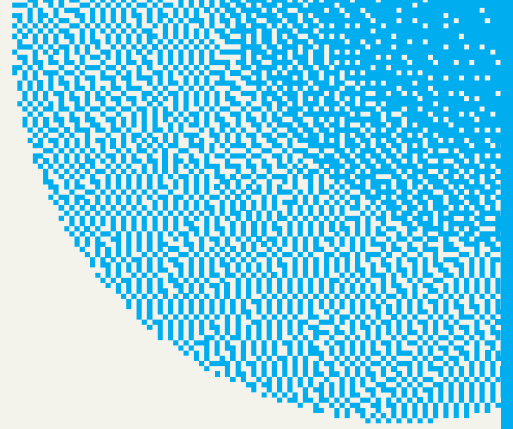
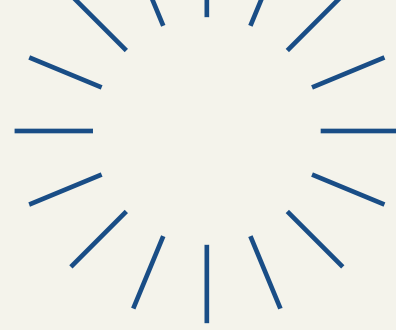
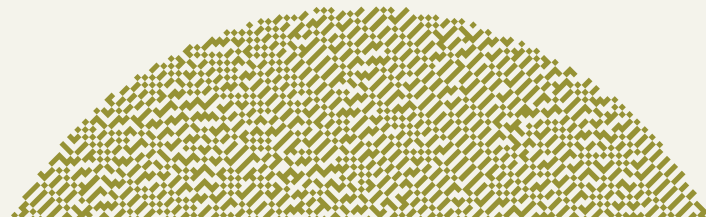
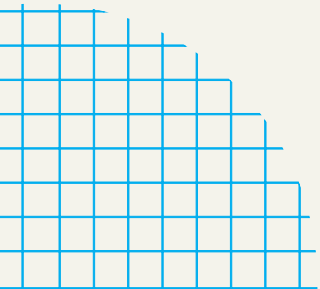


FACTSET



2022

Sustainability Report



Commitment to Action

→ Action is the process of working to achieve an aim. At FactSet, “Commitment to Action” means taking concrete steps toward the sustainability goals that we have set for ourselves. This theme manifests itself in the actions we have taken and the achievements we have accomplished as part of our environmental, social, and governance progress.

FactSet At A Glance

FactSet delivers financial data, analytics, and open technology to help the financial community see more, think bigger, and work better.

[Learn more about our solutions](#)

Founded in
1978

25+
YEARS
Publicly-Listed
Company

11K+
Employees

[Watch our latest video "Who is FactSet"](#)

90+
Client Retention

7K+
Client Institutions

180K
Users

40+
YEARS
of Consecutive
Revenue Growth

S&P
500
Member

Section 1

Introduction

- 05 Letter from the CEO
- 08 Organization and Reporting Practices
- 09 Sustainable Development Strategies, Policies, and Practices



Section 2

Environment

- 16 Environmental Sustainability
- 17 Carbon Emissions
- 20 Climate-Related Risks
- 22 Waste
- 23 Sustainable Procurement

Section 3

Social

- 27 Diversity, Equity, and Inclusion
- 40 Employee Engagement and Wellbeing
- 43 Employee Learning and Development
- 47 Community and Volunteerism

Section 4

Governance

- 51 Data Privacy
- 52 Data Security
- 54 Business Ethics
- 57 ESG Investing Solutions



Section 5

Appendix

- 62 GRI Index
- 73 SASB Table

Contents



This report celebrates the progress we've made in turning our sustainability commitments into action.



Letter from the CEO

During our 2022 fiscal year, FactSet focused on turning our environmental, social, and governance goals into action. Our passion for making an impact and achieving sustainable growth for our clients, employees, shareholders, and communities is ingrained in our values and our culture and is a key reason FactSet has remained a strong, responsible business for over 40 years. As we drive the investment community to see more, think bigger, and do its best work, we've found new ways to work productively in a post-pandemic, hybrid working environment. We continue to deliver differentiated products and services to clients while remaining steadfast in our promise to be a reliable steward of the future and make a positive difference in the world.

The theme of this year's report, "Commitment to Action," underscores our belief that actions speak far louder than words in business and sustainability. We made significant strides last year as we continued implementing our Sustainability Plan, including:

- Announcing a [net zero by 2040 goal](#) and a commitment to set a near-term target aligned with the Science-Based Target initiative (SBTi);
- Continuing to publish our validated Scope 1 and Scope 2 greenhouse gas emissions, and assessing our Scope 3 emissions for the first time, including conducting screening for calendar years 2021 and 2022;
- Creating a Sustainable Procurement Policy and Global Procurement Diversity Policy;
- Establishing Diversity, Equity & Inclusion (DE&I) goals for all FactSetters as part of our annual performance review process;
- Conducting a global pay equity review to promote compensation fairness;

- Establishing the FactSet Charitable Foundation to build on our commitment to community support;
- Earning recognition—for the first time—on both [Newsweek's List of America's Most Responsible Companies](#) and [Glassdoor's Best Places to Work in 2023](#);
- Improving our EcoVadis rating to the 87th percentile (earning us an EcoVadis Silver Medal in 2022) from the 67th percentile in 2021;
- Raising our CDP (formerly known as the Carbon Disclosure Project) rating from C to B-; and
- Remaining a proud, active participant in the UN Global Compact and a signatory of the UN PRI, committed to implementing sustainable policies and transparent reporting for the ten principles of the Global Compact in the areas of human rights, labor, environment, and anti-corruption.

This report celebrates the progress we've made in turning our sustainability commitments into action. Of course, our progress is due in large part to the hard work and passion of the over 11,000 FactSetters around the world who support our communities through our robust Corporate Responsibility Program, promoting education among engineers and underserved students, protecting our environment, and alleviating food insecurity. We look forward to continuing to promote sustainable growth and business practices as we move forward together. Thank you for your partnership and support.

Phil Snow

Chief Executive Officer, FactSet

Membership and Partnership

FactSet collaborates with local and international organizations to advance our ESG efforts and drive progress toward sustainable development. We are an active member of the following organizations:



United Nations Global Compact (UNGC): The UNGC is the world’s largest corporate sustainability initiative and calls for support from companies aligned to its ten principles on human rights, labor, the environment, and anti-corruption



Management Leadership for Tomorrow’s (MLT) Equity at Work: MLT’s Black Equity at Work and Hispanic Equity at Work supports employers in their journey toward racial equity by providing talent, recruitment, retention, and overall DEI strategy assistance



United Nations-supported Principles of Responsible Investment (UN PRI): The UN PRI consists of an international global network of asset managers, owners, and service providers working together to put responsible investment into practice



Human Rights Campaign (HRC) Business Coalition for the Equality Act: The HRC Business Coalition for the Equality Act includes businesses operating in all 50 states that employ over 9.8 million people and generate \$4.2 trillion in combined revenue. The Equality Act is proposed U.S. federal legislation that would protect LGBT+ persons from discrimination based on sexual orientation and gender identity in employment and on a range of public services, including housing, credit, juries, and more.

Awards and Recognitions



MSCI: FactSet is rated “AA,” among the top 39% of companies with AA – AAA ratings



FactSet was recognized as one of **Glassdoor’s** “Best Places to Work” in 2023



EcoVadis: FactSet won a “Silver Medal” in recognition of our impressive corporate sustainability practices



FactSet was featured in **Newsweek’s** “America’s Most Responsible Companies” list for 2023



CDP: FactSet scored “B-” for climate change disclosure in 2022, moving up a level from our “C” score in 2021

Highlights

Environment

Net Zero
by 2040 goal

SBTi
commitment
letter signed

Sustainable
Procurement
Policy
Developed

Silver
Medal
EcoVadis award
earned

Social

17K
Volunteer
hours

Glassdoor's
Best Places
to Work
recognition earned in 2023

Global
Pay Equity
review completed

286,000
employee learning hours

Best Place to Work
for LGBTQ+ Equality on the HRC
Corporate Equality Index

Governance

98%

of employees
completed training
on the Code of
Business Conduct
and Ethics

Updated Code of
Business Conduct
and Ethics

45K
hours of employee
security-related
training

Updated Enterprise
Risk Management
(ERM) Policy

Organization and Reporting Practices

FactSet Research Systems Inc. (“we,” “our,” “us,” the “company,” or “FactSet”) is a global financial data and analytics company with an open and flexible digital platform that drives the investment community to see more, think bigger, and do its best work. Our digital platform and enterprise solutions deliver financial data, analytics, and open technology to over 7,000 global clients, including approximately 180,000 individual users. Clients across the buy-side and sell-side, including wealth managers, private equity firms, and corporations achieve more every day with our comprehensive and connected content, flexible next-generation workflow solutions, and client-centric specialized support. FactSet was founded in 1978 and has been publicly held since 1996. Headquartered in Norwalk, Connecticut, we are proud to be a global company with offices in 20 countries on six continents. We all work together toward creating value for our clients, and we are honored that over 90% of clients who use FactSet continue to use it, year after year. FactSet reports earnings and financial results per fiscal year, beginning September 1 and ending August 31. The year associated to a fiscal year refers to the year on August 31, i.e., fiscal year 2022 started on September 1, 2021, and ended on August 31, 2022.

Our Values



Who We Are

We are a diverse, inclusive community unified by the FactSet spirit of going above and beyond. Our best ideas can come from anyone, anywhere, at any time.



How We Work

We roll up our sleeves to solve tough problems together. We learn from our successes and our failures and constantly push each other to do better.



How We Compete

Our clients see us as part of their team. We win as a team and celebrate our wins together.



What We Promise

We continuously look ahead to advance the future of our industry. We relentlessly seek value for our clients because their success is our success.



What We Aspire To

As big as we grow, as far as our reach, and as successful as we become, we stay connected to our clients and each other.



Sustainable Development Strategies, Policies, and Practices

FactSet is committed to sustainable growth for our clients, employees, partners, investors, and the communities in which we live and work. We continually monitor and improve our social practices, environmental and climate actions, and governance initiatives while maintaining and strengthening our relationship with our stakeholders. In fiscal 2021 we created a Sustainability Plan outlining our environmental, social, and governance (ESG) successes and goals for the future. During fiscal 2022, we reviewed our progress to date, recognized the areas of success, and identified additional areas of opportunity, which we detail throughout this report. This report has been prepared in accordance with the Global Reporting Initiative (GRI) Standards for the period September 1, 2021, to August 31, 2022.

We continually monitor and improve our social practices, environmental and climate actions, and governance initiatives while maintaining and strengthening our relationship with our stakeholders

Sustainability Committee

FactSet maintains an executive-sponsored Sustainability Committee that was established in fiscal 2021. The Sustainability Committee, including its five subcommittees, supports and executes our environmental, social, and governance goals and initiatives. The subcommittees consist of:

1. Environment and Facilities
2. Procurement
3. Employment, Total Rewards, and Training
4. Governance, Security, Ethics, and Policies
5. Annual Filings, Reports, and Communications

The FactSet Board of Directors oversees our ESG principles and implementation strategies while delegating day-to-day responsibility to the FactSet Executive Leadership Team (ELT). The ELT then provides direction to the Sustainability Committee for implementation. Each subcommittee meets regularly and reports out to the Sustainability Committee, which also oversees the publication and dissemination of relevant sustainability reports and information.

In January 2023, FactSet hired our first Sustainability Manager, Tobi Oyewole. Tobi will support the Sustainability Committee and its subcommittees, working to identify areas of collaboration across the groups, supporting annual reporting, and helping FactSet to improve and mature its sustainability initiatives.



Tobi Oyewole
Manager, Corporate
Sustainability

I am very excited to join FactSet, a company that is well recognized for its commitment to sustainable business practices. As we look to the future, I believe our business is well

positioned to continue creating positive change in the environment and communities where we operate.



Stakeholder Engagement

We actively engage with diverse internal and external stakeholders, including employees, clients, suppliers, investors, and communities. We participate in these engagements to help determine our material topics, set appropriate sustainability goals, communicate and assess our progress, and implement our strategy. We believe these engagements meaningfully shape our approach to sustainability and how we conduct our business overall. In addition, we review best practices and guidance from a variety of organizations advancing environmental, social, and governance standards, including rating organizations.

Reviewing Our Materiality Assessment

GRI defines material topics as “topics that represent the organization’s most significant impacts on the economy, environment, and people, including impacts on their human rights.” In fiscal 2022, we conducted a review of our previously defined material topics, building upon a gap analysis completed in fiscal 2021 to understand FactSet’s ESG strengths and opportunities. We used a double materiality approach, which recognizes that businesses should report both internal impacts (topics that influence enterprise value) and external impacts (topics that impact the overall economy, society, and environment).

We updated our material topics based on this review to better reflect the issues we feel may impact our business and performance as well as those that are important to our stakeholders.

These updates included:

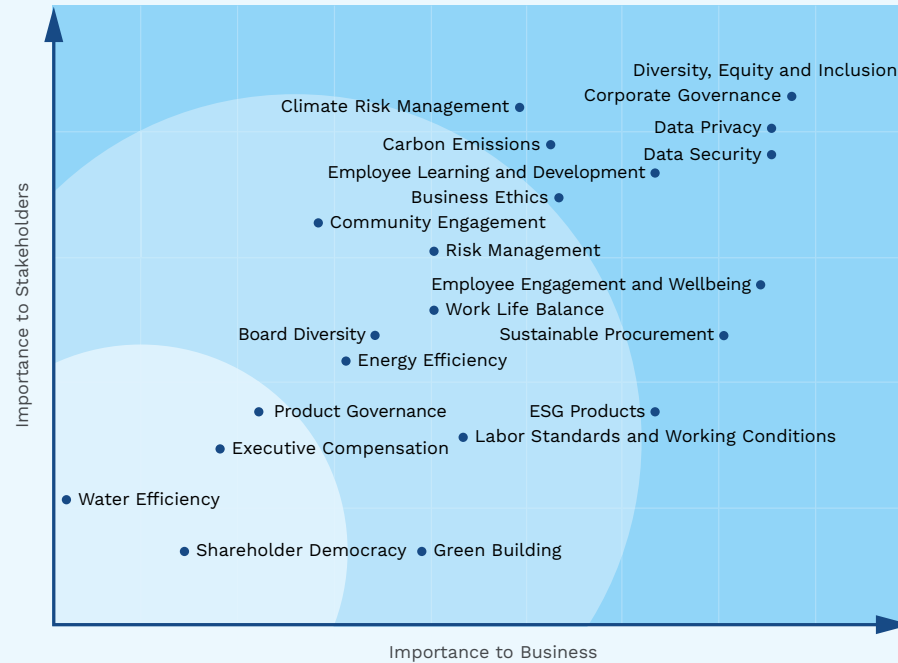
1. Data Privacy and Data Security are now reported and managed as separate topics, allowing for an increased focus on both topics.
2. We added Sustainable Procurement to our list of material topics. Much progress was made in fiscal 2022 to assess our supply chain and increase our Sustainable Procurement efforts.
3. We added an emphasis on Wellbeing to our previously defined Employee Engagement topic.

Of the 20 topics identified during our materiality review, we have prioritized 11 topics that are most important to our business and stakeholders.





Materiality Matrix



Material Topics:







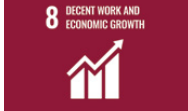
1. Diversity, Equity, and Inclusion
2. Corporate Governance
3. Data Privacy
4. Data Security
5. Carbon Emissions
6. Climate Risk Management
7. Employee Learning and Development*
8. Employee Engagement and Wellbeing
9. Sustainable Procurement
10. Business Ethics
11. ESG Products

* We have renamed the topic Human Capital Development, which was included in our 2021 Sustainability Report to Employee Learning and Development. This topic is otherwise unchanged.

UN Sustainable Development Goals

The [United Nations Sustainable Development Goals](#) (UN SDGs or the Global Goals) were adopted by the United Nations in 2015 as a universal call to action to end poverty, protect the planet, and ensure that by 2030 all people can enjoy peace and prosperity. With a total of 17 overarching goals, and each goal containing specific country-level targets and indicators to track progress towards the goals, the UN SDGs provide an opportunity to align business practices and corporate goals to these targets and indicators.

During fiscal 2022, FactSet continued making strides to increase its alignment with the UN SDGs. The table on this page and the next maps FactSet’s material topics to corresponding UN SDGs and company actions and/or initiatives.

