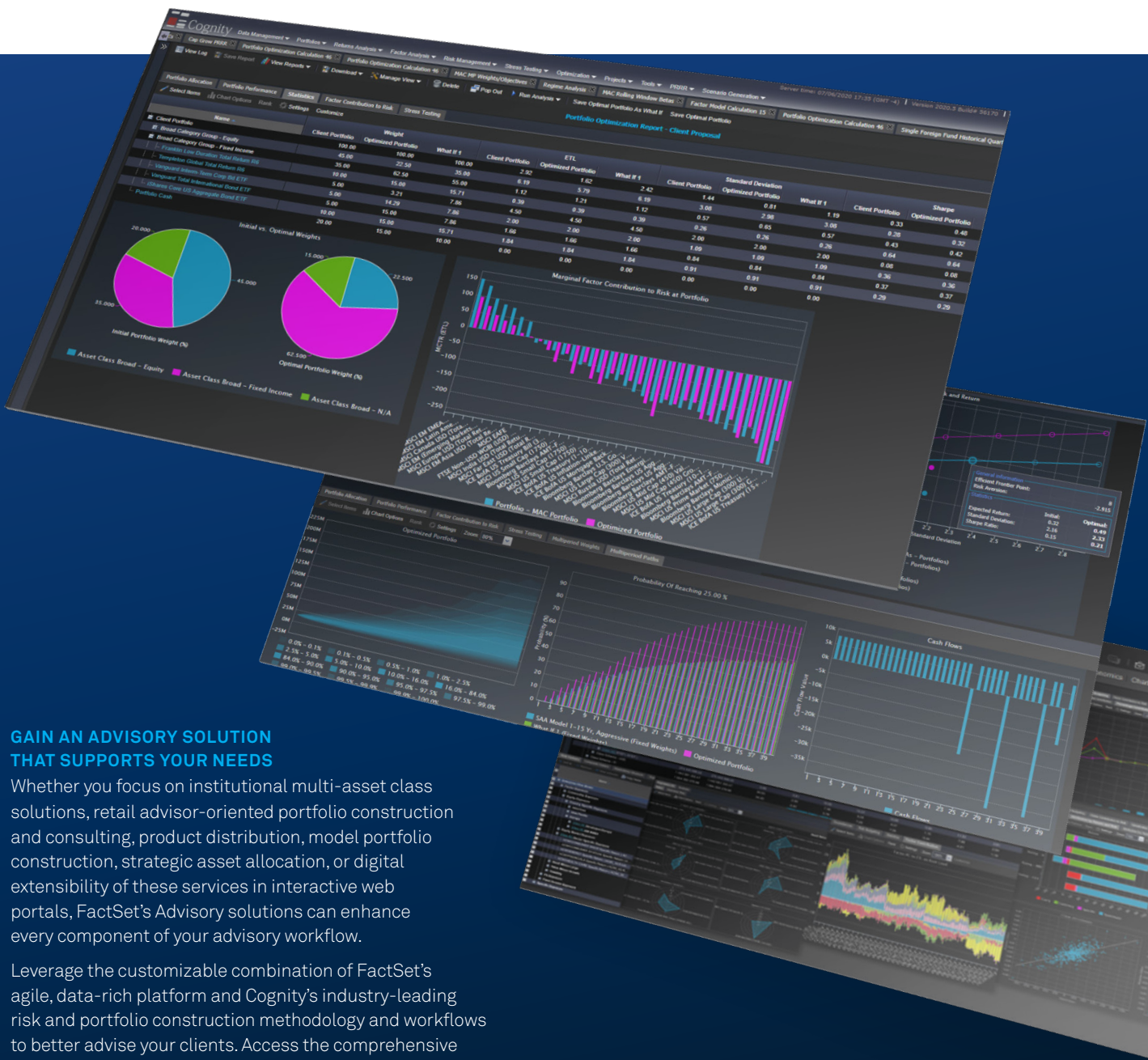


FACTSET ADVISORY SOLUTIONS

Enhance client engagement and scale your market outreach with high-touch advisory services. Support funded and model portfolio construction with institutional-grade portfolio analytics and next generation Multi-Asset Class Portfolio Construction tools. Position yourself for the long term with FactSet's scalable, sophisticated advisory solutions.

