### FACTSET

# **CRM Solutions**

Get more value out of your CRM platform and enhance adoption by integrating FactSet's unique company content, entity linking, and flexible data delivery methods into your CRM.

| Sale          |   | FactSet Dashboard                      | FactSet Admin Ch    |                       | Q Search<br>eads V O                           | pportunities 🚿                            | ✓ Tasks ✓                       | Calendar 🗸 🖡               | People 🗸 Da                         | shboards 🗸 Reports 🗸 Files 🗸   | ★▼ 🗄 🌣 ? 🌣 🐥 🤅<br>Contacts ∨ More ▼        |  |
|---------------|---|--|---------------------|-----------------------|--|---|---------------------------------|----------------------------|-------------------------------------|--|--|--|
| FACTSE        | My Companies  |  |                     |                       |  |   |                                 |                            |                                     |  | Q Research Companies 🔯 🤇                   |  |
| 143.8         | 5 <sup>+0.760</sup> / <sub>(+0.53%)</sub> S&P 500<br>4,362.13                         | 19.760<br>-0.45%) Russell 200<br>1,831 |                     | ang Seng Ir<br>18,889 | ndex<br>9.97 -328.38<br>(-1.71%                | Gold 1,93                                 | 80.70 (+0.36%)                  | Brent Crude C<br>73.73 (-0 | oil (\$/bbl) Cr<br>.620<br>0.83%) 6 | ude Oil WTI (\$/bbl) Ethereum (ETH/USD<br>8.87 (-0.92%) 1,911.50 (+: |  |  |
|               |   |  |                     |                       |  |   | $\langle \bullet \circ \rangle$ |                            |                                     |  |  |  |
| My<br>mpanies | Coverage Client List  |  |                     |                       |  |   | Overview Cur                    | rrency U.S. Dollars 🗸      |                                     |  |  |  |
|               | Top Signals   |  | Type Comp           | bany                  | Events   |   |                                 | Re                         | cent Upcoming                       | Movers ↑   | 1D Price % Chg 🗸 Top Bottom                |  |
| C<br>Find     | Gilea   |  | harma Shopify       |                       | 23 Jun '23 - P                                 | etrofac Ltd A                             | nnual General Me                | eting                      |                                     | 8.41% KMX-US - CarMax  |  |  |
| rospects      |   | d Healthcare Tapestry                  | Tyson Fo            | ods                   | 23 Jun '23 - C                                 | arMax, Inc Q                              | 1 2024 Earnings Re              | lease                      |                                     | 4.80% SOVO-US - Sovos Brands, Ir                                     | nc.  |  |
|               | 1 31 Syne   |  | & Johnson E.W. Scri | pps Co                | 27 Jun '23 - P                                 | etrofac Ltd Q                             | 2 2023 Sales and                | Revenue Release -          | Trading Update                      | 3.44% NDLS-US - Noodles & Co.  |  |  |
|               | High-Impact 2 5.4% 1 2.7%<br>Signals Coherus BioSciences Friedrich V<br>2 5.4% 1 2.7% |  | Vorwerk Gr DISH     |                       | 27 Jun '23 - Delta Air Lines, Inc Investor Day |   |                                 |                            |                                     | 3.03% CHRS-US - Coherus BioSciences                                  |  |  |
|               |   | Systems Grainger                       | Intrepid            | Potash                | 27 Jun '23 - S                                 | '23 - Shopify, Inc Annual General Meeting |                                 |                            | 2.49% INFI-US - Infinity Pharma     |  |  |  |
|               | Company   | Symbol                                 | Price               | Price<br>Change       | Recent<br>News                                 | All<br>Signals ↓                          | Market Cap 🛈<br>(M)             | Revenue (M)                | Employees                           | Recent Event   | Upcoming Event                             |  |
|               | Gilead  | GILD-US                                | \$77.7              | -0.52%                |  | 9   | \$97,431                        | \$26,845                   | 17,000                              |  | 01 Aug '23 - Q2 2023 Earnings Release (Pri |  |
|               | Humana  | HUM-US                                 | \$450.39            | -1.33%                | New  | 8   | \$57,030                        | \$95,642                   | 67,100                              | 21 Jun '23 - Investor Meeting - Truist                               | 02 Aug '23 - Q2 2023 Earnings Release      |  |
|               | Ford Motor Co.  | F-US                                   | \$14.04             | -1.09%                | Viewed   | 8   | \$56,771                        | \$165,055                  | 173,000                             | 15 Jun '23 - Deutsche Bank Global Auto In                            | 26 Jul '23 - Q2 2023 Earnings Release (Pro |  |
|               | United Healthcare   | UNH-US                                 | \$480.6             | 0.32%                 | New  | 6   | \$446,011                       | \$335,944                  | 400,000                             | 13 Jun '23 - Goldman Sachs Global Health                             | 14 Jul '23 - Q2 2023 Earnings Release      |  |
|               | Coherus BioSciences   | CHRS-US                                | \$3.91              | 3.03%                 | Unread   | 6   | \$358                           | \$183                      | 359                                 | 16 Jun '23 - Acquisition of Surface Oncolo                           | 03 Aug '23 - Q2 2023 Earnings Release (Pri |  |
|               | E.W. Scripps Co.  | SSP-US                                 | \$7.78              | -0.06%                |  | 5   | \$656                           | \$2,415                    | 5,700                               | 08 Jun '23 - Gabelli Media & Entertainmen                            | 04 Aug '23 - Q2 2023 Earnings Release (Pri |  |
|               | Cisco Systems   | CSCO-US                                | \$50.37             | -1.47%                | New  | 4   | \$208,317                       | \$54,897                   | 83,300                              | 08 Jun '23 - Bank of America Securities Gl                           | 16 Aug '23 - Q4 2023 Earnings Release      |  |
|               | Barrick Gold  | ABX-CA                                 | \$16.37             | -0.19%                | Unread   | 4   | \$28,688                        | \$10,869                   | 23,000                              | 17 May '23 - Bank of America Global Metal                            | 14 Aug '23 - Q2 2023 Earnings Release (Pri |  |

