Solutions for Institutional Asset Managers

Power your investment decisions with FactSet’s comprehensive solutions for company, market, ESG investing, and fund analysis. Enhance your performance and maintain compliance by leveraging robust analytics for multi-asset class portfolio and risk management.

MONITOR YOUR PORTFOLIO PERFORMANCE WITH BEST-IN-CLASS RISK ANALYTICS

Analyze risk across your portfolio by leveraging sophisticated risk analytics, premier models, global multi-asset class data, and APIs. Determine current and historical portfolio exposures on an absolute basis or relative to its set benchmarks. Arrive at actionable investment decisions and ensure consistency across your front, middle, and back office.

- Transform core analytics and internal data into presentation-ready documents such as fund factsheets, marketing pitchbooks, or internal board reports
- Effortlessly ensure compliance with new and emerging regulations when performing calculations
- Perform attribution analysis for fixed-income and multi-asset class portfolios to complement your investment strategy
ELEVATE YOUR SUSTAINABLE INVESTMENT STRATEGY WITH ESG DATA

Optimize your portfolio construction, risk management, and multi-asset class reporting with FactSet’s ESG investing solutions. Seamlessly integrate content from FactSet and third parties into your workflow to perform deep analysis and meet ESG regulatory reporting requirements for The Sustainable Finance Disclosure Regulation (SFDR).

- Build, test, and enhance your investment strategies
- Construct ESG scores using commentary from relevant news sources and top sustainable investment themes

IMPROVE PERFORMANCE BY CONNECTING YOUR FRONT OFFICE

Promote collaboration across your organization by using a consolidated platform that drives your front office to improve performance. Power the work of your analysts, traders, and portfolio managers with a consolidated platform that allows for data consistency across your firm. Keep up with the latest in research methods and explore new ideas with FactSet’s Quantitative Research Environment, a flexible open-source JupyterLab platform that provides programmatic access to industry-leading data and analytical applications.

CONDUCT COMPREHENSIVE ANALYSIS WITH INDUSTRY DATA

Monitor trends within companies, economies, and global markets with FactSet’s extensive data. Access data on thousands of companies in various industries to examine their pricing, credit strength, or debt profile. Use benchmark, economic, and market aggregates data to analyze relationships.

- Leverage real-time news summaries, previews, recaps, and post-analyst commentary with StreetAccount
- Quickly search for keywords and phrases in documents like news stories, filings, research reports, and earnings transcripts using smart search

BE PREPARED WITH PRESENTATION-READY DOCUMENTS

Automate your reporting processes by extracting portfolio analytics and internal data from data warehouses to create diverse client-facing documents such as pitchbooks and regulatory filings. Use FactSet APIs and visualization tool plugins to create customized reports. Leverage FactSet’s integration with Microsoft PowerPoint to present data through charts, graphs, and tables.