

ACADEMIC CASE STUDY: UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

> FactSet’s intuitive interface makes data easily accessible, allowing UNC students more time to focus on their analysis.



| NAME | TITLE | SCHOOL | TOTAL MBA STUDENTS | TOTAL UNDERGRAD BUSINESS STUDENTS |
|-------------|--|---|--------------------|-----------------------------------|
| Jim Britton | Associate Director, Capital Markets Lab and MBA for Executives | University of North Carolina at Chapel Hill | 880 | 700 |

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CHALLENGE

Jim Britton, Associate Director of the Capital Markets Lab at the Kenan-Flagler Business School at the University of North Carolina (UNC) at Chapel Hill, is responsible for finding the best resources with which to integrate cutting-edge financial research, innovative teaching material, and real-time data feeds. His goal is to provide students with access to the same financial data and information technology used on Wall Street. One of his main challenges has been to find a provider who can aggregate all the necessary data to analyze companies in a single easy-to-use interface. Mr. Britton doesn’t want students to feel held back by the complexities of a software application. He would rather that they concentrate on their analysis—not on searching for data or having to frequently switch between multiple interfaces.

SOLUTION

UNC has been a FactSet client since 2004 and Mr. Britton notes that students benefit from a “better collection of data [and an] easier interface to collect it [in].” UNC students are heavy users of the FactSet-Excel Link, which lets them integrate and dynamically update financial data within familiar Microsoft Office applications. At this time, FactSet is the only tool with PowerPoint integration which lets the students quickly reference and update both qualitative and quantitative data on various companies.

While FactSet is used in various classes, the 75 students (about 35 MBA students and 40 undergrad BSBA students) within the Applied Investment Management courses take significant advantage of the application to perform thorough company analysis on the holdings in their fund. They can then make an informed decision on the inclusion and weight of these holdings to the fund.

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RESULT

FactSet has changed the way the students learn at UNC by giving them the “ability to look at more data to make a decision,” explains Mr. Britton “Higher thinking [can be achieved] with data that is easily accessible, so time is not wasted just trying to find data.” The focus on analysis, rather than collection, has proved beneficial for students and professors alike.