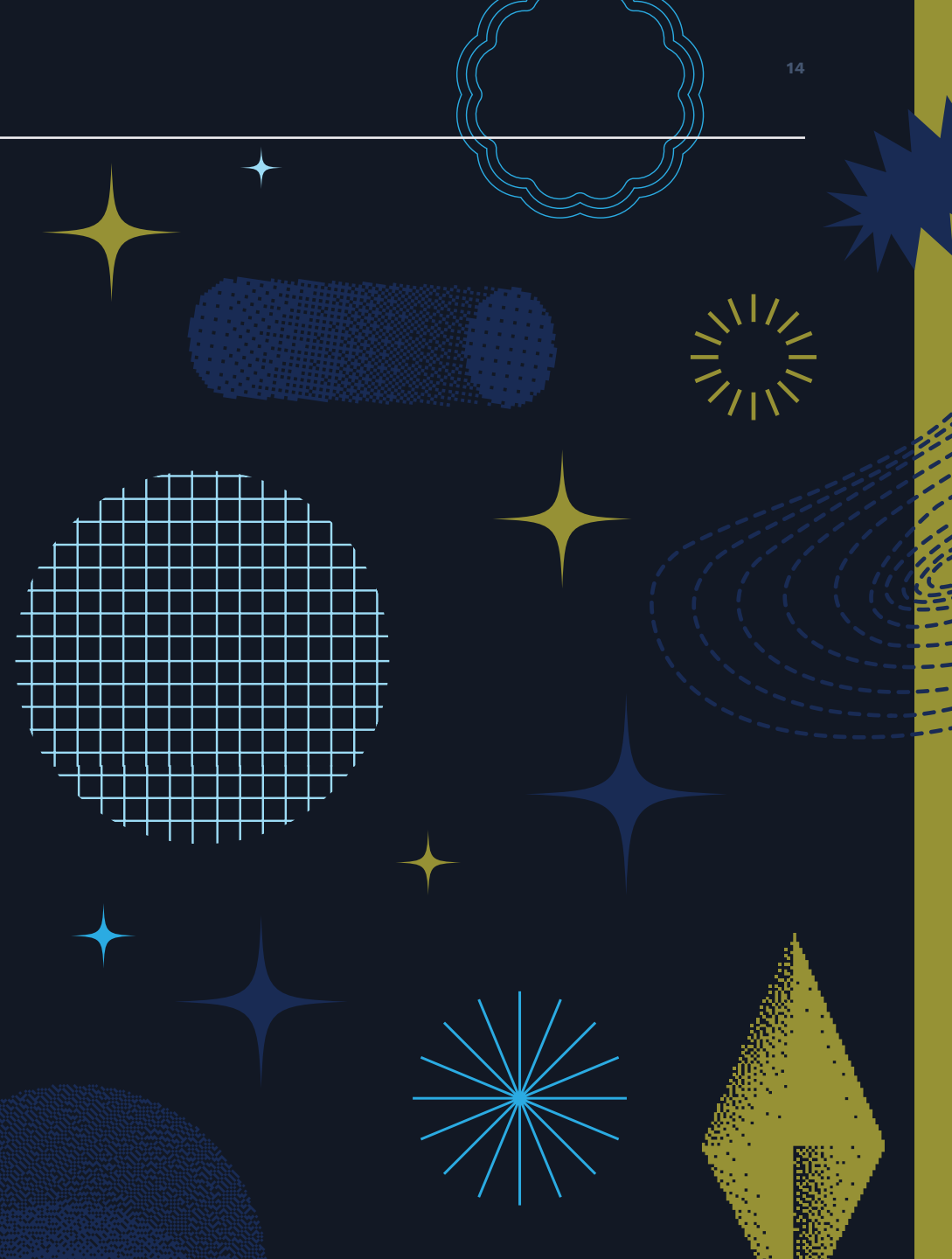
Material Topic	SDG	Description
Environment		
Carbon Emissions		Take urgent action to combat climate change and its impacts FactSet is monitoring Scope 1, 2, and relevant Scope 3 GHG emissions and developing a reduction plan to reduce its contribution to climate change. FactSet has committed to a near-term emissions reduction target in line with SBTi and, independently, has also set a goal of achieving net zero emissions by 2040.
Climate Risk Management		Take urgent action to combat climate change and its impacts FactSet is including climate risk in current risk assessment and management processes to plan to reduce the impact climate change may have on our business and operations.
Sustainable Procurement		Ensure sustainable consumption and production patterns FactSet has adopted a Global Procurement Diversity Policy and a Sustainable Procurement Policy and has begun assessing the sustainability of its supply chain.
Social		
Diversity, Equity, Inclusion		Reduce inequality FactSet offers opportunities for employees across all gender, race, ethnicity, and backgrounds. FactSet completed a pay equity review during fiscal 2022. After controlling for various salary-influencing factors, the study found no statistically significant association between salary and race/ethnicity in the U.S. The study found that, on a U.S. basis, minority employees are paid 100% on average of what non-minority employees are paid.
		Achieve gender equality and empower all women and girls FactSet completed a pay equity review during fiscal 2022. After controlling for various salary-influencing factors, the study found no statistically significant association between salary and gender worldwide. The study found that, on a global basis at FactSet, women are paid more than 99% on average of what men are paid. FactSet completed a pay equity review during fiscal 2022.
Employee Engagement and Wellness		Ensure healthy lives and promote well-being for all at all ages FactSet offers comprehensive benefits and wellness offerings to employees and continues to expand initiatives focused on employee health and wellbeing.
Employee Learning and Development		Promote sustained, inclusive, and sustainable economic growth, full and productive employment, and decent work for all FactSet is devoting resources to training and professional development opportunities for professional growth among employees.



Material Topic	SDG	Description
Governance		
Data Privacy		Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions at all levels
Data Security		FactSet has a comprehensive cybersecurity program designed to protect our enterprise environment, manage cyber risk, and maintain compliance.
Business Ethics		Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions at all levels FactSet updated its Code of Business Conduct and Ethics in fiscal 2022 and is devoting resources to promoting ethical business practices.
Corporate Governance		Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions at all levels FactSet ensures that governance at all levels, including the highest levels, is executed sustainably and equitably.
ESG Products		Ensure sustainable consumption and production patterns FactSet creates products that allow clients to make sustainable investment decisions.

Environment

- Highlights
- Environmental Sustainability
- Carbon Emissions
- Climate-Related Risks
- Waste
- Sustainable Procurement



Highlights

Net Zero 
by 2040 goal

Science Based Targets initiative
(SBTi) letter of commitment signed

Sustainable Procurement Policy Developed 

Scope 3 GHG screening conducted for the first time

Silver Medal 
EcoVadis award earned

 132 Metric
tons of e-waste recycled

Environmental Sustainability

At FactSet, we believe we have the responsibility to minimize our environmental impact, which is why measuring and reducing our carbon footprint is central to our environmental efforts. Continuing to calculate and report on our greenhouse gas (GHG) inventory while implementing programs to reduce our total emissions are significant business objectives. Greenhouse gas emissions contribute to climate change, which can negatively impact many aspects of society through changes in temperature, precipitation, and extreme weather events like fires, droughts, and floods. We take these risks seriously and recognize our ability to impact and reduce our contribution to climate change.

FactSet is committed to being a responsible steward of the environment through our sustainability initiatives, actions, and reporting, and we are currently working on setting appropriate targets and reduction strategies. The Environment and Facilities subcommittee of our Sustainability Committee, a global team of employees from various departments and locations, assists in establishing and implementing these strategies. FactSet aims to address environmental impacts in a collaborative way that engages all of our stakeholders, especially our employees.

FactSet is committed to being a responsible steward of the environment and climate through our environmental initiatives, actions, and reporting

In fiscal 2022, we continued to refine the management of our most material environmental topics in furtherance of our commitment to both understanding and minimizing our environmental footprint. We continued to calculate, verify, and publicly disclose our GHG Scope 1 and Scope 2 emissions. In addition, we conducted a screening of our most significant categories of Scope 3 emissions using 2021 and 2022 data. During fiscal 2022, we strengthened our commitment to reducing our environmental footprint by publicly announcing our intention to set near-term, company-wide emission reduction target in line with the [Science Based Target initiative \(SBTi\)](#). In addition to committing to SBTi, FactSet also announced during fiscal 2022 our goal of achieving net zero emissions across Scopes 1 and 2 by 2040.

We are actively working to reduce our environmental impacts through adopting sustainable policies, working to procure renewable energy, and operating out of green buildings whenever practical. Since the launch of the Environment and Facilities subcommittee last year, we have progressed toward the selection of climate targets and the development of appropriate emissions reduction strategies.



Carbon Emissions

Scope 1 and Scope 2 Emissions

FactSet has continued to assess the impact of its GHG emissions by calculating and reporting its Scope 1 and Scope 2 emissions across its operational boundary in line with the ISO 14064-1 standard and the Greenhouse Gas Protocol: Corporate Accounting and Reporting Standard.* Our Scope 1 and Scope 2 emissions calculations for our fiscal years 2019-2021 have been third-party validated to the ISO 14064-1 standard. During fiscal 2022, FactSet refined our internal process for continually tracking consumption data across all facilities to streamline and better manage the data needed to evaluate our emissions impact. We leveraged these improved data collection methods to achieve better insight into emissions reduction opportunities and the extent of their potential impact.

GHG emissions represent one of FactSet’s most material environmental topics. We recognize the importance of quantifying our Scope 1 and 2 emissions. Scope 1 accounts for emissions that an organization is directly responsible for. Scope 2 accounts for indirect emissions that the organization is responsible for, including but not limited to electricity usage. Monitoring our emissions allows us to better understand where our emissions come from and where there are opportunities for reduction measures. We continued to implement environmental practices that encourage more efficient energy use, as purchased electricity currently accounts for the largest contribution to our GHG emissions.

SCOPE 1 AND SCOPE 2 GHG INVENTORY

Fiscal Year	Scope 1 (MT CO2e)	Scope 2 (MT CO2e)	Total (Scope 1 + 2) (MT CO2e)
2019	3,763.95	11,520.88	15,284.83
2020	1,011.47	10,750.91	11,762.38
2021**	647.35	5,374.08	6,021.43
2022	1,796.03	6,400.26	8,196.28

Total Scope 1 and Scope 2 emissions in the reporting year increased from the previous year. We believe that this increase was attributable in large part to the gradual return to in-office operations as COVID-19 restrictions were lifted. For example, the transportation we provide to employees in Hyderabad, India, and Manila, Philippines was greatly limited in fiscal 2020 and 2021 due to the mandatory remote work environment. However, this service resumed in fiscal 2022, causing emissions associated with transportation to increase. In addition, we recorded a significant increase in Scope 2 emissions in our Hyderabad location as a result of the return to “in-person” work. While our Scope 1 and Scope 2 emissions increased from fiscal 2021 to fiscal 2022, our total emissions remain well below pre-pandemic levels.



* Operational control was used to establish organizational boundaries. The organizational boundary includes leased offices and data centers. Reporting boundaries include Scope 1 and Scope 2 emissions. Emissions included in these calculations include all direct and indirect emissions resulting from FactSet’s operations with sufficient data within the reporting period and organizational and reporting boundaries.

** Figures have been restated due to changes in third-party emission factors used in calculating emissions for certain offices, and improved data collection in some of our facilities.



Scope 3 Emissions

For the first time, FactSet has completed a Scope 3 emissions screening, covering both calendar years 2021 and 2022 data. We recognize that the emissions associated with our value chain are essential to understanding our overall carbon footprint. In fiscal 2022, FactSet completed our Scope 3 screening using the Greenhouse Gas Protocol's Quantis Scope 3 Evaluator tool to identify our most significant sources of 2021 Scope 3 emissions, and we did the same for 2022 Scope 3 emissions in fiscal 2023. The Quantis tool estimates Scope 3 emissions for each relevant Scope 3 category using a spend-based method. Through the screening of the calendar year 2021 and 2022 Scope 3 emissions, we identified purchased goods and services (including capital goods) as the primary source of our Scope 3 emissions. We also identified employee commuting and business travel as contributors to our calendar year 2021 and 2022, Scope 3 emissions, although at considerably lower levels than purchased goods and services. In fiscal 2023 we are working towards collecting primary data where possible.

We are developing a survey to distribute to employees to gather information regarding their modes of transportation, the approximate distance they travel to and from the office, and frequency of working at the office

Purchased Goods and Services

We conducted our calendar year 2021 and 2022 Scope 3 screening of purchased goods and services applying the Greenhouse Gas Protocol's spend-based calculation method, using inflation-adjusted, cradle-to-gate emissions factors from the U.S. EPA's Environmentally-Extended Input-Output (US EEIO) database and FactSet's purchasing records. Any capital good purchases have been accounted for under this category of purchased goods and services. In 2023 we plan to collect primary data from our suppliers to gain more precision in our Scope 3 calculations utilizing our supplier questionnaire and CDP responses to identify opportunities to decarbonize throughout our supply chain.

Employee Commuting

Employee commuting was another relevant Scope 3 category based on the results of our Scope 3 screening of calendar year 2021 and 2022. To gain a better understanding of our emissions associated with employee commuting, we are developing a survey to distribute to employees to gather information regarding their modes of transportation, the approximate distance they travel to and from the office, and frequency of working at the office. Since the Greenhouse Gas Protocol: Technical Guidance for Calculating Scope 3 Emissions provides that emissions associated with employee teleworking falls under the employee commuting category of Scope 3 emissions, the survey also will contain questions regarding the average number of days per week each employee works from home. We plan to utilize the data obtained through the survey to estimate the energy consumption and emissions impacts of remote work using regional emission factors.

Business Travel

Due to the COVID-19 pandemic, business travel came to a halt in fiscal 2020 and remained low in fiscal 2021 and 2022. As business travel has begun to increase, we are working to determine how to best gather primary data to quantify and manage our business travel-related emissions.



Initiatives

GHG Reduction Targets

FactSet understands the importance of setting targets and monitoring our progress against these targets as a means for reducing our company-wide climate impact. We have committed to setting a near-term, company-wide emissions reduction target following the guidelines laid out by SBTi, an organization helping companies to set and achieve emissions reduction targets in line with the Paris Agreement. Per our letter of commitment to SBTi, we will set our company-specific target within the next two years and develop a plan for achieving the target by the specified year. FactSet is currently in the process of developing our emissions reduction plan to meet a near-term target in line with SBTi. FactSet signed the SBTi letter of commitment in July 2022, and we plan to submit our proposal no later than July 2024.

Independent of our commitment to set a near-term SBTi target, during fiscal 2022 FactSet also set a goal of achieving net zero [Scope 1 and Scope 2 emissions by 2040](#). In pursuit of this goal, we are developing a plan aimed at reducing our Scope 1 and 2 emissions as close to zero as possible, then offsetting any residual emissions.

Renewable Energy Program

FactSet is investigating our opportunities to purchase renewable electrical energy to help reduce our GHG emissions. While FactSet operates out of green buildings when possible, we are a lessee at all of our locations, and as a result, we are restricted in our access to on-site renewable assets. Given this limitation, we have looked into establishing a budget for the purchase of renewable energy credits (RECs). We plan to purchase only RECs that are Green-e Certified, or that have similar qualities to Green-e Certified RECs, with the objective of ensuring that the power purchased is directly generated from a renewable asset and is retired after purchase.

FactSet is investigating our opportunities to purchase renewable electrical energy

Green Buildings

We continue to manage operations responsibly by emphasizing the importance of green buildings and improving upon previous practices to increase the efficiency of operations across all of our facilities. Of FactSet's array of global locations, 13 buildings have obtained LEED or LEED-equivalent (e.g., BREEAM) certification.

Climate-Related Risks

FactSet understands that even with a reduction in greenhouse gas emissions, effects from climate change are still likely to impact our business and operations, especially given our global presence. We must adapt and prepare for the impacts that will arise because of climate change. FactSet is in the process of conducting a climate risk assessment to identify the likelihood of future climate-related hazards and assess their potential impacts on our business. As part of this process, we are assessing both transition risks (risks associated with a transition to a low carbon economy) and physical risks (risks associated with changing temperatures and weather patterns). The specific climate-related risks we are analyzing were selected in part by following the guidance issued by the [Task Force on Climate-Related Financial Disclosures](#) (TCFD).

Our assessment of these risks includes analyzing both the probability of the risk and the potential magnitude of its impact on our business. We are conducting this analysis under different climate scenarios and over different time horizons: short, medium, and long. This type of analysis is intended to ensure we capture appropriate risks and effectively prioritize any mitigation efforts as we plan. We plan to incorporate the climate risk assessment results into our Enterprise Risk Management (ERM) process.

Transition and Physical Risks

We are assessing transition risks spanning four categories: policy and legal regulations, technology, changing markets, and reputation. We are assessing several potential risks within each of those categories and mapping those risks against the Shared Socio-economic Pathways (SSPs) to identify their likelihood, and possible impact.

In addition to considering transition risks, we have begun assessing physical risks. We are assessing such risks across acute events (primarily droughts, floods, freezes, tropical cyclones, winter storms, and wildfires) and chronic events (including changing temperature, changing precipitation patterns, sea level rise, and water stress). We are using the Representative Concentration Pathways (RCPs) to assess identified physical risks and how such risks change under various scenarios.



Climate Transition Risks and Physical Risks: Additional Detail

In our assessment of transition risks, we use three Intergovernmental Panel on Climate Change (IPCC) Shared Socioeconomic Pathways (SSPs): SSP1-2.6, SSP2-4.5, and SSP5-8.5. In our assessment of physical risks, we use four IPCC Representative Concentration Pathways (RCPs): RCP2.6, RCP4.5, RCP6.0, and RCP8.5. We chose SSPs that span a range of possible future climates and which correspond to the RCPs we selected. At a general level, SSP1-2.6 and RCP2.6 represent a future with low challenges to climate mitigation and adaptation, SSP2-4.5 and RCP4.5 represent a future with moderate challenges, and SSP5-8.5 and RCP8.5 represent a future with high challenges. RCP6.0 is another intermediate pathway, like RCP4.5, but with a higher warming temperature potential.

In our analysis of transition risks, we are finding that policy and legal regulations risks are more likely to occur and have a higher impact under SSP1-2.6 than under SSP5-8.5. Our analysis suggests this is likely a result of necessary policy and regulatory changes that are required to support a future in

which global temperature rise stays well below 2°C. Our analysis of technology risks is following a similar trend, likely for similar reasons—the necessity of technological changes to support a future in which global temperature rise stays well below 2°C. Our analysis of market risks shows different likelihoods and impacts across different scenarios, likely due to the nature of the two risks captured by the overarching category of market risks—consumer and stakeholder influence risks behave differently from risks associated with the cost of raw materials. Lastly, in our analysis, reputation risks stay relatively consistent across different scenarios.