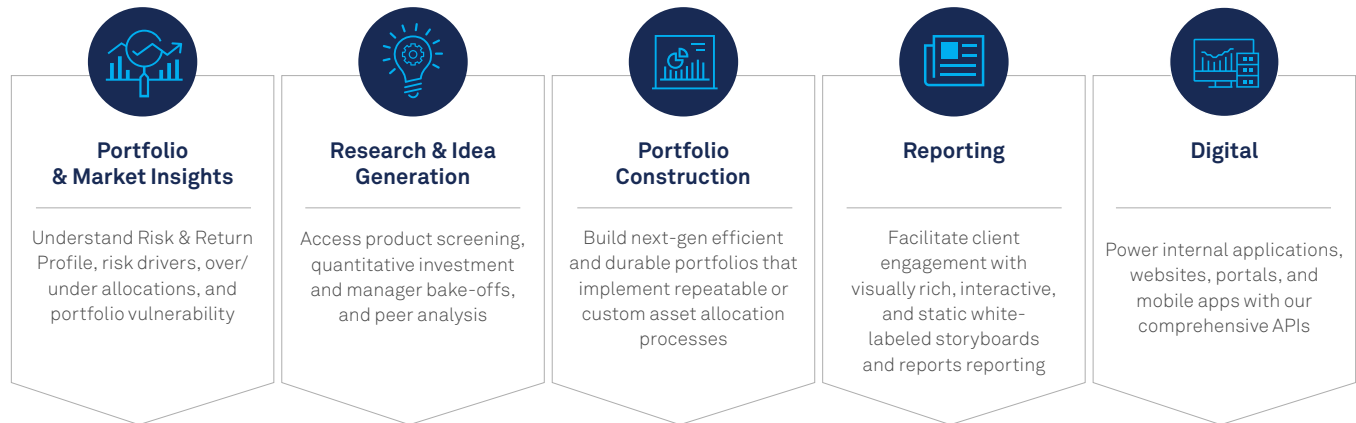


GAIN AN ADVISORY SOLUTION THAT SUPPORTS YOUR NEEDS

Whether you focus on institutional multi-asset class solutions, retail advisor-oriented portfolio construction and consulting, product distribution, model portfolio construction, strategic asset allocation, or digital extensibility of these services in interactive web portals, FactSet's Advisory solutions can enhance every component of your advisory workflow.

Leverage the customizable combination of FactSet's agile, data-rich platform and Cognity's industry-leading risk and portfolio construction methodology and workflows to better advise your clients. Access the comprehensive tools, content, and technology to counsel your clients with strategy and confidence.

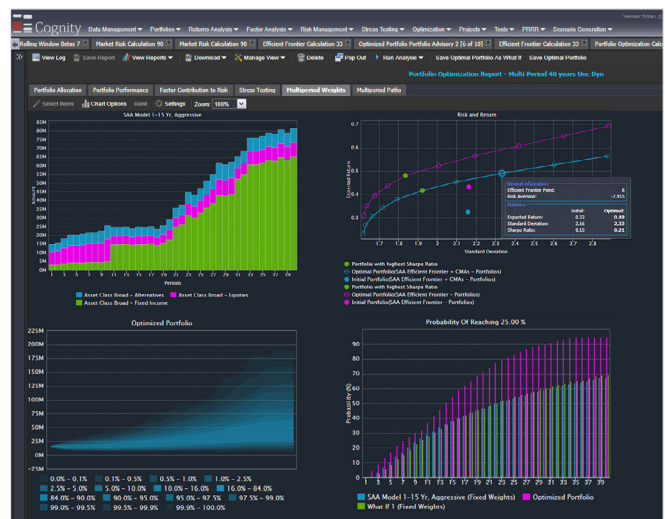
**YOUR SERVICE MODEL. ONE BUSINESS ENGINE.
A FULL SET OF INTEGRATED TOOLS FOR ADVISORY SERVICES.**



