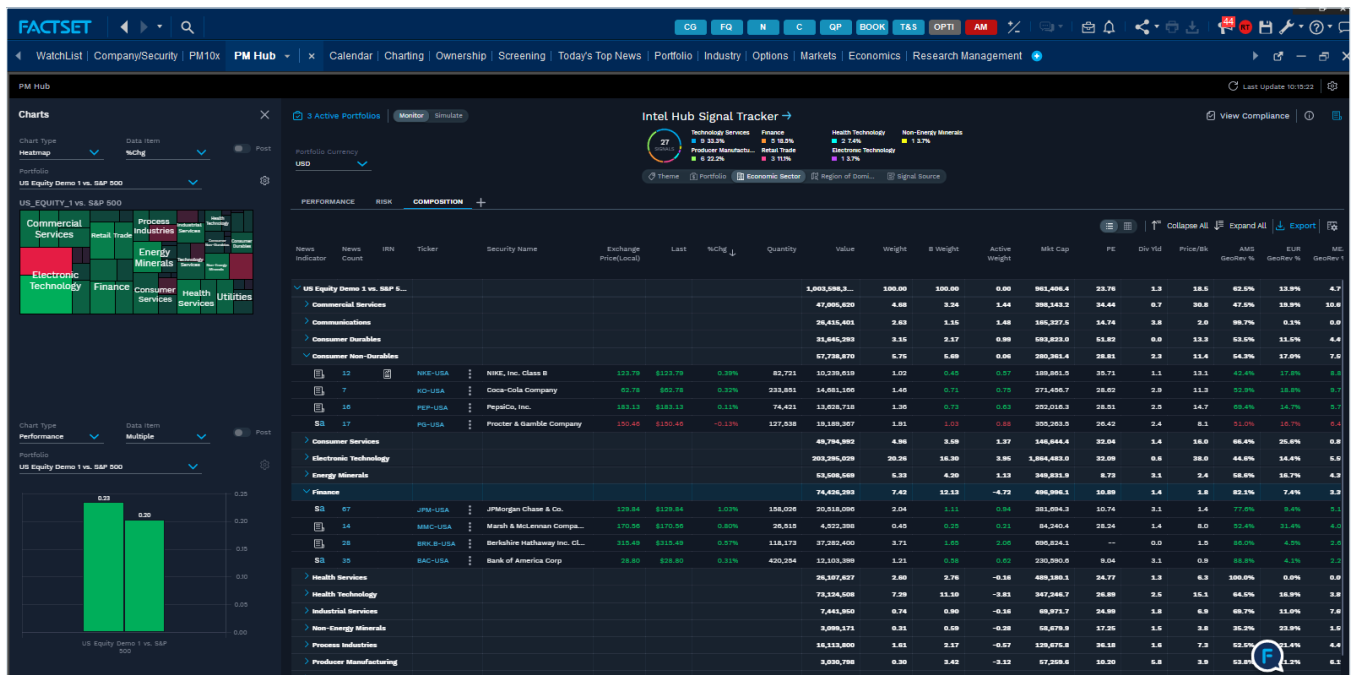


FactSet PM Hub

Uncover key portfolio insights, simulate ideas, and surface key data points to consistently make confident decisions and improve investment outcomes.



DEEPEN INSIGHT WITH INTRADAY AND REAL-TIME PORTFOLIO MONITORING

Streamline your investment process and increase profitability with access to intraday news, research, and metrics in one place.

- Analyze portfolio characteristics, performance, and risk and flag for outliers in real time to stay up to date on changes
- Track movements in your portfolio, such as splits, buy-backs, and insider activity using signals to gain intraday insights that indicate potential price movement
- Monitor your portfolio's health and identify opportunities by analyzing risks and highlighting areas that require attention
- View metrics such as VaR, Tracking Error, Predicted Beta, and Total Risk to recognize underlying risks that lie in your portfolio
- Filter out the noise and quickly access relevant, real-time news about the companies and markets you care about with FactSet StreetAccount

CONCEPTUALIZE IDEAS WITHIN A SIMULATED ENVIRONMENT

Benefit from a system that helps you build and visualize your thesis with greater confidence.

- Create and test your hypothesis with simulated trading and allocation at the security, group, portfolio, and multi-portfolio level
- Compare pre- and post-trade portfolios to generate proposed trade orders easily
- Seamlessly export trades for execution by integrating FactSet Portfolio Management Platform (PMP) into your existing order and execution management systems or with FactSet EMS

equity											Roll	+	
Full View Simulation Summary												Modified	New
Ticker	Security Name	T	Last	Value	%Chg	Cash Source	Cash Destination	Post Quantity	Value	Post Value			
US Equity Demo 1 vs. S&P 500									5,000,013.3	5,000,013.3			
Commercial Services									47,463.10	50,038.97			
0	WMT-USA	Walmart Incorporated CL	0	\$181.11	\$80.91	0.00%	CASH_USD	--	\$0.00	\$80,910.00			
0	WMT-USA	Walmart Incorporated	0	\$181.11	\$80.91	-0.00%	CASH_USD	--	\$0.00	\$80,910.00			
0	WMT-USA	Walmart Inc. Class A	0	\$181.11	\$80.91	0.00%	CASH_USD	--	\$0.00	\$80,910.00			
Energy Minerals									6,038.04	6,038.79			
0	CVX-USA	Chevron Corporation	0	\$107.24	\$17.81	-0.71%	CASH_USD	--	\$17,810.00	\$17,810.00			

RECEIVE IMMEDIATE ANSWERS TO INQUIRIES USING CHAT

Elevate your portfolio management skillset by receiving answers to portfolio-related questions.

- Receive answers in an instant, throughout the day by using PM assistant's chat functionality to ask questions related to your portfolio analysis or generalized questions about FactSet
- Benefit from a system that consistently improves results based on the feedback it receives from PMs

QUICKLY IDENTIFY THE NEXT BEST ACTION WITH SIGNALS

Uncover unique insight and discover untapped opportunities with your portfolio.

- Create customized, automated signals and alerts based on FactSet and client data to showcase relevant events, such as rankings and price movements
- Make informed decisions by leveraging historical trade data to analyze behavioral tendencies
- Leverage behavioral analysis with add, sell, and idea suggestions to make effective allocation decisions