In our analysis of physical risks, we are finding that several acute and chronic risks are more likely to have a higher impact on the company under RCP8.5, the pathway with the highest warming potential temperature, than RCP2.6, the pathway with the lowest warming potential temperature.





Waste

We generated approximately 2,500 metric tons of waste in fiscal 2022. We are working to recycle our waste, and in fiscal 2022, we recycled or reused over 150 metric tons of waste. Internal policies exist within FactSet for treating office furniture and electronics at the end of their life. Where the necessary services are available, office furniture in reasonable condition is offered to the office staff, then to the other tenants in the building, and finally to local non-profits. The remaining equipment is then removed by a third-party office decommissioning company with the understanding that everything hauled away will first be resold/reused, recycled, and after those activities, the remainder is sent to a landfill. For electronics (e-waste), third-party vendors are utilized to ensure that destruction is done in an environmentally friendly manner consistent with local requirements. Current estimates are that approximately 132 metric tons of e-waste, including batteries, out-of-date electronic equipment, and other such materials, was recycled in fiscal 2022 by FactSet to prevent harmful metals from being dispersed into the environment. To limit the amount of paper entering landfills, all FactSet facilities partner with local paper shredding services that recycle all received waste.



CDP, formerly known as Carbon Disclosure Project, is a non-profit disclosure platform aiming to increase awareness and disclosure of each organization's impact on climate, forests, and water. FactSet completed the CDP Climate Change Questionnaire for the second year in a row in fiscal 2022. We improved our score to a B- from a C in 2021.

WASTE RECYCLING

Material	Metric Tons* in Fiscal 2022
Recycled e-Waste	132
Recycled Waste	36
Recycled Paper	3
Recycled and Reused Furniture	3
General Waste (Landfill)	2,614

*Approximate tons based on waste hauler receipts.



Sustainable Procurement

In fiscal 2022, FactSet dedicated time and resources to maturing our sustainable procurement initiatives, overseen by the Procurement subcommittee of our Sustainability Committee. With the hire of a Supplier Relations and Programs Manager in fiscal 2022, FactSet continues to advance its sustainability goals across our value chain. Building on FactSet's existing [Supply Chain Code of Conduct](#), the Procurement subcommittee also created a Sustainable Procurement Policy, Global Procurement Diversity Policy, and an ESG-focused supplier questionnaire. The supplier questionnaire will be mandatory for new suppliers, and suppliers must also agree to abide by FactSet's Supply Chain Code of Conduct.

Supply Chain Code of Conduct and Policies

FactSet engages with our global suppliers to ensure they, and their respective supply chains, uphold standards of ethics and conduct in accordance with [FactSet's Supply Chain Code of Conduct](#). Our Supply Chain Code of Conduct emphasizes our core sourcing principles for selecting suppliers, as well as our expectation that our suppliers uphold:

- Ethical business practices
- Human rights
- Workers' rights
- Environmental management
- Proprietary and privacy rights

To complement our Supply Chain Code of Conduct, FactSet adopted a Sustainable Procurement Policy to guide our internal procurement team on purchasing decisions. Our Sustainable Procurement Policy is grounded in the [Six Principles of Responsible Investment](#) as well as the [Ten Principles of the UN Global Compact](#). Our Sustainable Procurement Policy covers ESG requirements for our suppliers, including topics such as prohibiting child labor, respecting the right to freely associate and collectively bargain, and adhering to responsible environmental management. Our Sustainable Procurement Policy also encourages suppliers to share their ESG data, including their greenhouse gas inventories, with FactSet upon request.

In the past year, FactSet also formalized its commitment to increase supplier diversity by adopting our Global Procurement Diversity Policy and initiating our Supplier Diversity Program. The primary goal of this policy and program is to provide greater access and opportunities to diverse suppliers that meet our procurement and contractual standards. To track progress toward meeting our goal, our procurement team determined our baseline of diverse direct supplier spend, including our spend on small businesses and businesses owned by historically disadvantaged or underrepresented groups, to use as a benchmark moving forward.

Risk Management

In fiscal 2022, FactSet hired an independent, third-party consulting firm to conduct an ESG risk assessment of our direct suppliers to assist us with mitigating any potential ESG risks from our supply chain. The risk assessment evaluated suppliers based on the category of goods or services supplied, the supplier's country of origin, and FactSet's annual spending with the supplier. From the risk assessment, FactSet identified select suppliers for whom we requested a rating from EcoVadis, a sustainability rating service. FactSet used the [EcoVadis](#) platform for deeper understanding of the select suppliers' environmental, labor and human rights, ethics, and procurement impacts.

Scope 3 Emissions

FactSet's Environmental and Procurement subcommittees collaborated to screen FactSet's Scope 3 emissions, in alignment with the Greenhouse Gas Protocol's Scope 3 Standard. As detailed in the Carbon Emissions section on [page 17](#), purchased goods and services are a significant amount of FactSet's Scope 3 screening and as such, FactSet will continue to work with suppliers to encourage them to measure and reduce their emissions as part of our effort to curb emissions across our value chain.

Onboarding Questionnaire

FactSet is working to ensure our supplier onboarding process incorporates ESG considerations and requirements by initiating a supplier questionnaire to evaluate prospective suppliers' sustainability commitments and practices. A pilot group of suppliers has tested the questionnaire, and improvements have been made based on their feedback. We plan to launch the questionnaire company-wide for new suppliers during fiscal 2023.

ecovadis

EcoVadis is a provider of business sustainability ratings, intelligence, and collaborative performance improvement tools for global supply chains. In the 2022 rating, FactSet scored 64 and ranked in the 87th percentile. FactSet was also awarded the "Silver Medal" in recognition of its impressive corporate sustainability practices.

Future Events and Initiatives

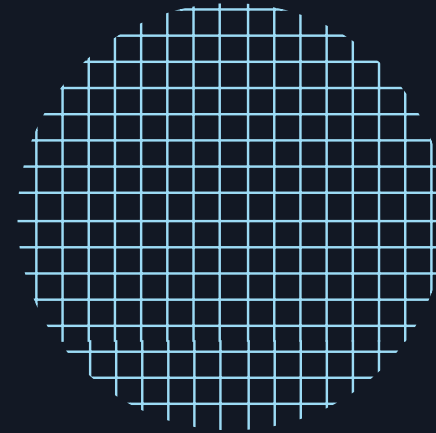
Supplier Diversity

Building on the baseline of our supplier diversity spending, we will align with key stakeholders to define target categories for increasing spending with diverse suppliers. The Procurement subcommittee plans to determine a diversity spend target to grow our diversity, equity, and inclusion (DE&I) efforts beyond our direct operations and support our commitment to fostering a globally-inclusive culture.



Social

- Highlights
- Diversity, Equity, and Inclusion
- Employee Learning and Development
- Community and Volunteerism
- Employee Engagement and Wellbeing



Highlights

Glassdoor's Best Places to Work

recognition earned in 2023

Global Pay Equity

review completed

17K Volunteer Hours

Best Place to Work

for LGBTQ+ Equality on the HRC Corporate Equality Index

89%

Response Rate on Engagement Survey

Best Companies for Women

and Best Technology Company list placement by Fairygodboss in 2022

1,750 Hours

total hours of learning on sustainability

Global Gender Inclusivity

policy launched to support FactSet's respect for the rights and identities of all employees

Diversity, Equity, and Inclusion

Factset's commitment to Diversity, Equity, and Inclusion (DE&I) begins with our CEO and the support of the entire FactSet leadership team. We recognize that our internal and external stakeholders value DE&I to increase our overall global relevance and to positively impact the communities in which we operate. As a cornerstone of our DE&I strategy, FactSet's Global DE&I Council consists of executive leaders across FactSet who are empowered to drive strategic action and accountability to produce results. In addition, many senior leaders serve as Executive Sponsors for our Business Resource Groups (BRGs), thereby increasing the visibility of these employee networks.

As part of FactSet's core values, we are committed to advancing diversity, equity, and inclusion at every level. To this end, we have developed a global DE&I strategy that provides the framework for our three impact areas: Workforce, Marketplace, and Society. We are proud of the positive progress we have made in each of these areas as we continue to take actionable steps through strategic initiatives, programs, and resources to support our global workforce and communities.

DE&I at FactSet has been prioritized and elevated through our DE&I Council, which we refreshed in 2022. The Council is chaired by our CEO, Phil Snow, and consists of 13 executive leaders who are empowered to drive our DE&I progress and create strategic accountability for DE&I results. We have evolved our DE&I Council governance to accelerate decision-making, reflect our organizational structure, and meet our current needs.

As part of this visible leadership commitment, FactSet continues to deliver on our efforts outlined within the CEO Action for Diversity and Inclusion Pledge, which connects us with over 2,000 companies actively supporting more inclusive workplaces and communities. In addition to signing the pledge, we supported the annual Day of Understanding and sponsored two employees to participate full-time in the CEO Action for Racial Equity Fellowship, allowing FactSet to take an active part in advancing policy in the United States.

DE&I Accountability Goals embedded into annual performance appraisals for all employees



Vinay Kapoor
Global Chief Diversity,
Equity, and Inclusion Officer

Looking back on fiscal 2022, I am encouraged by the progress we've made and I am excited for our continued journey. I believe that DE&I is a marathon, not a sprint, and requires daily learning, growing, and strategic decision-making—which we are doing—to affect real change. It is an honor to have the full support and commitment of our CEO and senior leadership, the significant contributions of our BRGs, and the dedication of our global DE&I team, all of whom work in partnership to drive our DE&I strategy and help bring it to life. As we've collectively seen many accomplishments, there's still more to be done as we keep moving forward to further deepen our impact along FactSet's DE&I journey.



Global DE&I Strategy

Impact Areas And Levers



Delivering on our three impact areas of Workforce, Marketplace, and Society—we are building a globally diverse, equitable, and inclusive workplace where all FactSetters feel a sense of belonging while creating economic opportunity in the marketplace and positive change through social justice in our communities

Workforce

Transparency & Accountability

Publishing our workforce demographics, including our annual EEO-1 federal data, continues to be an integral part of our DE&I journey at FactSet. By reporting our workforce demographics, we make a visible step in our DE&I commitment as we aspire to measurably change the composition of our employee demographics to better represent our global communities.

For fiscal 2023, we are launching DE&I Accountability Goals which apply to all employees as part of their annual performance goals. We understand that in order to make sustained progress on our journey, embedding DE&I accountability at all levels across the organization is vital while intentionally supporting our DE&I strategy of transparency and accountability. These company-wide DE&I goals include efforts such as increasing workforce representation, sharing DE&I topics in team meetings, participating in DE&I programming and learning sessions, adhering to inclusive hiring best practices, and completing Unconscious Bias training. These goals are allocated by level and are part of our efforts to actively support FactSet's overall DE&I journey.

Performed Gender Pay Equity Review to ensure accountability in people processes

People Processes

In fiscal 2022, we continue to embed DE&I into our talent processes, including performance reviews, promotions, and recognition.

As a key component to drive and ensure fair and equitable administration of pay, in fiscal year 2022, we completed a Global Pay Equity Review. We engaged an outside firm to assess the degree of systemic gender equity in the salaries of our employees worldwide and the degree of systemic race/ethnicity equity in the U.S. After controlling for various salary-influencing factors, the study found that there was not a statistically significant association at our company between salary and gender worldwide, or between salary and race/ethnicity in the U.S. The study found that, on a global basis at our company, women are paid more than 99% on average of what men are paid and that, on a U.S. basis, minority employees are paid 100% on average of what non-minority employees are paid. Following this assessment, we will continue to keep pay equity as a DE&I priority.

To further our continued investment in DE&I, we also launched the Business Resource Group (BRG) Recognition Program. We know that our BRGs play a crucial role in contributing to a more engaged and inclusive workplace and the BRG Recognition Program recognizes and celebrates BRG leaders for their hard work, dedication, and leadership of programming that inspires and engages colleagues around the world. Furthermore, we have also added BRG leadership performance into applicable annual employee performance reviews and have established annual equity awards for all BRG Co-chairs as well as notable BRG Steering Committee members who have gone above and beyond in their roles.

We have launched the Global Gender Inclusivity Policy and supporting resources which enables us to provide a safe, supportive work environment where all rights and identities are respected and protected. As stated in this policy, FactSet will not tolerate discrimination on the basis of gender identity or gender expression, and we believe that all FactSetters have the right to be addressed by their chosen name and the pronouns that correspond to their gender identity or expression, no matter where in the world they are based.



Retention & Advancement

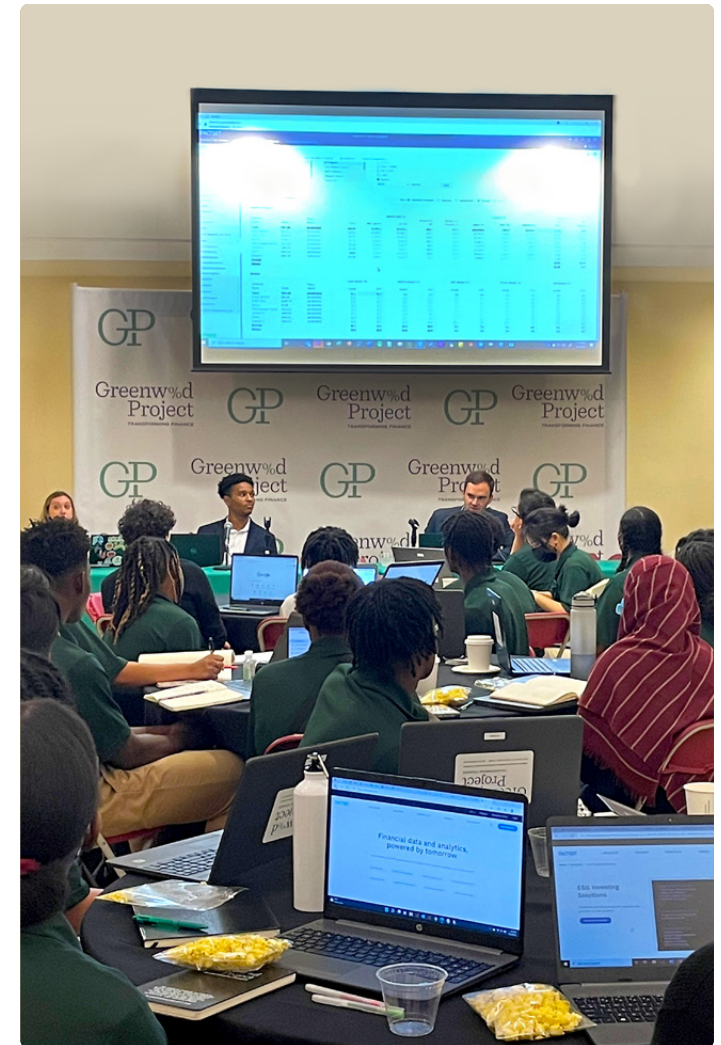
Sponsorship Initiative – Through this program, we are embedding a company-wide culture of sponsorship that creates equitable opportunities for those seeking career advancement. With a focus on enhancing growth opportunities and retention, we actively designed architecture to position our Sponsorship Initiative for long-term success. In the first cohort, we are helping to facilitate sponsorship relationships between executive and senior leaders. Sponsors are asked to identify two people to sponsor, with one identifying differently across the lines of gender and/or race while also being mindful and inclusive of all other identities and regions. This requirement helps create equitable opportunities for all those seeking career mobility by promoting proactive, reciprocal, sustained relationships between Sponsors and Sponsees that can be greatly beneficial for both parties. In fiscal 2023, we began rolling out the Sponsorship Initiative, which we will do in three phases to include all levels of our organization eventually.

Roundtables – We continue to look for ways to improve and better support underrepresented talent at FactSet. With this goal, we held roundtable discussions with our Black and Latinx senior leaders to provide a platform to discuss the employee experience with our CEO and other executive leadership. We understand that it is imperative to listen and learn about the lived experiences and perceived challenges of our underrepresented talent to help guide our future strategic actions. Each roundtable discussion yielded valuable feedback that was compiled into reports to be evaluated by our executive leadership panel. In the next phase, we plan to hold leadership roundtable discussions focusing on women in leadership and technology.

Recruitment

Our recruitment efforts are focused on hiring talent representative of our global communities by bringing diverse backgrounds, perspectives, and experiences to our company. FactSet's diversity recruiting strategy is supported by multiple partnerships connecting us with a wide range of universities, associations, and organizations, as well as a fair and equitable process to deliver diverse candidate slates for all positions. Our global Talent Acquisition team has been trained in best practices for developing inclusive job descriptions, prioritizing candidate evaluation criteria, and dismantling bias in the interview process. Through engagement and partnerships, we develop annual recruitment strategies so that FactSet is seen as an employer of choice for all.

Following the fiscal 2021 launch of our MESH (Mentor, Engage, Support, and Hire) Externship Program, a recruitment effort that brings together underrepresented students with a common interest in the Financial Technology (Fintech) industry, we have expanded the program into the UK by partnering with upReach, a UK-based organization focused on the social mobility of students from disadvantaged backgrounds. This partnership has provided more opportunities to source candidates in collaboration with our Corporate Social Responsibility team. With a continued focus on Black, Latinx, and Native American talent, we have been able to help mentor, engage, support, and hire first or second-year college students interested in finance, technology, and/or client service.



