

FactSet AI

Make better—and faster—decisions with FactSet as your trusted AI partner. With 45 years of providing investment professionals with a digital platform, combining linked and contextualized data and flexible solutions, we've developed a deep understanding of your workflows. Our innovative AI capabilities, built on top of our expansive, connected data, mean you can trust us to help you do your best work.



REIMAGINE YOUR FACTSET EXPERIENCE WITH AI-POWERED INSIGHTS & WORKFLOWS

Dig deeper, think bigger with mile-wide discoverability

- Benefit from a reimagined conversational user experience that enhances research and analysis.
- Get answers to your most difficult questions, grounded in trusted FactSet data, delivering user confidence through seamless auditability and source linking.
- Access large language model-generated summaries of U.S. earnings call transcripts via StreetAccount.

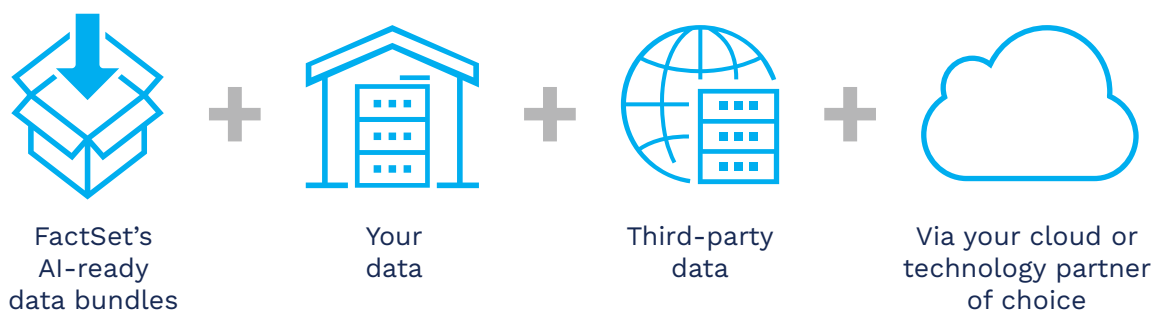


Work smarter with mile-deep workflow automation

- Elevate your FactSet experience with AI-augmented workflows for research, banking, asset management, and wealth management.
- Streamline search and navigation with natural language processing (NLP).
- Supercharge research by recognizing themes, identifying sentiments, and extracting answers from text content, including research, transcripts, news, filings, and websites.

Access data where you want it with mile-high innovation acceleration

- Seamlessly integrate FactSet's data into your solutions via our open, flexible technology platform and ecosystem.
- Access FactSet connected data via APIs, cloud providers, or CRM solutions to drive the innovation you seek with the industry's most reliable, foundational data.



WHY FACTSET IS YOUR AI PARTNER

1. **Expertise:** 45 years as your partner delivering financial data, analytics, and open technology to nearly 190K users across 8K+ institutional clients globally, 4M+ institutional portfolios, and >95% client retention.
2. **Intentional AI:** Strong foundation committed to address hallucinations and unintended consequences crafted with auditability.
3. **Fact-Based AI:** Models depend on quality and breadth of reliable data. FactSet delivers best-of-breed data with smart, connected data models for seamless connection and integration. Fact-based training data is essential.
4. **Data Excellence:** Our comprehensive suite of trusted and connected data powers the world's leading financial institutions. Hedge funds, asset managers, investment banks, wealth firms, private equity, venture capital, and global corporations trust FactSet to integrate and manage their data with breadth of proprietary, client, and third-party data from over 800 sources.
5. **AI/ML Experience:** AI/ML team, founded 15+ years ago, created a suite of impactful AI solutions available in FactSet today. Leveraging large language models (LLMs) since 2018 and GPT4.0 solutions already in production.
6. **ROI:** FactSet can deliver for you or partner with you, whatever works best. The maintenance of generative AI solutions can be handled by FactSet with economies of scale across our client base.
7. **Early Access & Co-Development:** Benefits include early access to new solutions and enhancements and the ability to co-develop bespoke offerings.