INTEGRATED OMNIPLATFORM | COHERENT WORKFLOW
MULTI-ASSET CLASS | PATENTED METHODOLOGY | FLEXIBLE

BUILD BETTER PORTFOLIOS

Gain next-generation, institutional-grade analytics capable of improving existing advisory relationships and winning new business. Identify challenges and opportunities in client and model portfolios using sophisticated, consistent, and scalable value-added portfolio diagnostic tools. Design durable portfolios that achieve long-term targets and survive extreme market downturns with a new generation of multi-asset class analytics including, iterative “what-If” pre-trade decision support, multi-period objectives-based optimization tools, and more. Apply your investment expertise and experience to your client’s portfolio by incorporating your capital market assumptions directly within the modeling framework.



ENHANCE ADVISORY RELATIONSHIPS AND WIN NEW BUSINESS:

- Multi-asset class risk
- Multi-factor models
- Expansive asset coverage
- Style and peer group analysis
- Stress testing
- Integrated market data
- Advanced single and multiperiod optimization
- What-if (pre-trade) scenarios

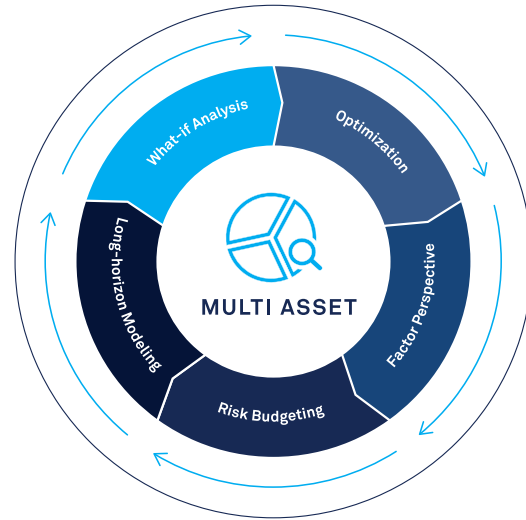
WHO WE SERVE:

PORTFOLIO CONSTRUCTION & CONSULTING
DISTRIBUTION | MODEL PORTFOLIO CONSTRUCTION
MULTI-ASSET SOLUTIONS | ASSET ALLOCATION
OCIO | DIGITAL SERVICES & MARKETING TEAMS

FACTSET > SEE THE ADVANTAGE

STRENGTHEN PORTFOLIO CONSTRUCTION WORKFLOWS

Stop relying on disparate technologies with FactSet's fully integrated, end-to-end solution. Fine-tune portfolio allocations in an intuitive and highly iterative user interface that features powerful pre-trade decision support tools. Perform what-if analysis, portfolio optimization, stress and scenario testing, ex-ante market risk decomposition, and portfolio optimization back-testing across all risk and return measures to help build better portfolios. Gain insight into reallocation decisions, factor-based portfolio construction mandates, and the impact of tail-risk hedges based on an investment's contribution to risk and return, then backtest your optimization strategies. Measure the impact of proposed manager and allocation changes, and stress test your portfolio to identify ways to mitigate losses. Leverage advanced optimizers to generate portfolios with flexible constraints and objective settings.