Business Resource Groups (BRGs)

BRGs are employee-led networks that provide volunteer leadership opportunities for employees to develop and implement programming aligned to the company’s business and DE&I initiatives. While each BRG focuses on a specific dimension of diversity, all are guided by our core value of inclusion and are open to all employees, regardless of cultural background, sexual orientation, or origin. Our BRGs play a crucial role in contributing to a more engaged and inclusive place to work for all FactSetters and support the recruitment, development, and retention of our diverse workforce with participation open to all employees.



The Asian BRG celebrated Asian American Native Hawaiian and Pacific Islander Heritage Month through partnering with speakers and internal panelists on the theme of “Advancing Leaders Through Collaboration”. The group also organized local events, such as creating uplifting notes for lunch packages sent to Asian elders facing food insecurity or isolation. Through efforts such as this, the group spreads awareness about challenges and provides a platform to connect and uplift the Asian American community.



The Black BRG presented an Employee Spotlight series in recognition of Black History Month where the group increased awareness by aligning to the theme of Black Health and Wellness through a variety of educational events. The group also hosted an interactive virtual tour exploring historic landmarks and the significance of Emancipation Day in celebration of Juneteenth. Further promoting visibility and awareness, the group continues to engage the workforce through programming that informs and supports racial justice, provides resources for leadership development, and empowers Black employees to reach their full potential.



The Families BRG provided support and acknowledgment of employees with family responsibilities through a series of open conversations on topics about caring for families of all forms while balancing professional life. The group also built upon the Buddy Scheme program that helps establish new employee relationships among parents and caregivers. To further promote inclusion, the group continues to help foster a supportive environment for employees with family and care responsibilities by providing resources for balancing careers and home life.



The Latinx BRG hosted multiple events celebrating Latinx Heritage Month which engaged employees through various learning opportunities, including a panel discussion, virtual tour, Cafecito, and keynote speaker. The group also partnered with Latinas in Tech, a non-profit organization connecting Latina women in the industry, where they shared insights on negotiating in the workplace. To broaden awareness, the group continues to develop programming designed to enrich company culture and increase leadership opportunities.

Black and Latinx senior leaders invited to roundtable discussions with the CEO and executive leadership to discuss the employee experience in order to support and advance underrepresented talent



Established the Business Resource Group (BRG) Recognition Program, which recognizes BRG leadership contributions through annual equity awards and performance reviews



The Multicultural BRG recognized South Asian Heritage Month with a keynote speaker event and celebrated Black History Month (EMEA) by aligning with the theme, Time for Change: Action Not Words, and presenting an inspirational keynote event. The group also celebrated global diversity by bringing together employees in multiple office locations to enjoy a fun and interactive FactSet Feast featuring multicultural cuisine, culture, and heritage. With a global perspective, the group continues to help create a welcoming environment for people to be truly authentic at work.



The Pride BRG hosted events in all regions aligned with the theme, Rising Together with Pride, in celebration of Pride Month, including virtual sessions, in-person social events and parade participation. The group also recognized many LGBTQ+ focused awareness days throughout the year, such as World AIDS Day, Transgender Day of Remembrance, National Coming Out Day, Bi-Visibility Day, and more. The group also helped support the development of our Gender Inclusivity Policy and resources. With global collaboration, the Pride BRG continues to help create a workplace where everyone is celebrated, respected, and valued.



The Veterans BRG hosted events and recognized Memorial Day, Veterans Day and Remembrance Day through inspiring sessions and opportunities to raise awareness about men's health. The group also continued the American Corporate Partners (ACP) program which focuses on supporting veterans and their spouses as they transition into civilian life through online career advice and individual mentoring.



The Women's BRG presented multiple events in celebration of Women's Month and International Women's Day with keynote and panel discussions aligned to the 2022 theme, Break the Bias. The group also presented a host of regional events focused on topics including negotiation skill development, domestic violence awareness, and compensation while also engaging the workforce in various discussions on gender diversity and equity. In efforts to advance a culture of inclusion, the group continues to elevate women through professional development, educational programming, and networking opportunities.

Inclusive Education

Inclusive education continues to be a priority for us. We provide a variety of educational opportunities through new learning sessions from our Interfaith Education series, Unconscious Bias Training (which is part of company-wide goals for all employees), and Racial Justice Allies, a program that leverages the influence of employees serving as diversity champions.

Racial Justice Allies (Global)

The Racial Justice Allies (RJA) initiative at FactSet aims to raise awareness of how those around us experience racism. The RJA program is led by the DE&I team in partnership with the Learning & Development team to empower colleagues to better understand racial injustice and privilege, exploring how we can take active steps to become more supportive and authentic allies through a series of small group “book club” discussions, webinars, and listening circles.

Interfaith Education Series

The Interfaith Education Series aims to navigate cultural and religious diversity in the workplace. For employees of all faiths and none, we understand that religion and beliefs are a part of life that shows up in the workplace. FactSet is committed to developing a company culture that proactively engages religious diversity by providing employees with the opportunity to intentionally learn about one another and see the strength of genuine workplace acceptance.

The Interfaith Education Series currently includes the following learning sessions:

- Navigating Religious Diversity in the Workplace
- Interfaith Panel Discussion
- Exploring Antisemitism
- Exploring Islamophobia
- Interfaith Education: HRBP Best Practices

Marketplace

In fiscal 2022, we created a Supplier Diversity function, expanding our DE&I efforts by performing an audit of minority-owned spend and suppliers to help us set meaningful goals and to develop an inventory of suppliers that reflect our diverse workforce and communities. This function was established in collaboration with the Procurement subcommittee of our Sustainability Committee.

A core principle of our Marketplace impact area is collaboration with clients. To engage our clients in DE&I efforts, we have extended our DE&I programming and events to our client base. In fiscal 2022, we continued to welcome FactSet clients to attend BRG virtual events designed to educate further and promote cultural awareness.

Society

CEO Action for Diversity and Inclusion Pledge

CEO ACTION FOR DIVERSITY & INCLUSION We continue our work through actionable steps in fulfilling our commitment to the CEO Action for Diversity and Inclusion Pledge.

We are a strategic partner in rallying the business community to advance diversity and inclusion within the workplace by working collectively across organizations and sectors. We have incorporated specific actions as a participating company to cultivate a trusting environment where all ideas are welcomed, and employees feel comfortable and empowered to discuss diversity and inclusion.

At FactSet, this includes:

- Continuing to make our workplace a trusting place to have complex and sometimes difficult conversations about diversity and inclusion
- Implementing and expanding unconscious bias education
- Sharing best practices—and lessons learned—with other companies

CEO Action Fellowship



In addition to signing the CEO Action for Diversity and Inclusion Pledge, FactSet sponsored two employees to participate full-time in the CEO Action for Racial Equity Fellowship. The CEO Action for Racial Equity fellowship focuses on improving the lives of over 47 million Black Americans through advocacy and advancement of public policies to root out and end systemic racism. Our employees' contribution has allowed us to take an active part in advancing policy in the United States.

We are also going further to help strengthen and promote racial justice through economic opportunities. In June 2022, FactSet made a deposit into Optus Bank, a Black equity-focused financial institution. This is just one step toward creating real and tangible change in the communities in which we operate.



Tiesha Watson
Corporate Responsibility
Assistant Manager

As a participant in the CEO Action for Racial Equity fellowship, I was involved in the “Racism: A Public Health Crisis” policy solution team which aimed to influence legislation to improve social determinants of health and health outcomes, as well as encourage the federal government to proactively address structural racism through funding, designating, and directing government entities to manage health and racial equity initiatives and programs.



MLT (Management Leadership for Tomorrow) Certification

MLT FactSet furthers racial equity and inclusion efforts by being a member of Management Leadership for Tomorrow’s Black Equity at Work and Hispanic Equity at Work Certification Programs. As part of the MLT Certification process, FactSet has developed a detailed three-year plan for each certification, both of which have met approval for implementation by MLT. These plans will determine measurable goals under the following five pillars:

<p>1 Black Representation at Every Level</p>	<p>4 Racially Just Business Practices</p>
<p>2 Compensation Equity</p>	<p>5 Racial Justice Contributions and Investments</p>
<p>3 Inclusive, Anti-Racist Work Environment</p>	

HRC (Human Rights Campaign)

FactSet is a proud signatory to the HRC Business Statement on Anti-LGBTQ State Legislation, stating our clear opposition to harmful legislation to restrict the access of LGBTQ+ people in society. We are deeply concerned by the bills being introduced in state houses across the United States that single out LGBTQ+ individuals—many specifically targeting transgender youth—for exclusion or differential treatment. Laws that would affect access to medical care for transgender people, parental rights, social and family services, student sports, or access to public facilities such as restrooms unnecessarily and uncharitably single out already marginalized groups for additional disadvantage. They seek to put the authority of state government behind discrimination and promote mistreatment of a targeted LGBTQ+ population.

Launch of the Global Gender Inclusivity Policy and educational resources demonstrating FactSet’s protection and respect of the rights and identities of all employees

HRC - The Business Coalition for the Equality Act

FactSet is a proud member of the HRC Business Coalition for the Equality Act, supporting the federal legislation that would provide the same basic protections to LGBTQ+ people as are provided to other protected groups under federal law.

The Equality Act creates clear, consistent protections to prohibit discrimination on the basis of sexual orientation and gender identity in employment, ensuring that LGBTQ+ employees are hired, fired, and promoted based on their performance. In addition, the bill provides protections from discrimination of LGBTQ+ people in housing, credit, and jury service. The bill would also prohibit discrimination in public spaces and services, and federal funding on the basis of sex, sexual orientation, and gender identity.



Recognition



Women in Finance

Kisa Mwakasala, a Director of Sales in the UK, was selected as the 2022 European Women in Finance Winner

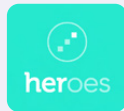
of the Rising Star Award for her exceptional leadership in business, dedication to DE&I as a founding Co-chair of the EMEA Multicultural BRG, and for her commitment to service.



Human Rights Campaign - Corporate Equality Index

Received 100% for 7th consecutive year in 2022 and was recognized

as a Best Place to Work for LGBTQ+ Equality on the HRC Corporate Equality Index.



Heroes Women Model

Our Chief Legal Officer and Global Head of Strategic Resources, Rachel Stern, and Helen Shan, our Chief Revenue Officer, were featured in the 2022 Heroes Women Model Lists supported by Yahoo Finance. They champion Senior Executives, Future Leaders, and Advocates for women in business, who are driving positive, long-term action across our organizations.



Fairy Godboss

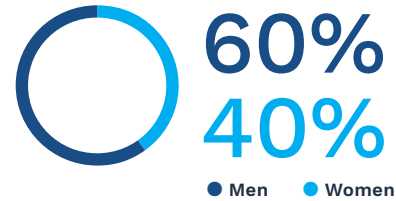
FactSet was recognized as one of the Best Companies for Women & Best Technology Company in 2022.



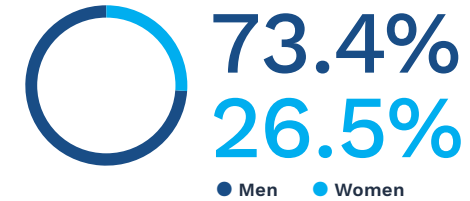
Workforce Representation

We are publishing our fiscal 2022 workforce demographics (including sharing our Federal EEO-1 data) to make a visible step in our commitment and our goal to identify and address disparities to help accelerate our aspirational goals. While we recognize the value of the EEO-1 reporting structure, we believe that the EEO-1 format is limited in terms of reporting diversity of backgrounds and geographic scope. To help overcome these limitations, we also measure our DE&I progress through additional qualitative and quantitative data points. In this report, we provide additional workforce demographic data to further increase the transparency of our disclosure and assist with measuring and accounting for our progress. We will continue to report on our progress annually to facilitate accountability.

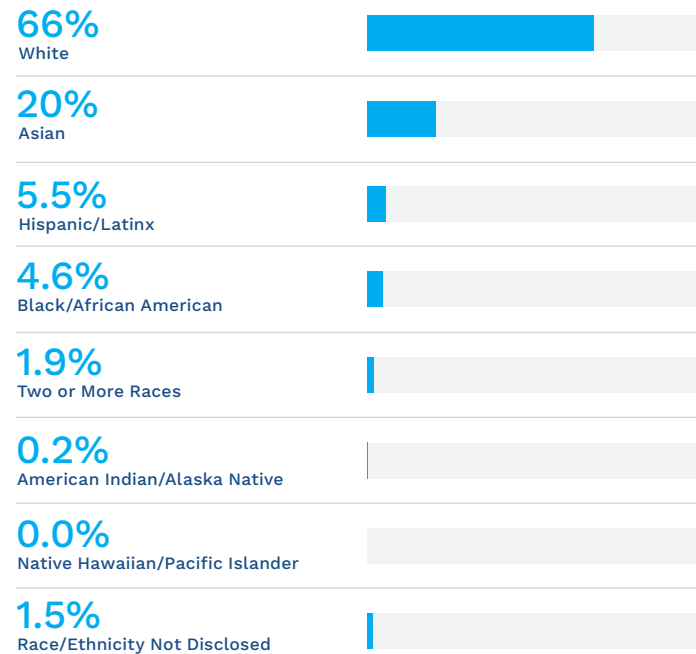
Global Gender Overall



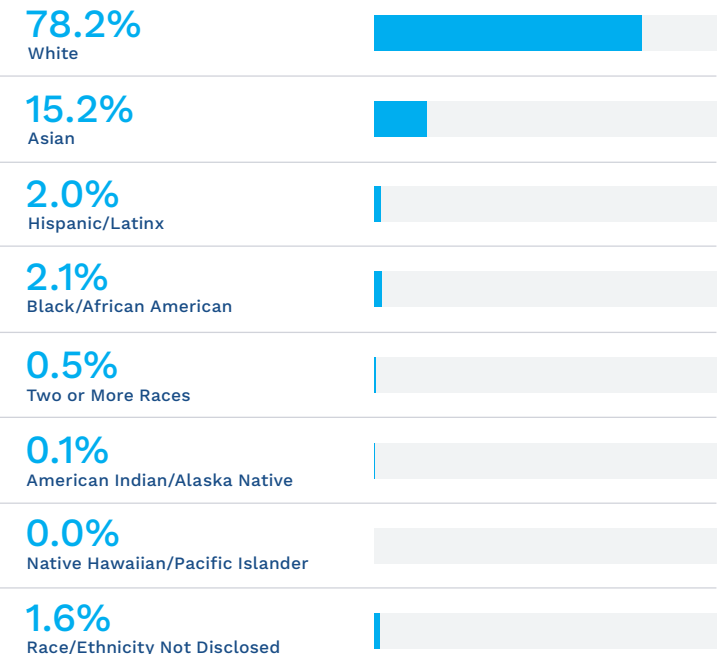
Global Gender Leadership



U.S. Race/Ethnicity Overall

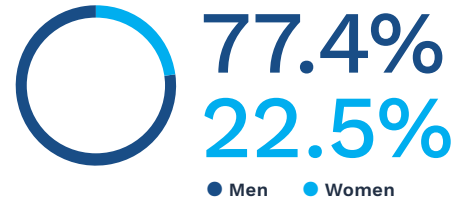


U.S. Race/Ethnicity Leadership

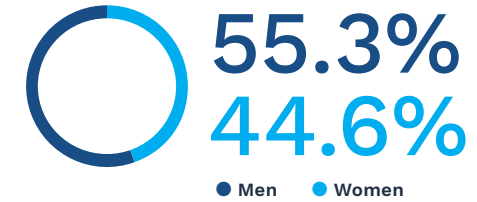




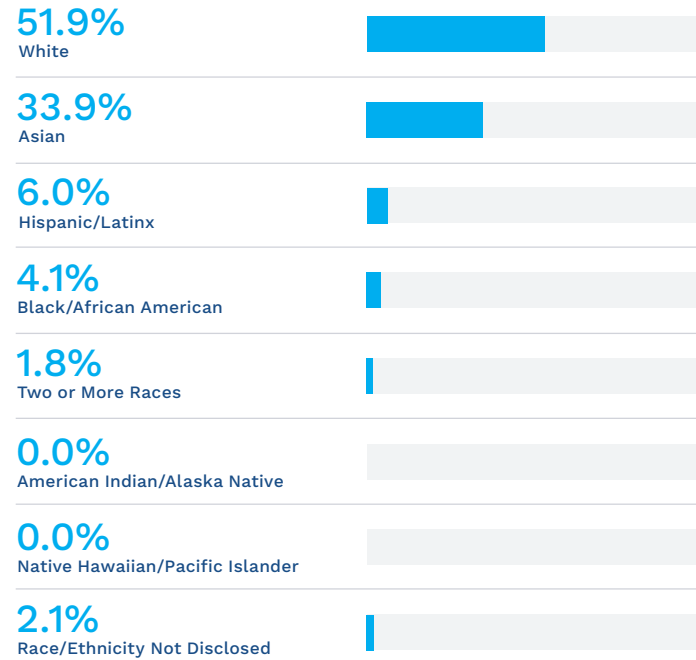
Global Gender Tech



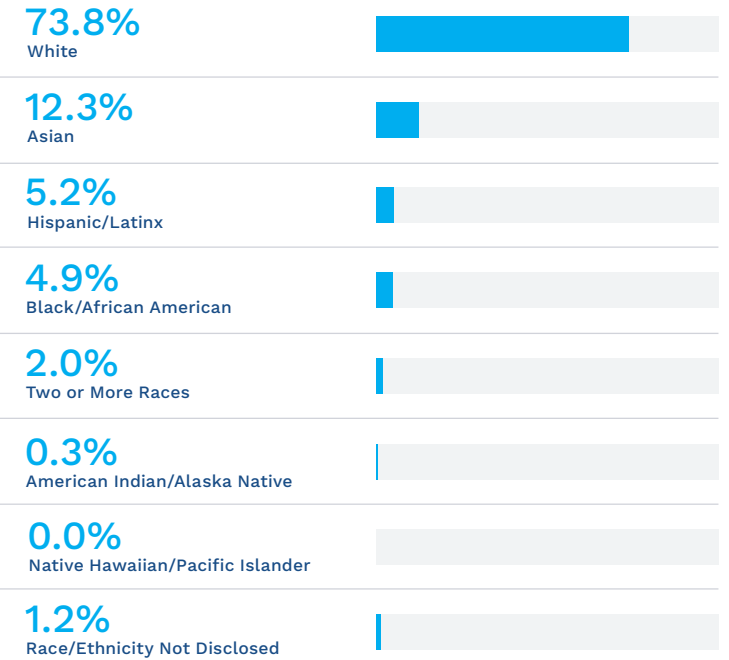
Global Gender Non-Tech



U.S. Race/Ethnicity Tech



U.S. Race/Ethnicity Non-Tech





Future Events and Initiatives

FactSet will continue to expand and deepen our DE&I journey through the introduction of new programs, including the expansion of our global self-id program, flagship sponsorship program, supplier diversity program, and additional educational resources while continuing to build DE&I accountability across the organization. We will continue to increase the recruitment, advancement, and engagement of talent at FactSet by fostering an inclusive culture that represents our global communities.

