GENERATE NEW IDEAS AND OPPORTUNITIES

Gain access to powerful tools designed to help you identify opportunities and generate new ideas.

- Monitor insightful, real-time news for the companies and markets you cover with news from FactSet StreetAccount, filings and transcripts, custom alerts, and more
- Stay on top of earnings season with access to FactSet StreetAccount’s Earnings Previews, Conference Call Guidance, and Street Takeaways, which summarize broker comments for conference calls, analyst presentations, and other company events
- Use an interactive calendar to track economic releases and company events, access earnings call information, and read event transcripts
- Screen for companies, holders, equity, or fixed income securities based on your specific criteria or choose from a collection of quick screens

ENSURE ACCURATE VALUATIONS

- Export FactSet’s historical data to Microsoft Excel to quickly build auditable earnings models and understand a company’s key performance drivers
- Find and assess non-consensus forecasts
- Review historical valuation metrics, including P/E, EV/EBITDA, and a host of others
- Easily graph historical valuation and reactions to catalysts
- Capture and import data and text from HTML and PDF documents while preserving an audit trail back to the source file
- Leverage FactSet’s industry-leading Excel tools to extract and analyze data to suit your unique approach
SUPPORT IDEAS WITH THOROUGH DUE DILIGENCE
Power your research workflow with robust global market and company data.

- Gain country- and region-level insight with a broad range of macroeconomic, index, interest rate, and other data
- Review a company’s geographic revenue mix to determine its true performance and risk
- Analyze markets, sectors, and your coverage list with aggregate-level ratios and par share values
- Consistently compare company financials with detailed industry-specific metrics in unique, auditable financial statement reports

- Identify a company’s suppliers, customers, and partners
- Accurately analyze stock performance expectations with estimates for key sector- and product segment-specific indicators
- Access estimate data to see broker revisions that resulted from new information, and identify out-of-consensus broker-level estimates
- Examine public and private company sources of capital across IPOs, follow-ons, private placements, funding rounds, loans and more
- Efficiently review additions, changes, and deletions to incoming company regulatory filings as compared to previous filings

TRACK USAGE AND SHARE INTERNAL RESEARCH WITH COLLEAGUES
Leverage a powerful research management workflow and seamless Microsoft Office integration to share your research, track usage, and comply with global regulations.

- Comply with MiFID II regulations by assessing the quality and quantity of broker research you consume on FactSet
- Easily create, store, and disseminate ideas across your firm with FactSet’s Research Management Solutions
- Combine your firm’s data, such as analyst estimates, internal research, meeting notes, and recommendations, with real-time market data
- For the sell-side, control and customize who can access your research and know who is consuming your product with comprehensive and flexible entitlements
- Incorporate and update data such as disclosures, bios, and industry slides from your firm’s library of approved Microsoft PowerPoint presentations
- Import data to Microsoft Excel to create charts in your firm’s standard design and automatically update them with the latest data