ECOSYSTEM OF INTEGRATED ANALYTICS, DATA, & USER SUPPORT TOOLS



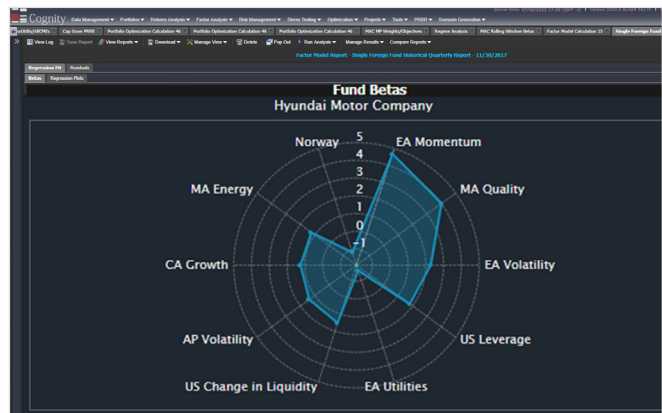
LEVERAGE POWERFUL MULTI-PATENTED PORTFOLIO DIAGNOSTICS

Rely on advanced decision support tools to gain holistic views of your client portfolios and find opportunities to build better portfolios with advanced insights into the dependence structure between investment holdings, factor exposures, and risk sensitivities. Gain a full, transparent view of risk and return distribution at the portfolio, factor, and asset levels with a choice of models that match your investment process. With a wide range of measures and capabilities, FactSet offers the ability to measure risk/return across all asset classes.

Extend your investment management workflow with seamless integration into FactSet's core post-trade tools including Portfolio Analysis and Style Performance and Risk. Access comprehensive ex-post analytical options, flexible reporting, and charts. FactSet's full range of portfolio diagnostic and portfolio construction analytics combines all the data and flexibility you need to examine your portfolio across asset classes and strategies.

CONDUCT ADVANCED QUANTITATIVE INVESTMENT AND MANAGER "BAKE-OFF" ANALYSIS

Understand the pre-trade impact of otherwise similar investments on the risk and return profile dynamics of a client's multi-asset class portfolio. Explore and compare an investment's ex-ante potential and ex-post performance impact based on point-in-time data or rolling through-time risk and return measures, correlations, and get advanced statistics with rich pre-trade decision support and visualizations.



FACTSET > SEE THE ADVANTAGE

RELY ON SEAMLESSLY INTEGRATED HIGH-QUALITY DATA

Gain access to fully sourced and integrated datasets to drive all your analytical needs including bottom-up and top-down data. Drive all aspects of your multi-transparency investment management processes with FactSet proprietary data and hundreds of third-party datasets. Available datasets include time series of returns, prices, terms and conditions, constituent holdings, market risk factor data, benchmarks, ESG scores, exposures, curves, volatilities, and more. Experience a lower cost system implementation, faster time to market, and improved return on investment, resulting in lower system implementation project risk. Seamlessly integrate your firm's proprietary data including portfolios holdings, classification schemes, custom investment scoring, and exposures.

POWER DIGITAL STRATEGIES WITH AN API FRAMEWORK

Leverage FactSet's high-performant, low-latency application programming interface (API) framework to seamlessly integrate and automate data and process flows between your internal systems and FactSet's highly scalable hosting environment. Digitally extend your portfolio diagnostic and construction workflows via our API bridge to create web portals that enable you to communicate your unique value proposition directly to clients. Put digital portfolio construction tools in the hands of your sales teams to promote higher levels of client engagement and a deeper understanding of your investment proposals. Connect internal portfolio construction managers and consultants on the same platform as sales teams and external clients with our on-platform and off-platform solutions.



CREATE HIGH-QUALITY CLIENT-FACING STORYBOARDS

Improve client engagement and communicate the value of your investment analysis and portfolio recommendations with premium highly visual reporting. Help your clients better understand the impact of proposed allocations and evaluate key metrics through custom white-labeled reports and multi-page storyboards designed expressly for their review.

Leverage FactSet's client reporting suite to automate your reporting process, combining key portfolio analytics. Incorporate clients' brand colors, logos, and other preferences alongside your unique disclaimers for a completely bespoke deliverable. Share reports directly with clients, or empower them to access them via a dynamic web portal that can integrate with your existing platform.