Employee Engagement and Wellbeing

Employee engagement and wellbeing are top priorities at FactSet as they impact recruiting, retention, productivity, and innovation. In conjunction with the Employment, Training, and Total Rewards subcommittee of our Sustainability Committee, FactSet fosters employee engagement through our BRGs, training programs, and wellness initiatives and captures feedback on these and other initiatives through an annual, anonymous, and confidential global employee engagement survey administered by a third party to capture our employees' constructive feedback. Aggregated survey results are reviewed by executive and senior leadership and direct managers to analyze and identify company-wide and individual operational unit focus areas and plans for improvement.

2022 Survey



8,000+

comments shared by employees in response to the survey



Response Rate Achieved

indicating that we heard from the vast majority of our employees across the globe



Increased Scores

from the previous year's survey in the areas of authenticity, work-life balance, and employees feeling satisfied with the recognition they receive for their work



High Scores

Our highest score was in the area of fair treatment. Employees feel that they are treated fairly at FactSet without regard to age, race, religion, gender, gender identity or expression, sexual orientation, disability, or ethnic characteristics

Benefits and Wellbeing

FactSet continues its dedication to supporting the physical, emotional, financial, and social wellbeing of our employees and their families. To support employees' wellness, FactSet's Global Employee Assistance Program (EAP), LifeWorks by Morneau Shepell, helps with almost any issue, whether related to health, family, money, work, or anything in between. Through our Global EAP, employees and their dependents have 24/7, 365 days-a-year access, at no additional cost, to services and assistance from LifeWorks. Through confidential counseling services with LifeWorks advisors, FactSetters are empowered to be productive and successful in all aspects of their lives.

In fiscal 2022, FactSet launched a new Wellbeing Program, WellTogether. WellTogether focuses on our four pillars of wellbeing, which are designed to provide employees with a foundation for creating and improving themselves physically, emotionally, socially, and financially. Using the tools within the pillars, employees can continue to flourish in all aspects of their lives while prioritizing their overall wellbeing. The Wellbeing team also launched a new wellbeing focused platform, available to all employees and their dependents. The platform is designed to connect our employees globally as they pursue their wellbeing goals, while providing a forum to deliver online resources and tools particular to their individual journeys.

FactSet recognizes families come in many forms and that every path to parenthood is unique. The journey to become a parent can also be physically, emotionally, and financially challenging. In the U.S., FactSet offers high-quality, affordable Family Building Benefits to provide its employees with support for some of life's most significant transitions: starting a family, navigating pregnancy, and balancing life as a working parent. Fertility benefits are available through Progyny, a leading fertility and family-building benefits solution that combines clinical and emotional guidance and support with the latest science and technology. Progyny's all-inclusive, comprehensive, and effective solution improves clinical outcomes and shortens time to pregnancy.

For further family-building support, FactSet offers its employees three mobile applications—Fertility, Pregnancy, and Parenting—through Ovia Health, a best-in-class digital maternity and family benefits solution. The applications provide access to expert content and tips, personalized health insights, data-driven support, on-demand health coaching with registered nurses, and stage-specific support. Recognizing the unique challenges associated with adoption and surrogacy, financial assistance, support, and guidance for adoption and surrogacy is also provided to all employees.

Expanded Resources

In fiscal 2022, FactSet expanded the Employee Total Rewards team, hiring a Global Head of Benefits and Wellbeing. Additional resources were hired to gain a more regional, local focus at FactSet locations in EMEA and APAC, with a heightened focus on employee benefits, wellbeing, and engagement. With an increased need and importance placed on health and wellbeing in the past few years, FactSet added a Wellbeing Specialist to the team to oversee the wellbeing programs and provide employees with a dedicated wellness resource.

In fiscal 2022, FactSet launched a new Wellbeing Program, WellTogether

Compensation

In fiscal 2022, FactSet, in conjunction with the Employment, Training and Total Rewards subcommittee of the Sustainability Committee, set out to increase pay transparency for all employees. Concurrent with the Global Pay Equity Review, salary ranges are becoming increasingly visible to employees with an emphasis placed on educating managers with this information so that they have constructive conversations around pay with their employees. eLearning modules were introduced to managers to increase their understanding of how salary ranges are decided and how to discuss the salary structure and individual salary opportunities with their employees.

In December 2022, FactSet launched a Glint Pulse Survey to assess perceptions of progress on compensation transparency. 66% of our global employees participated in the survey and we received over 1,100 comments. The survey results show notable improvement in employees' understanding of their compensation. Specifically:

- Employees feel that managers can now better explain how compensation decisions are made
- Managers feel that they gained the confidence to have effective discussions with their reports with the information provided to them

We are excited to continue this forward momentum by providing necessary information to employees and training for managers around compensation decision-making to set our fiscal 2023 pay transparency priorities.

How We Work

Since the onset of the COVID-19 pandemic, our highest priority concern has been the health and safety of our employees, families, and communities. We initially required the vast majority of our employees at our offices across the globe to work remotely and provided them with support to be able to ensure business continuity. We increased the frequency of all-company meetings led by our CEO and offered extensive benefit resources and mental health support. Employees were offered additional paid time off for COVID-19 illness and family care and to receive and recover from COVID-19 vaccinations.



We have since re-opened our offices and welcomed our employees back. Our offices did not re-open until local authorities permitted us to do so and our own criteria and conditions to ensure employees health and safety were satisfied.

In fiscal 2022, based on our success working in a remote environment during the COVID-19 pandemic, we rolled out our “How We Work” guide to flexible working arrangements under which employees in many of our locations, where permitted by local laws and regulations, and where the role permits, have the opportunity to choose between different work arrangements, including the ability to work in the office, remotely, or in a hybrid arrangement with the ability to split time between working remotely and in the office. Additionally, employees whose positions are not aligned to fixed working hours may elect to work a flextime schedule, working the same number of hours as is considered standard in their office location or employment contract, but during different times in the working day. We have found that these new standards support our employees in being their most productive selves at work and in their personal lives. These arrangements preserve the benefit of flexibility while retaining talent, fostering creativity, innovation, collaboration, and enabling mentorship, all key drivers behind employees' productivity, satisfaction, and success. Furthermore, these provisions support our commitment to creating a diverse, equitable, and inclusive workplace, removing barriers to augment our opportunity to attract and retain talent.

Employee Learning and Development

At FactSet, we are lifelong learners. We believe that learning and development empowers our employees, fosters outperformance with a growth mindset, demonstrates our commitment to our core values, and contributes to the success of FactSet's culture and business.

FactSet's growth mindset is an essential part of who we are and how we work, and it is reflected in the value we place in our greatest asset—our talented workforce. At FactSet, we believe that each employee has a unique connection to our vision and strategy, to the community of our company, and the communities in which we live. We cultivate these connections through key initiatives to empower FactSetters to grow their careers and help employees develop long-lasting relationships with colleagues and clients. We enable each employee to be their most productive self, both at work and in their personal lives, by promoting flexibility in how and where we work, secure in the knowledge that our best ideas come from anyone, anywhere, at any time. FactSetters work hard, work smart, work together, and make time for what's important in our lives, which includes giving back to our communities and the world at large. At FactSet, we uncover what's possible together, and we infuse our growth mindset into relationships with our clients and investors, driving them to see more, think bigger, and do their best work.

Learning & Development Team

FactSet's Learning & Development (L&D) team supports career advancement and provides input and oversight of FactSet's employee engagement efforts. The L&D team works with "Learning Business Partners" (LBPs) to align learning and development needs with overall business goals. LBPs are HR professionals and senior leaders within the L&D team who define and address knowledge gaps, positioning FactSet to ensure that, across disciplines, FactSetters are subject matter experts who can adapt quickly to changing environments and new technologies. LBP efforts contribute to learning hours that support our key workforce initiatives, including new hire training and ongoing leadership development programming, empowering our employees with skills to succeed in the future.

Extensive training and development opportunities are also available to support employees in their pursuit of lifelong learning, including certification reimbursement for eligible expenses related to the CFA (additional paid vacation is also offered for CFA), CPIM, CAIA, and FRM exams.

Through annual performance reviews and quarterly check-ins, we ensure that learning and development goals remain current, accurate, and reasonable so that all FactSet employees continue to demonstrate and grow their expertise.

During fiscal 2022, the L&D team significantly increased employee learning opportunities in a variety of areas. We expanded our learning partnerships and targeted programs, and we created hundreds of in-house eLearning courses to help our employees learn about our business, industry, clients, and products. For example, we built multiple skill training paths within our eLearning system to ensure our engineers have access to the best online learning resources on cutting-edge technologies.

We also released career development resources that provide employees with access to tools such as career progression plans, curated skill taxonomies, and relevant eLearning courses. Through annual performance reviews and quarterly check-ins, we ensure that learning and development goals remain current, accurate, and reasonable so that all FactSet employees continue to demonstrate and grow their expertise.

As part of the continued growth of our sustainability programming, the L&D team created an internal site for sustainability and ESG education. The site is supported by LinkedIn Learning and other external resources to provide educational material on sustainability topics, FactSet's commitments, and how employees can support our sustainability goals.


Highlights & Metrics

Training Type	Hours (FY22)	% YoY	Hours (FY21)	% YoY	Hours (FY20)
Continuing Education – Live Training	41,926	-35%	64,732	91%	33,957
Continuing Education – Digital Learning	109,978	14%	96,499	374%	19,938
Campus Onboarding Programs	134,362	2%	131,914	-19%	163,327
Total	286,266	-2%	293,146	34%	217,222


Learning Hours	Hours (FY22)	Hours (FY21)	Hours (FY20)
Total Learning Hours	286,266	293,146	217,222
*Avg. Training Hours Per Employee	21	23	20

* An average FTE count throughout the reporting period was used to calculate training hours per employee.

Highlights



Sustainability Learning Site
established for employees



Learning Programs
reinstated in person



Management learning programs
expanded



Conferences and Training Programs

During fiscal 2022, we reinstated in-person learning programs. We hosted our campus onboarding programs for Sales and Engineering staff in three global locations: Manila, London, and Norwalk. 234 new hires attended the in-person onboarding programs totaling 134,362 hours of learning. We also invited all campus hires who joined FactSet since March 2020 back to our regional headquarters for two-day summits focused on network building and FactSet's core values.

To ensure our employees continue to feel supported by their managers, we expanded our management learning programs to empower managers to proactively have career and development conversations with their teams, establish a coaching rhythm, and strengthen the employee-manager partnership.

Be the Advantage Summits

FactSet's two-day, in-person, "Be the Advantage" summits connected new consultants, engineers and product management new hires, with the objective of fostering FactSet's collaborative, team-oriented culture and demonstrating FactSet's investment in the attendees' future. The Summits began at the end of fiscal 2022 and are ongoing in fiscal 2023. In fiscal 2022, 219 people attended the Summits and logged 4,220 hours of learning. The attendees included all campus hires who joined FactSet since March 2020. During the summits, our attendees participated in activities to develop their in-person communication skills and deepen their understanding of our business and strategy.

Learn for a Cause

Learn for a Cause, part of FactSet's annual Hunger Awareness Campaign, encourages FactSet employees to use our learning platforms such as Workday, LinkedIn Learning, and Pluralsight. Every hour of learning employees completed during the Hunger Awareness Campaign equated to four meals donated to the UN World Food Program's School Feeding Program. Over 5,000 FactSetters learned for nearly 9,000 hours, resulting in a donation of 35,980 meals.

Hackathon

This year, we celebrated our 10th anniversary of FactSet's most innovative tradition—the Hackathon. The Hackathon is a 24-hour event hosted by the L&D team in FactSet offices around the world. Participants spend this time working in teams to develop solutions to self-identified problems. They submit videos of their projects, and all employees are eligible to vote for the projects that are "Best in Show" and "Most Innovative." Additionally, FactSet assembles a diverse panel of senior leaders from across the company to select two "Business Impact" awards for the projects that offer the most potential value to FactSet's business. The Hackathon creates a welcoming environment for experimentation, innovation, learning, teamwork, and network building. This year, almost 600 employees participated in the Hackathon, resulting in 11,964 hours of learning.





Client Obsession Campaign

The products, solutions, and workflows we build are all centered around our clients, so at the beginning of fiscal 2022, our Executive Leadership Team encouraged all FactSet employees to become “Client Obsessed.” The L&D team supported this by centering an educational series around our clients and five key firm types: asset owners, institutional asset management, wealth management, banking, and corporates. The campaign lasted 12 months and included eLearning, live, talk-show style discussions, and curated internal resource sites on these five firm types, resulting in 1,600 hours of learning. The goal was to increase all employees’ familiarity with the various firm types, whether the employees worked directly with our clients for years or were newer to the industry.

Our “Client Obsessed” initiative lasted 12 months and included eLearning, live, talk-show style discussions, and curated internal resource sites resulting in 1,600 hours of learning

Future Events and Initiatives

For fiscal 2023, the L&D team has introduced “SMARTER goals” (Specific, Measurable, Achievable, Relevant, Time bound, and Evaluated and Revised) for FactSet employees. These goals build off existing SMART goals and add the E and the R to provide the benefits of quarterly goal check-ins. The L&D team has also made employee goals more standardized, with clearer pathways for achievement and increased clarity on how individual goals tie to the overall organization’s goals. We look forward to continuing our development of learning and career resources in fiscal 2023.

Additionally, at the beginning of fiscal 2023, the L&D team kicked off a new leadership development program, FactSet Leadership Advantage Academy. Just over 100 employees globally were selected to participate in the 12-month program. The program was created to ensure FactSet’s ongoing success with a strong bench of committed, knowledgeable successors to Senior Leaders. The program content was created to help leaders refine a multi-perspective understanding of our core stakeholders, make decisions through the lens of diversity and inclusion, develop the foresight to effectively lead an evolving workforce and future generations of workers, and practice a sincere leadership style to build trust and loyalty with stakeholders.

Community and Volunteerism

Our commitment to corporate citizenship is built into all aspects of our business. FactSet continues to invest in local communities through our Corporate Responsibility program, uniting around our four Pillars of Service: Inspire Tomorrow's Engineers, Educate to Elevate, Protect Our Environment, and Alleviate Food Insecurity. In each of our global offices, one thing is clear: FactSetters worldwide have a passion for making an impact on our business and in our communities. We recognize our responsibility as a global corporate citizen to invest in the communities where we work, and our Corporate Responsibility program directs our employee volunteer efforts for positive social impact. We have Corporate Responsibility Committees working globally in 30 locations. In fiscal 2022, our employees donated their time and talent, serving community needs in partnership with 75 charity partners around the world.



Laura Ruhe
Senior Vice President,
Corporate Responsibility

Fiscal 2022 was an impactful year for FactSet's commitment to corporate citizenship. Our employees were able to return to in-person volunteering after the pandemic restrictions.

Their energy, passion, and tenacity to help the local communities was truly inspiring. In addition to planting trees and working at food banks, we gave time and talent to mentoring students, supporting technology education, and assisting young people along their education and career pathways. Establishing the FactSet Charitable Foundation illustrates FactSet's continued investment in our communities.



Pillars of Service



Inspire Tomorrow's Engineers

This pillar aims to give young people from a variety of diverse backgrounds the skills and experience needed to become future science and technology leaders. FactSet employees volunteer with education and social mobility nonprofits and charitable organizations to help young people build engineering skills and enter the technology industry.



Educate to Elevate

FactSet employees volunteer with organizations in line with our second pillar of service, Educate to Elevate, to help prepare young people for future careers, including but not limited to those related to science and technology. Collaboration provides an avenue for FactSet employees to share their wisdom with youths across the globe on applying for, preparing for, and succeeding in a career.



Protect Our Environment

In fiscal 2022, FactSet hosted a variety of awareness talks, volunteer events, and sustainability challenges as part of Earth Day recognition, where employees learned how to change habits and make choices that have less harmful effects on the environment to build a more sustainable future together.