#### MONITOR YOUR CLIENTS' BUSINESS DEALINGS IN A COMPREHENSIVE DASHBOARD

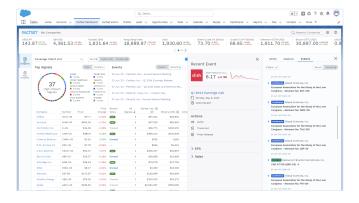
Examine your clients' business, analyze data, and identify key insights using FactSet's extensive private and public company data in a comprehensive dashboard that your entire team has access to.

- · Gain additional context on your clients by analyzing company-specific reports and data alongside client account records
- Stay up-to-date on events that are relevant to your clients and quickly identify the next best action with alerts from FactSet Signals
- · Uncover insights from news stories and events related to your clients' specific industries

## ESTABLISH OPPORTUNITIES FOR NEW BUSINESS WITH PROSPECTING TOOLS

Search across FactSet's company database to discover prospects to engage with and transform into new clients.

- Identify opportunities with FactSet's screening tool to research new prospects and leads that meet your criteria
- Streamline your research process by saving searches of companies for future assessment



### FACTSET

### BENEFIT FROM CONNECTED DATA

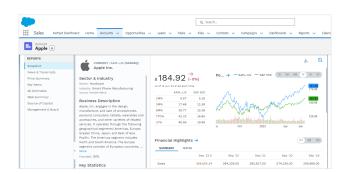
Strengthen your CRM with connected data using FactSet's market-leading entity data model that links disparate datasets to elevate client engagement.

- Activate a consistent and reliable data solution across your firm by integrating additional plug-ins, APIs, and data feeds
- Connect your client accounts to FactSet data to conduct robust research and analysis on markets
- Provide a richer CRM experience by saving relevant firmographic information and key market data across clients

## ENSURE ACCURACY AND CONSISTENCY USING DATA CLEANSING TOOLS

Power your CRM workflow with FactSet's automated data cleansing and concordance processes.

- Increase your confidence in the accuracy of your CRM data by using FactSet's extensive entity hierarchy data to ensure correct data linkages across subsidiaries and parent companies
- Remove duplicate data, eliminate stale content, and connect your client records to FactSet identifiers for consolidated, precise insight into your clients
- Customize the frequency of entity linking to FactSet identifiers based on the complexity of your CRM database



### FACTSET CONTENT



# ENRICH YOUR CRM RECORDS WITH TRUSTED, COMPREHENSIVE DATA COVERAGE

Capitalize on unique FactSet offerings to generate in-context analysis and insight that will increase efficiency and empower your team.

- View detailed descriptions, classifications, and financials for more than six million companies
- Access current contact information, education and employment profiles, and board membership details
- Gain a thorough perspective on supply chain relationships and take advantage of FactSet's diverse coverage of company operations, hierarchies, trade names, and multi-sector competitors
- Enhance pipeline visibility and take your workflow to the next level by providing your sales force with FactSet's industry-leading company data, market research, people, and contact details



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