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 eads V O	pportunities 🚿	✓ Tasks ✓	Calendar 🗸 🖡	People 🗸 Da	shboards 🗸 Reports 🗸 Files 🗸	★▼ 🗄 🌣 ? 🌣 🐥 🤅 Contacts ∨ More ▼	
FACTSE	My Companies										Q Research Companies 🔯 🤇	
143.8	5 ^{+0.760} / _(+0.53%) S&P 500 4,362.13	19.760 -0.45%) Russell 200 1,831		ang Seng Ir 18,889	ndex 9.97 -328.38 (-1.71%	Gold 1,93	80.70 (+0.36%)	Brent Crude C 73.73 (-0	oil (\$/bbl) Cr .620 0.83%) 6	ude Oil WTI (\$/bbl) Ethereum (ETH/USD 8.87 (-0.92%) 1,911.50 (+:		
							$\langle \bullet \circ \rangle$					
My 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 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% Signals Coherus BioSciences Friedrich V 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 Change	Recent News	All Signals ↓	Market Cap 🛈 (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

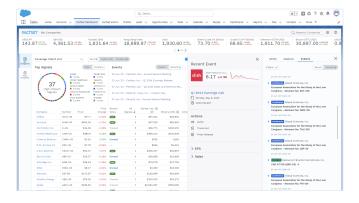
Examine your clients' business, analyze data, and identify key insights using FactSet's extensive private and public company data in a comprehensive dashboard that your entire team has access to.

- · 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

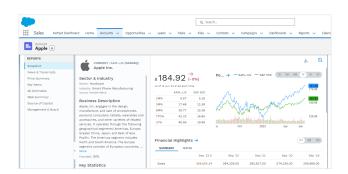
Strengthen your CRM with connected data using FactSet's market-leading entity data model that links disparate datasets to elevate client engagement.

- 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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