Alleviate Food Insecurity

The final FactSet pillar of service is Alleviate Food Insecurity. Each November, FactSet unites to fight hunger in local and global communities.

FactSet Charitable Foundation

In fiscal 2022, we established the FactSet Charitable Foundation (Foundation). The Foundation is a non-profit, non-stock corporation and is a separate legal entity from FactSet. The Foundation aims to improve communities in which FactSetters live and work. The Foundation's primary focus is providing financial support and expertise to non-profit organizations implementing innovative programs that empower underserved students to experience greater educational support and enrichment, to think bigger, and to do their best work. The goal is to support programs that create pathways to and through college and on to technology careers.

Grants are made by invitation only. The Foundation will focus on programs benefiting the community near FactSet's headquarters location and other major FactSet locations. All of the Foundation's grants are made on the provision that the recipient charity does not discriminate by race, creed, gender, gender identity, sexual orientation, age, religion, or national origin.

Governance

- Highlights
- Data Privacy
- Data Security
- Business Ethics
- ESG Investing Solutions



Highlights



Updated Code of Business Conduct and Ethics

Zero

material security incidents in fiscal 2022

98%

of employees completed training on the Code of Business Conduct and Ethics



45K

hours of employee security-related training



Updated Enterprise Risk Management (ERM) Policy

Data Privacy

FactSet respects the data privacy and protection rights of our employees, clients, and business partners, and we hold ourselves to the highest standards when protecting personal, confidential, and proprietary data and other sensitive information. We have a data privacy program, which is reviewed and updated regularly to ensure alignment with the evolving legal landscape.

We conduct annual enterprise risk assessments to identify, assess, and prioritize our top risks, including data privacy and protection risks. We assign owners to each top risk and those owners, together with operational designees, are responsible for regular and ongoing assessment of their risk area, the development and execution of plans to mitigate and manage those risks, and reporting on those risks to our executive leadership team and the Board of Directors.

All FactSet employees are required to comply with the [Code of Business Conduct and Ethics](#), which includes a section on Data Privacy and Information Security and a link to FactSet's internal data protection policy. As part of Ethics Awareness Month, FactSet rolled out the updated Code to all employees globally and promoted it along with various initiatives during the month, including optional data privacy training. Over 98% of employees (excluding new hires and employees on leave of absence) completed mandatory training on the Code of Business Conduct and Ethics in fiscal 2022 and signed an annual acknowledgment of the Code, certifying their commitment to comply with the policies outlined therein.

Recent achievements of our data privacy program include an updated [Privacy Policy](#) and an update to the Intragroup Data Transfer Agreement, implementing requirements from the European Court of Justice for the use of website cookies. In addition, we hired a new attorney dedicated to privacy and data protection. We also continue to update our Data Processing Agreements with both our vendors and clients to ensure we are staying current with new regulatory requirements and best practices.

Future Events and Initiatives

For fiscal 2023 and beyond, FactSet plans to continue to review and mature existing data governance, data protection, and information security processes. We will continue to provide Data Protection Training for all employees globally.



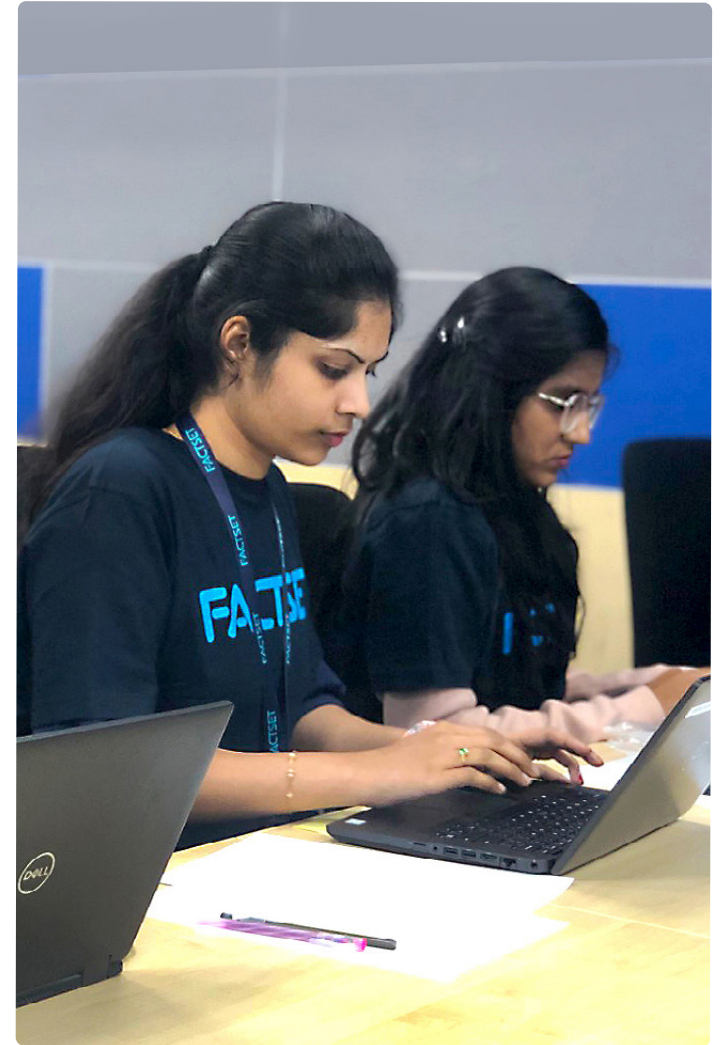
Data Security

Keeping data secure for our clients is a top priority at FactSet. Programs or policies that can be implemented to improve the security of our data are among the most material topics for FactSet and our stakeholders. FactSet has developed a comprehensive global information security and governance framework aligned with industry best practices. This framework and its underlying controls are designed to ensure that FactSet client data is kept secure, only accessed by authorized FactSet employees with a justified business need, that such data is not disclosed or modified without client authorization, and that applicable legal and regulatory requirements are met. Information Security training is provided to all FactSet employees to facilitate ongoing education and awareness. All suspected security incidents and potential weaknesses are reported to, investigated, documented, and resolved by our internal security team.

FactSet's information security and governance framework is aligned with ISO 27002 and SOC2 Trust Service Criteria. FactSet implemented the [National Institute of Standards and Technology \(NIST\) Cybersecurity Framework](#) in combination with ISACA Capability Maturity Model Integration (CMMI) for both capability measurement and further granularity and control prioritization.

In fiscal 2022, the data security team rolled out a Cyber Crisis Management Plan and training. Cyber crisis table-top simulation exercises were conducted from May through September 2022 and resulted in action planning to determine appropriate additional training and controls.

If employees suspect a cybersecurity incident, a breach of FactSet's information system, or unauthorized exposure of personal information, they are required to report it immediately by filing a report or contacting their direct manager or a member of the information security team. In addition, we maintain insurance coverage that is intended to address certain aspects of cybersecurity and data protection risks.



Data Security Functional Pillars and Responsibilities

FactSet retains various teams responsible for data security testing, modeling, monitoring, and mitigating cyber threats:

Product and Application Security

This team performs implementation security reviews, penetration testing, application threat modeling, and manages the implementation of security controls in FactSet's Continuous Integration/Continuous Development pipeline. This team is also responsible for defining, measuring, and representing our first-party vulnerability posture at FactSet and driving the appropriate remediation.

Vulnerability Management

This team is responsible for performing internal system and third-party vulnerability assessments on an ongoing basis. FactSet also has external vulnerability assessments and penetration tests performed by a third party on a regular basis. The risk ratings of findings are classified using a combination of Common Vulnerability Scoring System scores and other internal business metrics. Findings are remediated commensurate with the respective risk rating. FactSet's Risk Management Policy includes severity-based escalation requirements to ensure proper management-level visibility and evaluation of risk issue items, regardless of the source of that risk.

Governance, Risk, and Compliance

This team sets the rules and baselines from a security perspective for the company to adhere to. They also identify and manage risks to prioritize the security program.

Security Intelligence Center & Incident Response

This team is the frontline in detecting, responding to, and mitigating cyber threats.

Security Engineering and Operations

This team is responsible for deploying security controls to monitor and protect FactSet (e.g., firewalls, antivirus, threat detection).

Identify and Access Management (IAM)

This team focuses on managing the identity of employees, contractors, and third parties, ensuring a least privilege access model to systems and data from hire through termination.

Strategic Planning and Security Architecture

This team defines strategy and direction aligned with business objectives.

Information Security Risk Committee (ISRC)

The ISRC is comprised of a diverse group of executives, including the Chief Information Security Officer and various other senior IT executives. The ISRC and the Enterprise Risk Management (ERM) team meet regularly and report periodically to the Executive Leadership Team and the Board of Directors. FactSet conducts annual risk assessments and assigns owners to each top risk who are responsible for mitigating and managing their risks and reporting on them to the ERM team.

DATA SECURITY

Metric	FY22
Number of material Data Breaches	None
Percentage of material data breaches involving customers' confidential business information (CBI) or personally identifiable information (PII)	None
Total hours of security-related training	45,211

Future Events and Initiatives

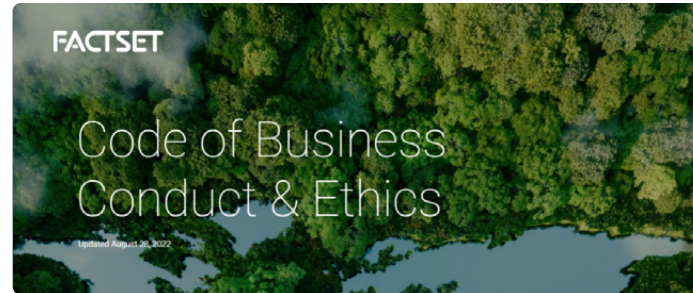
FactSet reviews and updates our data privacy and data protection policies on a regular basis. We plan to roll out comprehensive data privacy training to all employees in fiscal 2023.

Business Ethics

FactSet's ongoing commitment to integrity is at the forefront of all our business operations. All FactSet employees are expected to adhere to the highest standards of business ethics and to act with integrity in their daily work activities. Accordingly, we continue to advance education and awareness in this area to align with industry best practices and ensure that FactSet's business operations comply with applicable laws and regulations.

FactSet's Code of Business Conduct and Ethics (Code) was substantially revised and updated in fiscal 2022 to provide a more detailed explanation of the company's business ethics, commitments and policies, while also making the Code more visually appealing and easier to understand for employees and other stakeholders. The Code applies to all FactSet directors, officers, and employees, as well as contractors and temporary workers while on assignment at FactSet. The updated Code has been translated and made available to employees in seven languages.

All FactSet employees are provided with training to ensure their understanding of the Code and are required to sign an annual personal commitment statement affirming their agreement to comply with its terms and report possible violations of the Code. FactSet leaders and employees are responsible for escalating all Code violations through appropriate channels, including to FactSet's Chief Legal Officer, Chief Compliance Officer or a member of the Legal or Human Resources Departments.



The Code fosters a culture of compliance with the law and provides guidance on how to conduct business ethically and with integrity. The Code and our related policies outline FactSet's expectations and commitments in several areas, including:

Human Rights

We are committed to protecting human rights and the principles expressed in the UN International Bill of Human Rights, the UN Global Compact, and the International Labor Organization's Declaration on Fundamental Principles and Rights of Work. In recognition of the inherent dignity of all persons, FactSet abides by the principle of non-discrimination in all aspects of employment. We foster an inclusive culture that respects and appreciates our employees' differing beliefs, religions, ethnicities, life experiences, and cultural backgrounds. We prohibit all forms of forced or child labor in our organization and our global supply chain.

Anti-Corruption

FactSet prohibits bribery and corruption of any kind. We recognize that bribery can come in the form of improper cash payments, kickbacks, or gifts directly or indirectly offered to or received from a private client, government official, supplier, or another third party. Facilitation payments to expedite routine administration actions are also prohibited. We maintain accurate books, records, and accounts that correctly reflect the true nature of all transactions and engage only reputable third parties who share our commitment to accuracy, transparency, and ethical business practices. In addition to our Code, we also maintain an Anti-Bribery and Corruption Policy that applies to all employees worldwide. Under our Supply Chain Code of Conduct, we also expect our global suppliers and their respective supply chains to uphold similar standards of ethical conduct.

Money Laundering

FactSet does not support, facilitate, or condone money laundering, tax evasion, or doing business with individuals, governments, or entities involved in illegal trade or subject to applicable sanctions. We comply with policies and procedures designed to prevent FactSet from: (1) receiving the proceeds of crime; (2) aiding or abetting third-party attempts to evade taxes, currency controls, or other regulations; and (3) violating trade sanctions or international embargoes.

Conflicts of Interest

We act in the best interest of FactSet and avoid influences, interests, associations, or activities that might interfere with our work or objective decision-making. We use FactSet assets and resources to support our business needs and those of our clients.

Equal Opportunity and Fair Treatment

At FactSet, we know that our employees are the foundation of our success. We are committed to building an equitable and inclusive work environment where individuals of all backgrounds are respected, recognized, and rewarded for the diverse talents they bring to FactSet. Hostility, bullying, offensive conduct, illegal discrimination, and harassment will not be tolerated. Individuals who engage in such behaviors are subject to disciplinary action up to and including termination of employment.

Gifts and Entertainment

The Code sets forth guidelines for giving and receiving business gifts, meals, services, and entertainment. Business gifts and entertainment are designed to build goodwill and sound working relationships among business partners. Employees may not accept gifts or entertainment offered with the intent to influence their judgment or affect their ability to perform their duties on behalf of FactSet.

Political Activities

We support the right and responsibility of all individuals to participate in the political process. FactSetters are encouraged to be politically active as individual citizens and support the political candidates of their choice—on their own time and at their own expense. Employees should avoid conflicts of interest and comply with all relevant campaign finance laws. Employees may not donate FactSet funds, facilities, or other resources for the benefit of a political candidate, party, or campaign unless authorized to do so by FactSet's Chief Legal Officer.

It is FactSet's practice to not use corporate resources (including monetary and in-kind services) to make direct political contributions, including contributions to candidates, political parties or political action committees or in support of or opposition to ballot initiatives, and we made no such contributions during fiscal 2022.

Raising Concerns

Several resources are made available to employees when they have a policy question or compliance concern. FactSet maintains an Ethics Action Hotline, available 24 hours a day, seven days a week, with the option to report anonymously at [FactSetEthicsActionLine.com](https://www.factset.com/ethics) or by calling +1-800-461-9330. All reported issues are carefully reviewed and addressed or assigned to a neutral investigator for a

more in-depth analysis, if appropriate. If an allegation is confirmed, appropriate disciplinary or correction action will be taken regardless of seniority or position of the individuals involved. FactSet's Whistleblower and Anti-Retaliation Policy encourages employees to raise concerns without fear of reprisals. An employee may not be discharged, demoted, suspended, threatened, harassed, intimidated, coerced, or retaliated against in another manner because they asked a question or reported a concern in good faith.



Ethics Awareness Month

In November 2022, FactSet introduced Ethics Awareness Month, a global campaign to launch FactSet's updated Code and raise awareness of potential ethical issues and how to handle them. Each week of November highlighted a unique area of the Code and included global communications, training sessions, and other activities. Micro-learning courses were offered on speaking up, respectful communication, data privacy, and preventing insider trading. Employees participated in a "Ethics Bee" that tested their knowledge of the new Code and an Ethics Awareness Raffle that offered prizes to encourage employee participation and engagement. FactSet also launched an Ethics & Compliance website, an online resource for employees to get direct access to the Code, corporate policies, compliance trainings, and regular updates regarding ethics and compliance initiatives.

Enterprise Risk Management (ERM)

The ERM program is designed to identify, prioritize, and assess the top risks and uncertainties that could impact FactSet's strategic objectives. ERM activities include conducting enterprise risk assessments to better understand risk exposures and management capabilities overseeing the development of risk mitigation plans, and monitoring and reporting on top risks to the Executive Leadership Team and the Board of Directors. An updated ERM policy was adopted in fiscal 2022 with enhanced risk management processes and reporting planned for fiscal 2023.

