

- Smart data network across the whole enterprise
- Trusted partnership
- Increased research productivity

Global Asset Manager Achieves Unmatched Accessibility and Accuracy of Estimates Data with FactSet

A successful transition from its previous estimates provider to FactSet allowed this firm to seamlessly access deeper, more extensive estimates data.

THE CHALLENGE

A global asset manager sought to overcome the common challenges of cost pressures and ease of use by consolidating data vendors. The firm was a long-standing client of a major estimates provider, which gathers estimates information from a broker research contribution portal resulting in disparate and imprecise data. To review forward-looking versus backward-looking data meant accessing two separate databases, an inefficiency that users at the firm could no longer ignore. Availability and accuracy of the data were being questioned, pushing the team to reevaluate their estimates provider. In recognizing the need to save costs without sacrificing product value and data quality, the firm's quantitative research group turned to FactSet.

FactSet's broad universe, breadth and depth of estimates data, and the quality and transparency of its methodology gave this firm a valuable, trusted provider for all of its financial data needs.

THE SOLUTION

Once FactSet was able to provide the necessary estimates history for the firms' needs—over 20 years of data—coupled with the firm already being knowledgeable of FactSet's products from an existing relationship, it became a simple decision to consolidate. FactSet Estimates offers complete statement item estimates and more unique data items, such as industry metrics and individual broker-level estimates collected by analysts directly from broker research reports, which were crucial sourcing components that led to the team's decision.

The implementation process was fast and simple; combined with existing experience in FactSet's data feed loader, the firm was able to get up and running with estimates data in a day. In addition to seamless data delivery, the team had access to FactSet's extensive documentation and starter SQL code, allowing the team to start running tests immediately and driving value from estimates details. The team's confidence only grew as FactSet was able to point to the data directly in research reports, giving them transparency in sourcing and methodologies they didn't have with their previous provider.

Beyond more accurate estimates data, intraday updates, and equivalent deep historical data, FactSet delivered an unrivaled cross-referencing element to the solution. The research group can seamlessly access a broker ID, cross-reference earnings call transcripts, and not only see what other companies that person covers but track that broker's participation in earnings calls and the timeliness of any revisions.

THE RESULTS

Following the successful transition and integration of these datasets, the ease of delivery allowed the team to almost immediately expand their scope without additional infrastructure. Furthermore, FactSet's file delivery and download solution was efficient, ultimately saving the firm money by consolidating its financial data vendors, all while increasing productivity.

Because of the dynamic linking capabilities of FactSet's symbology model, the firm expanded its license across the enterprise, creating exponential value throughout all departments. The firm can now connect its Geographic Revenue, Ownership, Supply Chain, Fundamentals, and other datasets using one master symbology structure, which provides reach across the whole enterprise to scale and combine all of its core FactSet data.

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In the future, FactSet can also help this asset manager on its cloud journey as part of the built-in flexibility of FactSet's data delivery methods.

DISCOVER SOLUTIONS

FactSet creates data and technology solutions for investment professionals around the world, providing instant access to financial data and analytics that investors use to make crucial decisions.

Asset Management

Perform research to manage your portfolios with powerful analytics and flexible data solutions.

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FactSet Estimates Detail

Review comprehensive estimates and statistics from leading investment banks and research firms.

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