SOURCE PUBLIC AND PRIVATE MARKET OPPORTUNITIES
Access comprehensive company fundamentals, estimates, capital structure, ownership, and news for a global universe of public and private companies.

- Source and analyze financials and identify critical opportunities with in-depth data and reports
- Leverage FactSet’s robust universe of private companies to uncover investment and advisory opportunities
- Run Pro-forma M&A analysis across geographic revenues, supply chains, and business lines
- Monitor fundraising and investment activity for more than 18,000 venture capital and private equity firms
- Introduce key FactSet reports into your CRM portal for instant access to detailed company information

TRACK FILINGS, RESEARCH, AND NEWS
Monitor market-moving news and events, view regulatory filings, and access broker research all in one place.

- Access a global repository of regulatory filings, key exhibits, credit agreements, prospectuses, merger agreements, and more
- Obtain investment research from over 1,300 brokers and independent research providers
- Review real-time market commentaries and summaries of broker opinions and company releases with StreetAccount news
- Build dynamic public information books (PIBs) by combining a variety of data from filings to transcripts and internal research notes into a single, presentation-ready PDF
- Perform advanced document searches across unstructured data to uncover trends and generate ideas
EVALUATE TRANSACTIONS AND FINANCING ALTERNATIVES
Leverage detailed analytics for the M&A, debt, and equity markets, capturing the interdependencies across all transactions.

• Search across M&A transactions for valuations, disclosed fees, deal characteristics, and source documents
• Gain insight into highly negotiated provisions, evaluate takeover defenses, and monitor activist campaigns
• Evaluate equity market conditions with FactSet’s coverage of IPOs, follow-ons, share repurchases, and PIPEs
• Analyze terms and conditions, key documents, pricing, and analytics for fixed income securities

STREAMLINE YOUR WORKFLOW
Create models, audit information, and generate presentations.

• Retrieve and analyze data in Microsoft Excel more efficiently with FactSet codes. Quickly audit FactSet formulas back to the source document, understand the breakdown of the calculation, access additional company information, and more
• Power the pitch book process by building and linking dynamic Excel charts and models with PowerPoint
• Improve modeling speed and efficiency with keystroke driven spreadsheet tools and custom hotkeys
• Import tables and text from public or proprietary HTML and PDF files into Excel while preserving an audit trail to the source

ANALYZE INDUSTRY AND ECONOMIC TRENDS
Perform top-down sector and regional analysis with an array of industry-level metrics and premier economic data.

• Access performance, financials, estimates, news, research, and company revenues by location for more than 7,000 country and over 20 regional industries using FactSet and GICS classifications
• Compare valuation and performance metrics for countries and industries
• Analyze trends in key macro-economic indicators via macro factors and economics reports
• View fixed income lending rates, global policy rates, government yields, credit default swaps, and corporate spreads