Future Events and Initiatives

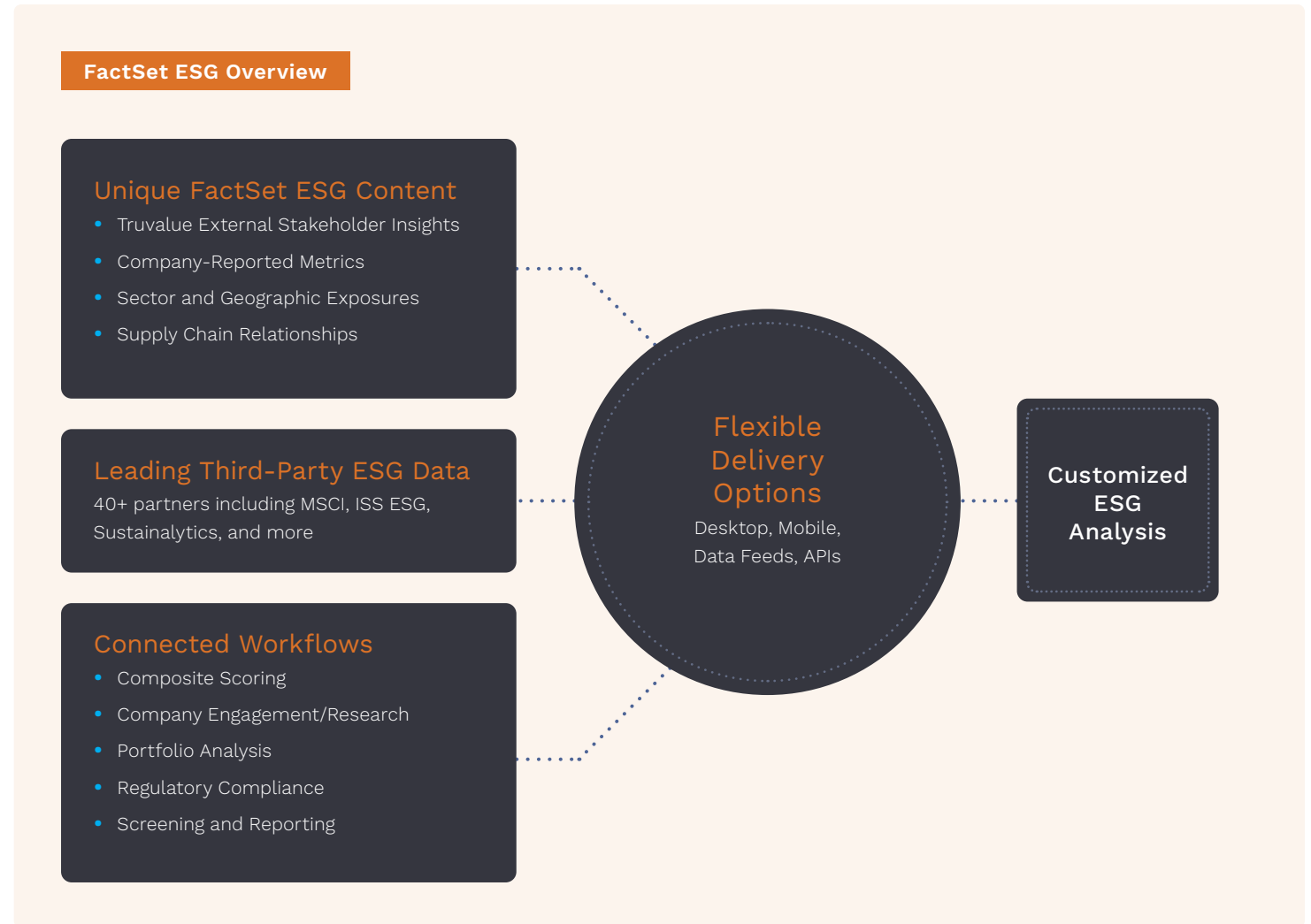
As part of our ongoing commitment to business ethics, FactSet launched the "Stand Together" campaign in fiscal 2023, a global program that includes training, communications, and other resources designed to help FactSet employees identify, disrupt, and respond to potentially bullying, harassing, or discriminatory behaviors in the workplace. Additionally, FactSet plans to roll out training to all employees in fiscal 2023 covering compliance with our Conflicts of Interest, Data Privacy, and Anti-Corruption policies and procedures.

RISK MANAGEMENT METRICS

Metric	FY22
Total number and percentage of operations assessed for risks related to corruption	FactSet conducts regular risk assessments with enterprise-wide scope as part of its ERM and internal audit activities. These risk assessments cover multiple areas of potential risk, including risk of bribery and corruption
Number of employees trained on anticorruption	In fiscal 2022, 98% of employees completed training on our Code of Business Conduct and Ethics, which included a section on anti-corruption
Confirmed incidents of corruption and actions taken	There have been no confirmed incidents of corruption during the reporting period

ESG Investing Solutions

FactSet's [ESG investing solutions](#) give our clients the ability to understand the ESG characteristics of their investments as part of our mission to solve our clients' greatest challenges with the tools they need to make their investment decisions. FactSet's ESG solutions aim to bring transparency to the ESG data space so that our clients can make more well-informed sustainable investment decisions. FactSet combines leading data, research, analytics, and reporting tools that allow clients to integrate ESG into all phases of their portfolio lifecycle. FactSet offers third-party ESG content and produces differentiated ESG data and analytics through the Truvalue product suite. Truvalue tracks how companies are performing on ESG issues according to external stakeholders as sourced from news, trade journals, watchdog groups, and more. This timely data helps eliminate "blind spots" found in data sets based on company disclosed information. In addition, FactSet collects raw metrics from company reports to support holistic analysis of ESG performance.



FactSet's ESG solutions span the following workflows:

ESG research

FactSet's research capabilities allow financial institutions to integrate scores, news, and events from multiple sources to establish a well-rounded view of corporate ESG performance, risks, opportunities, and behaviors.

- View scores from third-party vendors like Sustainalytics, MSCI, ISS ESG, and more alongside internal ESG scores
- Obtain full transparency with underlying metrics, including carbon emissions, green bond issuances, relevant proxy proposals, and board diversity
- Avoid blind spots and uncover the topics driving public or private company ESG behavior through FactSet's award-winning Truvalue Platform
- Obtain market intelligence and context on company news and macro sustainability themes through FactSet's StreetAccount ESG content and summaries

Custom ESG scoring

FactSet enables the combination of ESG scores and metrics from various providers to elevate the approach to sustainable investing.

- Create proprietary ESG scores using metrics from numerous vendors, a customized weighting methodology, and flexible data management tools
- Aggregate custom scores across a portfolio and a defined universe to support portfolio construction and analysis
- Automate, store, and distribute proprietary ESG scores through FactSet or open distribution options, including APIs, flat files, and interactive dashboards

Quant strategies

Clients are able to enhance quantitative strategies with timely, objective measures of ESG performance that are uncorrelated and additive to traditional factors.

- Capture investor ESG sentiment and attention through the Truvalue Activity Signal to measure downside risk and identify upside opportunities
- Meet the expectations of an ever-changing market with a comprehensive library of ESG metrics
- Access increased ESG precision, real-time analytics, and composite scoring across holdings and portfolios

Stewardship & engagement

FactSet's solutions provide the ability to manage stewardship initiatives and corporate engagement using robust research management solutions and track records of proxy voting and results.

- Track corporate communication and incorporate internal ratings, ESG, and financial data into a custom [research management solution](#)
- Identify emerging ESG issues and topics for engagement with Truvalue's Dynamic Materiality calculation
- Assess proposal trends aligned with ESG themes and [predict](#) how funds and investment institutions will vote on proxies at public company meetings

Idea generation & portfolio construction

Clients can efficiently construct portfolios and identify securities across asset classes that meet their ESG criteria.

- Screen for green bonds that align with desired impacts and financial profiles
- Evaluate thematic ETFs and mutual funds across their ESG and financial performance
- Isolate companies with revenue exposure to relevant ESG sectors and industries or geographies

Portfolio Analysis & Reporting

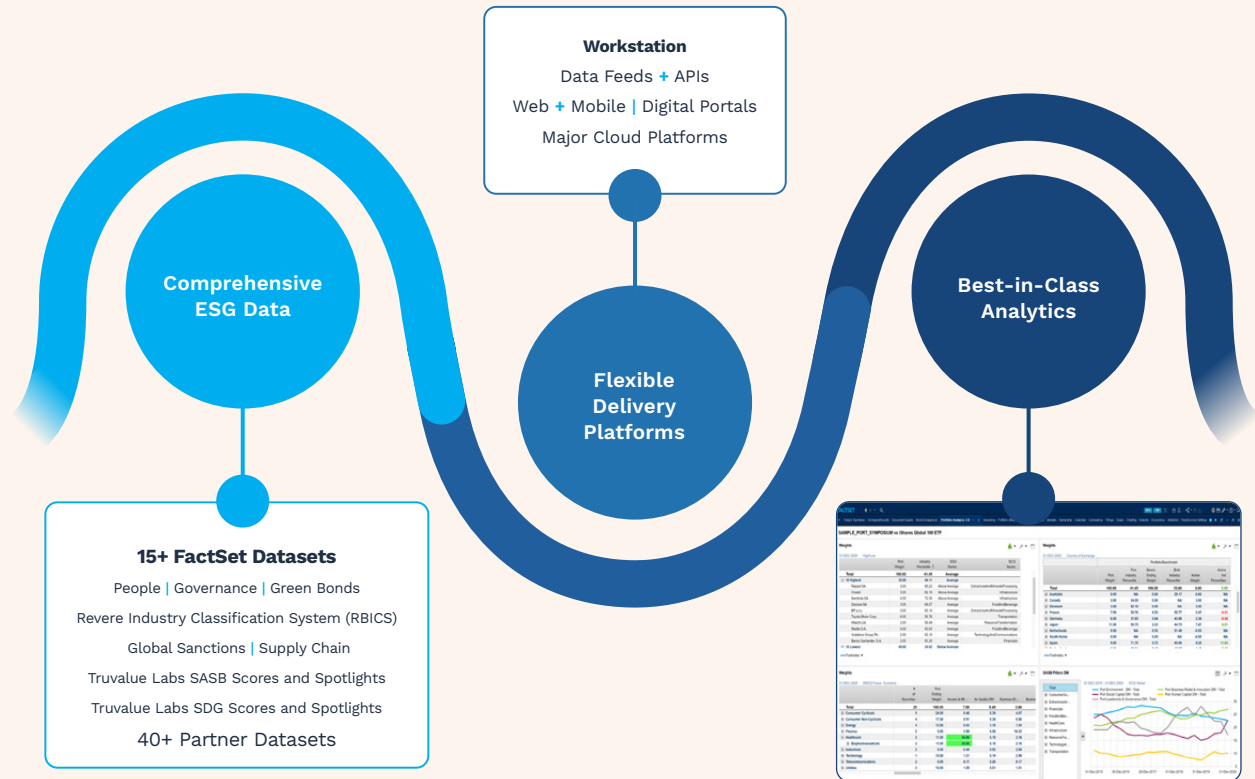
FactSet enables financial institutions to seamlessly integrate ESG into portfolio analysis, monitoring, risk management, reporting, and all other phases of the portfolio lifecycle.

- Generate bespoke reports to measure ESG exposures, performance, and attribution across asset classes
- Leverage trusted expertise and easy integration for compelling reporting
- Build client-ready portfolio reports with ready-to-use ESG templates

FactSet also enables clients to simplify compliance with new and evolving ESG regulations using unique ESG data, powerful portfolio analytics, and efficient reporting tools.

- Streamline and scale reporting with FactSet’s content-agnostic solutions for SFDR regulatory requirements
- Choose from the datasets already integrated into FactSet or load custom data
- Aggregate indicators across holdings for simplified SFDR reporting
- Leverage FactSet’s regulatory templates to expedite report creation
- Use customized logic to incorporate data from multiple sources, without sacrificing auditability and transparency

FactSet ESG Solutions





Future Initiatives

ESG regulation has been evolving rapidly and shifting ESG reporting from a voluntary exercise to a mandatory obligation. The EU Sustainable Finance Disclosure Regulation (SFDR) has introduced detailed rules for how financial market participants need to disclose sustainability. To stay ahead of the curve, our ESG products and solutions will continue to expand to meet these needs, allowing our clients to simplify their compliance with these new and developing regulations. Our ESG regulatory solutions center around content-agnostic scalable and customizable reporting workflows. FactSet strives to support our client's evolving ESG data needs by offering FactSet's proprietary data and third-party ESG vendors, seamlessly linked to best-in-class portfolio analytics.

In parallel and as a result of regulatory requirements, the demand for as-reported ESG metrics collected from corporate disclosures continues to rise. In response, FactSet is working to expand its collection of company-reported ESG metrics, with the goal of bringing a high level of auditability to our forthcoming ESG Fundamentals data.

GRI Index

GRI Standard	Disclosure	Response/Location
General Disclosures		
GRI 2: General Disclosures 2021	2-1 Organizational details	<p>Legal name: FactSet Research Systems Inc.</p> <p>Nature of ownership: Publicly traded</p> <p>Headquarters location: Norwalk, Connecticut</p> <p>Countries of operation: As of August 31, 2022, we had 39 offices across 20 countries with 11,203 employees</p>
	2-2 Entities included in the organization's sustainability reporting	FactSet and all its subsidiaries
	2-3 Reporting period, frequency and contact point	<p>Sustainability reporting period: September 1, 2021 – August 31, 2022</p> <p>The financial reporting period aligns with the sustainability reporting period.</p> <p>Frequency of sustainability reporting: Annual</p> <p>Report Publication Date: March 2023</p> <p>Contact point for any questions: sustainability@factset.com</p>
	2-4 Restatements of information	In fiscal 2021, FactSet reported an average of 26 hours per employee in GRI404-1, using total FTE at the end of the reporting period. In fiscal 2022, FactSet recalculated GRI404-1 to use an average FTE count throughout the reporting period. The average training hours per employee in fiscal 2021 should be restated to 23 hours.
	2-5 External assurance	We are currently conducting our 2022 Scope 1 and Scope 2 emissions validation. This will be available on our website once completed.

GRI Standard	Disclosure	Response/Location															
GRI 2: General Disclosures 2021	2-6 Activities, value chain and other business relationships	Active in the Professional and Commercial Services sector, FactSet creates flexible, open data and software solutions for approximately 180,000 investment professionals around the world, providing anytime, anywhere access to financial data and analytics that investors use to make crucial decisions.															
	2-7 Employees	<table border="1"> <thead> <tr> <th>Region</th> <th># Employees</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Americas</td> <td>2,400</td> <td>21%</td> </tr> <tr> <td>Asia Pacific</td> <td>7,401</td> <td>66%</td> </tr> <tr> <td>EMEA</td> <td>1,402</td> <td>13%</td> </tr> <tr> <td>Total</td> <td>11,203</td> <td>100%</td> </tr> </tbody> </table>	Region	# Employees	Percentage	Americas	2,400	21%	Asia Pacific	7,401	66%	EMEA	1,402	13%	Total	11,203	100%
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Total	11,203	100%															
2-8 Workers who are not employees	<p>The below numbers represent the headcount at the end of fiscal 2022. For workers who are not employees, the emphasis is on seasonal supplemental work in corporate groups, but the bulk of the contingent workers are for project-based work in product and technical groups. These numbers remain fairly stable on a rotating basis throughout the reporting period.</p> <table border="1"> <thead> <tr> <th>Region</th> <th># Workers who are not employees</th> </tr> </thead> <tbody> <tr> <td>Americas</td> <td>185</td> </tr> <tr> <td>Asia Pacific</td> <td>13</td> </tr> <tr> <td>EMEA</td> <td>97</td> </tr> <tr> <td>India</td> <td>273</td> </tr> <tr> <td>Philippines</td> <td>39</td> </tr> <tr> <td>Total</td> <td>463</td> </tr> </tbody> </table>	Region	# Workers who are not employees	Americas	185	Asia Pacific	13	EMEA	97	India	273	Philippines	39	Total	463		
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Total	463																
2-9 Governance structure and composition	2022 Proxy Statement (p.14-23)																
2-10 Nomination and selection of the highest governance body	2022 Proxy Statement (p.29-30)																
2-11 Chair of the highest governance body	Robin A. Abrams, one of FactSet’s independent directors, has served as Board Chair since June 23, 2020. 2022 Proxy Statement (p. 14)																

GRI Standard	Disclosure	Response/Location
GRI 2: General Disclosures 2021	2-12 Role of the highest governance body in overseeing the management of impacts	<p>Our CEO, along with our Board of Directors, is responsible for all business, operations, and risks of the company, including oversight of climate-related issues as they are integrated into the business, operations, and risks of FactSet.</p> <p>The Nominating and Corporate Governance Committee of the Board of Directors of FactSet is responsible for recommending nominations of directors and committee memberships and for taking a leadership role in defining and articulating the corporate governance principles and practices of FactSet. The Committee assists the Board in overseeing the company's position on ESG impacts and public issues of significance that affect key stakeholders of the company, including the environment.</p> <p>In assessing management's methods of optimizing stockholder value, the Board must also take into consideration other interested stakeholders, including employees, clients and vendors, as well as compliance with applicable law.</p> <p>The Board reviewed the effectiveness of our processes for overseeing our impacts for the first time in 2021, and we anticipate reviews at least every two years going forward.</p>
	2-13 Delegation of responsibility for managing impacts	<p>The Enterprise Risk Management (ERM) team is responsible for annually identifying and assessing key risk areas for the company, continuously monitoring risk areas for further developments, and reporting annually to our Board of Directors on risk identification, prioritization, and mitigation efforts. The risk identification process includes interviews with our senior leaders, surveys of our employees, and the review of internal processes, controls, and records.</p>
	2-14 Role of the highest governance body in sustainability reporting	<p>The Board of Directors oversees our ESG principles and implementation strategies while delegating day-to-day approval to the Executive Leadership Team. Direction is then provided to the Sustainability Committee for implementation. Each subcommittee of the Sustainability Committee meets regularly and routinely reports out to the Sustainability Committee, which also monitors the publication and dissemination of relevant sustainability reports and information.</p>
	2-15 Conflicts of interest	<p>Our Conflicts of Interest Policy prohibits board memberships, direct investment or controlling stakes in business partners, and related party transactions that do not comport with applicable laws. Conflicts of interest disclosures are made annually by FactSet's Board of Directors, and there is an escalation policy to review and approve any related party transactions. More information is available in the FactSet Code of Business Conduct & Ethics.</p>

GRI Standard	Disclosure	Response/Location
GRI 2: General Disclosures 2021	2-16 Communication of critical concerns	Our Audit Committee Charter states that the Audit Committee reviews our compliance and ethics program and oversees our risk assessment and risk management. The FactSet Ethics Action Line provides for reporting critical concerns of any nature, along with an internal process to review, escalate, and address concerns.
	2-17 Collective knowledge of the highest governance body	Presentations on environmental, social, and governance topics are given to the Board of Directors regularly.
	2-18 Evaluation of the performance of the highest governance body	Under the Nominating and Corporate Governance Committee's guidance, all directors evaluate their performance over the course of the fiscal year. The Committee also assists the Board in reviewing its effectiveness over the preceding fiscal year. The Committee assesses the overall quality of the material provided to the Board and the presentations made to the Board at least once each year.
	2-19 Remuneration policies	2022 Proxy Statement (p.40-60)
	2-20 Process to determine remuneration	2022 Proxy Statement (p.46)
	2-21 Annual total compensation ratio	CEO Pay Ratio = 348:1 2022 Proxy Statement (p.70)
	2-22 Statement on sustainable development strategy	Letter from CEO
	2-23 Policy commitments	FactSet is an active participant of the UN Global Compact, and a signatory of the UN Principles for Responsible Investment
2-24 Embedding policy commitments	FactSet's policy commitments are realized through our sustainability subcommittees that are responsible for the implementation of the related operational procedures. The subcommittees report out to the executive-led Sustainability Committee, which is overseen by the Executive Leadership team and the Board of Directors.	

