

Research Automation APIs

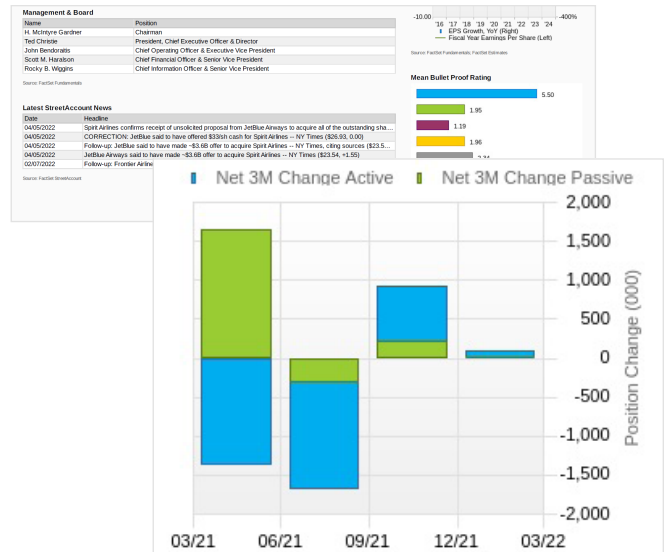
Automate your investment research processes by staying alert on relevant and material events, creating presentation-ready documents, and extracting names from documents with FactSet's APIs to streamline your research workflow.

The screenshot displays the FACTSET:Developer API Catalog. At the top, there are social media icons and the FACTSET logo. Below is the 'FACTSET:Developer' header with navigation links for APIs, Business Workflows, Recipes, and Learn. The main content area is titled 'Home > API Catalog'. On the left, there is a search bar and a filter section for 'News & Document Processing'. The main area features three API cards:

- Utility Signals API:** Leverage Signals to identify material events for a company. Signals are derived from FactSet's core data, cognitive computing technology, and our 3rd party partners.
- AI/ML Natural Language Processing API:** These APIs leverage natural language processing to help extract meaningful data from unstructured text.
- AI/ML FactSet NER:** The FactSet NER service extracts Company/Person/Location names from the text of a document. In addition, this service also provides the best-matching FactSet IDs for the extracted names.

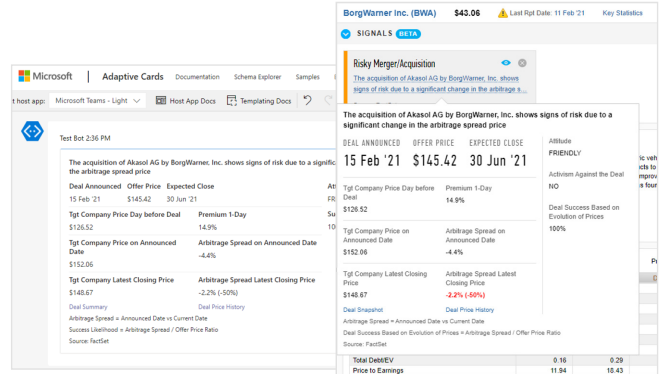
CREATE PRESENTATION-READY PDFS WITH BOOKBUILDER API

Increase productivity with FactSet's BookBuilder API that automatically creates presentation-ready custom-report packs and PIBs using data from your companies of interest. Easily create and share books by leveraging pre-saved custom templates with content from FactSet's extensive datasets, and access historical books to view and edit previous content. Build custom reports using robust company data, news, internal and external research, charts, investor slides, and M&A data.



STAY ALERT TO RELEVANT MATERIAL EVENTS WITH SIGNALS

Eliminate information overload with contextual insights from FactSet Signals that use artificial intelligence, cognitive computing, and rules-based methods to present the information most relevant to you. Intelligently identify events affecting companies, markets, and news by receiving alerts through Signals API. Spend more time making empowered investment decisions and less time sifting through reports, filings, and other documents. Set up rules on Signals to receive alerts when there are changes in your coverage. Access Signals within the FactSet workstation, internal portals, or through your CRM systems and mobile apps.



EASILY EXTRACT NAMES FROM COMPANY DOCUMENTS

Quickly extract and map named companies, people, and locations from plain text or HTML content within documents using FactSet Named Entity Recognition (NER). Match entities to FactSet identifiers instinctively to power automation processes and further your analysis. Link internal and third-party documents with other FactSet datasets, such as fundamentals or ownership.

AUTOMATICALLY CREATE AND DELIVER BOOKS TO BANKERS IN ADVANCE OF MEETINGS

Come prepared for meetings by combining Microsoft Power Automate with FactSet APIs to create books that automatically send to bankers ahead of meeting time. Utilize FactSet APIs to extract company information from documents, request detailed reports, and identify material events. Get automatically notified in Microsoft Teams when a book is ready.

