

CLIENT REPORTING SOLUTIONS

› Automate your reporting process by combining key portfolio analytics with your proprietary content in a client-facing document.



GAIN A REPORTING SOLUTION TO MEET YOUR WORKFLOW NEEDS

Access a scalable, flexible solution, tailored for your firm's preferred reporting method. FactSet Publisher enables you to place the burden of managing data uploads, calculations, document creation, and data hosting on FactSet. The tool is contingent on your firm's use of our Portfolio Analytics suite and workstations. Alternatively, Vermilion offers a data-agnostic, cloud-based solution that is accessible without a FactSet workstation. Rely on Vermilion to manage your entire client reporting process from data updates, data and commentary sign-off, document generation, and distribution.

STREAMLINE YOUR REPORTING PROCESS

Improve your time to market each reporting period with an efficient workflow that consolidates qualitative and quantitative data from multiple sources into one document. Vermilion provides a workflow solution that allows for live process management, monitoring, and administration to provide transparency throughout the reporting process. FactSet Publisher manages this process for you.



MERGE ANALYTICS IN PUBLISHED DOCUMENTS

Produce client-ready documents that bring together holdings- and returns-based analysis with your firm's proprietary content. Create documents that combine portfolio analytics, such as performance attribution and weights, alongside returns-based style, risk, and peer universe analysis. Integrate qualitative proprietary information into your finished documents, including, investment guidelines, disclosures, and commentary.

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CUSTOMIZE DOCUMENTS TO FIT YOUR CORPORATE IDENTITY

Generate reports that reflect your firm's branding down to the smallest detail. Control every aspect of each document, from the headers and footers to the color palette, to reflect your corporate identity. Once created, a single document, collection of documents, or library of components are at your disposal. Batch produce client-ready polished reports at month- or quarter-end, or create ad hoc reports as needed.

CREATE SCALE TO GROW

Keep up with Big Data, increasingly complex regulatory requirements, and growing client demands with scalable reporting solutions. FactSet Publisher and Vermilion offer flexible tools to help your firm address the market's rising need for client reporting.

EXPERIENCE THE FACTSET DIFFERENCE

FactSet combines integrated financial information, powerful analytics, and industry-leading client services to provide highly customized workflow solutions to the global investment community. Our fully tailored services combine premium, comprehensive data with the unrivaled functionality of powerful financial analysis tools.