GRI Standard	Disclosure	Response/Location
GRI 2: General Disclosures 2021	2-25 Processes to remediate negative impacts	Code of Business Conduct & Ethics
	2-26 Mechanisms for seeking advice and raising concerns	Employees are encouraged to seek advice and raise concerns by contacting FactSet's Chief Compliance Officer either directly or via one of several dedicated addresses or any member of the Legal or Human Resources Departments. In addition, the Ethics Action Line is a telephone, text, and web portal that can be used by anyone, both inside and outside the organization. Information on the Ethics Action Line is included on FactSet's intranet and in the FactSet Code of Business Conduct & Ethics , which is publicly available. The Ethics Action Line website is also listed in the Supply Chain Code of Conduct , which is also located on the public website.
	2-27 Compliance with laws and regulations	FactSet's Code of Business Conduct and Ethics and its related internal policies require compliance with all applicable laws and regulations around the world. Employees are required to report suspected misconduct, including any violation of law or regulations, either directly to the Legal or Compliance Departments or via the Ethics Action Line. The Compliance team investigates all allegations of legal violations, and any confirmed violations are reported to the Audit Committee of the Board of Directors, as appropriate.
	2-28 Membership associations	Human Rights Campaign Business Coalition for the Equality Act; Management Leadership for Tomorrow's Black Equity at Work and Hispanic Equity at Work; UN Global Compact (UNGC); UN Principles of Responsible Investment (UN PRI)
	2-29 Approach to stakeholder engagement	Stakeholder Engagement section (p.10) Diversity, Equity & Inclusion section (p. 27)
	2-30 Collective bargaining agreements	As of August 31, 2022, 393 of our employees were represented by mandatory works councils within certain of our French and German subsidiaries, and 24 of our employees were represented by collective bargaining agreements in the United States. 2022 Form 10-K (p.9)

GRI Standard	Disclosure	Response/Location
Material Topics 2021		
GRI 3: Material Topics 2021	3-1 Process to determine material topics	Our materiality assessment was established using a double materiality approach, which recognizes that businesses should report both internal impacts (topics that influence enterprise value) and external impacts (topics that impact the overall economy, society, and environment) (p. 10)
	3-2 List of material topics	Diversity, Equity, and Inclusion; Corporate Governance; Data Privacy; Data Security; Carbon Emissions; Climate Risk Management; Employee Learning and Development; Employee Engagement and Wellbeing; Sustainable Procurement; Business Ethics; ESG Products
Procurement Practices		
GRI 3: Material Topics 2021	3-3 Management of material topics	Supply Chain Code of Conduct Global Procurement Diversity Policy
GRI 204: Procurement Practices 2016	204-1 Proportion of spending on local suppliers	In fiscal 2022, FactSet established supplier-related policies, created a supplier questionnaire, and took steps to baseline supplier diversity. The administration of the questionnaire began in January 2023.
Anti-Corruption		
GRI 3: Material Topics 2021	3-3 Management of material topics	Business Ethics section (p. 54) Code of Business Conduct & Ethics (p. 35-36)
GRI 205: Anti-corruption 2016	205-1 Operations assessed for risks related to corruption	FactSet conducts regular risk assessments with enterprise-wide scope as part of its ERM and internal audit activities. These risk assessments cover areas of potential risk, including risk of bribery and corruption. To date, FactSet has not identified significant risk related to corruption.
GRI 205: Anti-corruption 2016	205-2 Communication and training about anti-corruption policies and procedures	FactSet's Code of Business Conduct and Ethics includes a prohibition of bribery. The Code of Conduct is acknowledged annually by FactSet's Board of Directors, as well as by the Executive Leadership Team and all FactSet employees. FactSet's Anti-Bribery and Corruption Policy and the Gifts & Entertainment Policy are posted on the company's intranet. FactSet's Supply Chain Code of Conduct , which is available to vendors and business partners and is published on our public website, includes a prohibition of bribery. In fiscal 2022, 98% of our employees completed a training on our Code of Business Conduct and Ethics, which included a section on anti-corruption.
	205-3 Confirmed incidents of corruption and actions taken	There have been no confirmed incidents of corruption during the reporting period.

GRI Standard	Disclosure	Response/Location
Emissions		
GRI 3: Material Topics 2021	3-3 Management of material topics	Carbon Emissions section (p. 17)
GRI 305: Emissions 2016	305-1 Direct (Scope 1) GHG emissions	1,796.03 Metric Tons CO2e
	305-2 Energy indirect (Scope 2) GHG emissions	6,400.26 Metric Tons CO2e
	305-3 Other indirect (Scope 3) GHG emissions	Scope 3 Emissions section (p. 18)
	305-4 GHG emissions intensity	0.0000044 CO2e/USD Revenue
	305-6 Emissions of ozone-depleting substances (ODS)	Not applicable based on the nature of FactSet's operations
GRI 305: Emissions 2016	305-7 Nitrogen oxides (NOx), sulfur oxides (SOx), and other significant air emissions	NOx: 23.2 Metric Tons SOx: 14.4 Metric Tons
Supplier Environmental Assessment		
GRI 3: Material Topics 2021	3-3 Management of material topics	Sustainable Procurement section (p. 23) Supply Chain Code of Conduct
GRI 308: Supplier Environmental Assessment 2016	308-1 New suppliers that were screened using environmental criteria	In fiscal 2022, FactSet established supplier-related policies, created a supplier questionnaire, and took steps to baseline supplier diversity. The administration of the questionnaire begun in January 2023.
	308-2 Negative environmental impacts in the supply chain and actions taken	In fiscal 2022, FactSet established supplier-related policies, created a supplier questionnaire, and took steps to baseline supplier diversity. The administration of the questionnaire begun in January 2023.

GRI Standard	Disclosure	Response/Location																																																																																										
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GRI 3: Material Topics 2021	3-3 Management of material topics	Employee Engagement & Wellbeing section (p. 40)																																																																																										
GRI 401: Employment 2016	401-1 New employee hires and employee turnover	<table border="1"> <thead> <tr> <th></th> <th></th> <th>Hires</th> <th>Hire Rate</th> <th>Turnover</th> <th>Turnover Rate</th> </tr> </thead> <tbody> <tr> <td rowspan="3">Gender</td> <td>Male</td> <td>1,744</td> <td>26.1%</td> <td>1,720</td> <td>25.8%</td> </tr> <tr> <td>Female</td> <td>1,296</td> <td>30%</td> <td>1,043</td> <td>24.1%</td> </tr> <tr> <td>Unknown</td> <td>85</td> <td>129.8%</td> <td>46</td> <td>70.2%</td> </tr> <tr> <td rowspan="5">Region</td> <td>Americas</td> <td>531</td> <td>22%</td> <td>562</td> <td>23.2%</td> </tr> <tr> <td>Asia Pacific</td> <td>100</td> <td>35%</td> <td>78</td> <td>27.3%</td> </tr> <tr> <td>EMEA</td> <td>243</td> <td>17.5%</td> <td>214</td> <td>15.4%</td> </tr> <tr> <td>India</td> <td>1,525</td> <td>35%</td> <td>1,250</td> <td>28.7%</td> </tr> <tr> <td>Philippines</td> <td>726</td> <td>27.8%</td> <td>705</td> <td>27%</td> </tr> <tr> <td rowspan="8">Age Group</td> <td>65+</td> <td>3</td> <td>16.2%</td> <td>4</td> <td>21.6%</td> </tr> <tr> <td>61-64</td> <td>9</td> <td>20.7%</td> <td>9</td> <td>20.7%</td> </tr> <tr> <td>51-60</td> <td>70</td> <td>18%</td> <td>41</td> <td>10.6%</td> </tr> <tr> <td>41-50</td> <td>102</td> <td>9.20%</td> <td>123</td> <td>11.1%</td> </tr> <tr> <td>31-40</td> <td>305</td> <td>9.30%</td> <td>501</td> <td>15.3%</td> </tr> <tr> <td>21-30</td> <td>2,522</td> <td>41.4%</td> <td>2,056</td> <td>33.7%</td> </tr> <tr> <td>Unknown</td> <td>114</td> <td>83.2%</td> <td>75</td> <td>54.7%</td> </tr> <tr> <td>Total</td> <td></td> <td>3,125</td> <td>28.3%</td> <td>2,809</td> <td>25.4%</td> </tr> </tbody> </table>			Hires	Hire Rate	Turnover	Turnover Rate	Gender	Male	1,744	26.1%	1,720	25.8%	Female	1,296	30%	1,043	24.1%	Unknown	85	129.8%	46	70.2%	Region	Americas	531	22%	562	23.2%	Asia Pacific	100	35%	78	27.3%	EMEA	243	17.5%	214	15.4%	India	1,525	35%	1,250	28.7%	Philippines	726	27.8%	705	27%	Age Group	65+	3	16.2%	4	21.6%	61-64	9	20.7%	9	20.7%	51-60	70	18%	41	10.6%	41-50	102	9.20%	123	11.1%	31-40	305	9.30%	501	15.3%	21-30	2,522	41.4%	2,056	33.7%	Unknown	114	83.2%	75	54.7%	Total		3,125	28.3%	2,809	25.4%
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	401-2 Benefits provided to full-time employees that are not provided to temporary or part-time employees	Employee benefits detailed on (pg. 41)																																																																																										

GRI Standard	Disclosure	Response/Location
Training and Education		
GRI 3: Material Topics 2021	3-3 Management of material topics	Employee Learning & Development section (p. 43)
GRI 404: Training and Education 2016	404-1 Average hours of training per year per employee	21 hours/employee/year
	404-2 Programs for upgrading employee skills and transition assistance programs	Employee Learning & Development section (p. 43)
	404-3 Percentage of employees receiving regular performance and career development reviews	100% of eligible workers received a review. Eligible workers are regular employees who started before June 1, 2022 (review was generated on August 1, 2022).
Diversity and equal opportunity		
GRI 3: Material Topics 2021	3-3 Management of material topics	Diversity, Equity & Inclusion section (p. 27) Code of Business Conduct & Ethics (p. 8) Human Rights Policy
GRI 405: Diversity and Equal Opportunity 2016	405-1 Diversity of governance bodies and employees	Diversity, Equity & Inclusion section (p. 27)
	405-2 Ratio of basic salary and remuneration of women to men	In fiscal 2022, we completed a global pay equity review. After controlling for various salary-influencing factors, the study found that there was not a statistically significant association at FactSet between salary and gender worldwide. On a global basis at our Company, women are paid more than 99% on average of what men are paid. Diversity, Equity & Inclusion section (p. 27)

GRI Standard	Disclosure	Response/Location
Non-discrimination		
GRI 3: Material Topics 2021	3-3 Management of material topics	Code of Business Conduct & Ethics (p. 19-20) Human Rights Policy
Freedom of Association and Collective Bargaining		
GRI 3: Material Topics 2021	3-3 Management of material topics	Code of Business Conduct & Ethics (p. 24) Human Rights Policy
GRI 407: Freedom of Association and Collective Bargaining 2016	407-1 Operations and suppliers in which the right to freedom of association and collective bargaining may be at risk	As of August 31, 2022, 393 of our employees were represented by mandatory works councils within certain of our French and German subsidiaries and 24 of our employees were represented by collective bargaining agreements in the United States. There were no risks to the freedom of association or collective bargaining at FactSet. No other employees are engaged in any activities to enter into additional collective bargaining agreements or other associations. 2022 Form 10-K (p.9)
Forced or compulsory labor		
GRI 3: Material Topics 2021	3-3 Management of material topics	Code of Business Conduct & Ethics (p. 24) Human Rights Policy
GRI 409: Forced or Compulsory Labor 2016	409-1 Operations and suppliers at significant risk for incidents of forced or compulsory labor	Human Rights Policy U.K. Modern Slavery Act Statement UNGC Principles
Security practices		
GRI 3: Material Topics 2021	3-3 Management of material topics	Code of Business Conduct & Ethics Human Rights Policy
GRI 410: Security Practices 2016	410-1 Security personnel trained in human rights policies or procedures	In fiscal 2022, new physical security training was completed by 215 employees. All new hires also completed a total of 9,884 hours of security and compliance training in addition to all employee completing a total of 16,555 hours of annual security training. Anti-harassment and discrimination training combined with Code of Business Conduct and Ethics training, which includes human rights issues, equaled a total of 18,664 additional hours of training.

GRI Standard	Disclosure	Response/Location
Local communities		
GRI 3: Material Topics 2021	3-3 Management of material topics	Community and Volunteerism section of the Report (p. 47) Human Rights Policy Code of Business Conduct & Ethics (p. 9)
GRI 413: Local Communities 2016	413-1 Operations with local community engagement, impact assessments, and development programs	Community and Volunteerism section of the Report (p. 47) https://go.factset.com/company/corporate-responsibility
Supplier Social Assessment		
GRI 3: Material Topics 2021	3-3 Management of material topics	Sustainable Procurement section (p. 23) Global Procurement Diversity Policy Supply Chain Code of Conduct
GRI 414: Supplier Social Assessment 2016	414-1 New suppliers that were screened using social criteria	In fiscal 2022, FactSet established supplier-related policies, created a supplier questionnaire, and took steps to baseline supplier diversity. The administration of the questionnaire begun in January 2023.
	414-2 Negative social impacts in the supply chain and actions taken	In fiscal 2022, FactSet established supplier-related policies, created a supplier questionnaire, and took steps to baseline supplier diversity. The administration of the questionnaire begun in January 2023.
Customer Privacy		
GRI 3: Material Topics 2021	3-3 Management of material topics	Data Privacy section (p. 51) Code of Business Conduct & Ethics (p. 30-31) Privacy Policy
GRI 418: Customer Privacy 2016	418-1 Substantiated complaints concerning breaches of customer privacy and losses of customer data	For fiscal 2022, FactSet has not identified any substantiated claims of a breach of customer privacy or any substantiated leaks, thefts, or losses of customer data.

SASB Table

SASB Accounting Metric	Response/Location	SASB Code
Activity Metrics		
Number of employees by (1) Full time and part time, (2) temporary, and (3) contract	11,203 total employees 463 total workers who are not employees	SV-PS-000.A
Workforce Diversity and Engagement		
% of gender and racial/ethnic group representation for executive management	Gender diversity: Men = 73.4% Women = 26.6% For demographic data, see p. 37	SV-PS-330a.1 (1)
% of gender and racial/ethnic group representation for all other employees	Gender diversity: Men = 60% Women = 40% For demographic data, see p. 37	SV-PS-330a.1 (2)
Voluntary turnover rate for employees	Overall rate is 25.4%	SV-PS-330a.2 (1)
Employee engagement as a percentage	89% of employees responded to the 2022 Employee Engagement survey. (2022 Form 10-K p.9)	SV-PS-330a.3



SASB Accounting Metric	Response/Location	SASB Code
Data Security		
Description of approach to identifying and addressing data security risks	Data Security section (p. 52) ERM section (p. 56)	SV-PS-230a.1
Description of policies and practices relating to collection, usage, and retention of customer information	Privacy Policy Code of Business Conduct and Ethics (p. 30-31)	SV-PS-230a.2
Number of data breaches	No material breaches	SV-PS-230a.3(1)
Percentage of data breaches involving customers' confidential business information (CBI) or personally identifiable information (PII)	For fiscal 2022, FactSet has not identified any substantiated claims of a breach of customer privacy or any substantiated leaks, thefts, or losses of customer data.	SV-PS-230a.3 (2)
Number of customers affected by data breaches	None	SV-PS-230a.3 (3)
Professional Integrity		
Description of approach to ensuring professional integrity	All FactSet employees are expected to adhere to the highest standards of business ethics and to act with integrity in their daily work activities. See FactSet Code of Business Conduct and Ethics .	SV-PS-510a.1
Total amount of monetary losses as a result of legal proceedings associated with professional integrity	None	SV-PS-510a.2



The logo for FactSet, consisting of the word "FACTSET" in a bold, blue, sans-serif font. The background of the slide features several abstract geometric shapes: a yellow circular pattern of small squares in the top center, a blue grid pattern in the top left, a blue sunburst pattern in the top right, a blue circular pattern of small squares in the middle right, and a yellow wavy line pattern in the bottom right.

Our commitment to corporate citizenship is built into all aspects of our business. FactSetters worldwide have a passion for making an impact on our business and in our communities. Our Sustainability Report highlights our commitment to strong governance, impactful community engagement, and our diverse and globally inclusive employees.

Visit us at www.factset.com for more information.