QuickStart
Your guide to using FactSet
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Understanding Your Workspace

A workspace is made up of several tabs and subtabs and is completely customizable, allowing you to view only the components that best fit into your investment process workflow. When you first launch the new FactSet, you will see either a predefined workspace or your last saved default workspace for Marquee users. Workspaces are stored online so you can access them from multiple locations and share your workspace with individuals at your firm. For a guided tour of the platform, launch the eLearning course on Online Assistant page 15853.

Enter an identifier in FactSearch to quickly search for and navigate to securities, reports, and applications within the new FactSet.

You can access additional tab options by going to the Tab drop-down menu.

Selections include:

- **Open Tab** to open a tab saved in your Personal, Client, Super_Client, or FactSet directory.
- **Export Tab** to create a copy of the current tab and share it with other individuals at your firm.
- **Rename Tab** to change the name of the current tab.
- **Close Tab** to close the current tab and remove it from your workspace.
- **Print Tab** to print the current tab.
- **Revert Tab** to revert to the last saved version of the current tab.
- **Add Sub Tab** to create a new level of tabs under your current tab.

To open a blank tab and add new components to your workspace, click the **Plus** button next to the last tab.

You can add up to three levels of tabs in each workspace.

You can lock components in a certain position or press **ALT+C** to move the component, view the title bar, and access additional options (shown here).

FactSet allows you to send and receive identifiers from and to multiple components throughout your workspace using Identifier Broadcast and channel options. See Online Assistant page 15855 for more information on Identifier Broadcast options.
Customizing Your Workspace

In addition to the workspace options shown on the previous page, you can customize your workspace to include additional displays, reports, and applications. You can then save your new workspace and access additional workspace options using the new FactSet.

Inserting Components in Your Workspace

Click the **Plus** button next to the tab where you want to create a new tab and insert a new component:

Launch a component by going to the FactSet Insert menu and selecting the desired display, report, or application. If you’re using a predefined workspace, you can also click an icon in the toolbar to launch the corresponding component.

Follow the same steps to include additional components in your workspace. Once you’re done customizing your workspace, learn how to save it for future use in the next section.

Managing Your Workspace

To manage workspaces, go to FactSet Insert menu > Workspace and select:

- **New Workspace** to create a new workspace.
- **Open Workspace** to open an existing workspace file. You can also open a workspace that you’ve launched recently by going to FactSet Insert menu > Recent Workspaces and selecting it from the list.
- **Save Workspace** to save revisions to the current workspace.
- **Save Workspace As** to save a collection of tabs and subtabs as a single workspace file using a new name.
- **Import** to import a previously saved Marquee workspace or worksheet that is not already included in your list of workspaces. Browse for any approved upload file with extensions .MQS and .MQW.
- **Manage** to manage your workspace (e.g., move, copy, delete) using File Manager. See Online Assistant page 14277 for more information on File Manager.
Using Shortcuts and Function Keys

There are several predefined keyboard shortcuts available in the new FactSet default workspaces. You can also customize the FactSet right-click menu, toolbar, and/or hot keys by assigning shortcuts to your favorite displays, reports, and applications using Shortcut Manager.

Customizing Shortcuts and Hot Keys

To begin customizing your shortcut toolbar and right-click options, click the Shortcut Manager button on the toolbar or right-click within a tab and select “Manage Shortcuts.” Then, follow the steps below to add your new shortcut.

1. Select the component(s) you want to assign a shortcut to from the Available Items list. The list follows the same order as the FactSet Insert menu so you can easily find each item.

2. Click the Add button to include the highlighted component in the Selected Items list.

3. Click the Properties button to assign a function key and format the appearance of the shortcut in the toolbar.

Tip: You can also categorize your shortcuts so they appear grouped in your right-click menu.

Using FactSet Keyboard Shortcuts:

+ To hide/show the identifier toolbar, press ALT+A.
+ To hide/show scroll bars, press ALT+B.
+ To hide/show a component’s title bar, press ALT+C.
+ To activate the FactSet Insert menu, press ALT+F.
+ To find text within a component, press CTRL+F.
+ To tile components horizontally within a tab, press CTRL+SHIFT+ALT+H.
+ To tile components vertically within a tab, press CTRL+SHIFT+ALT+V.
+ To activate channel audit, press ALT+I.
+ To add a new tab/subtab, press CTRL+N.
+ To open a tab, press CTRL+O.
+ To revert back to the last saved version of a tab, press CTRL+R or the ~ key.
+ To save a workspace and document (i.e., settings), press CTRL+S.
+ To activate FactSearch or the Master Identifier box, press CTRL+T.
+ To select the next component in a tab, press CTRL+TAB.
+ To select the previous component in a tab, press CTRL+SHIFT+TAB.
+ To navigate to the lowest tab layer, press ALT+[1-9].
+ To toggle up/down through the tab layers, press CTRL+Up Arrow or Down Arrow.
+ To move the cursor left in a tab layer, press CTRL+Left Arrow or Page Up.
+ To move the cursor right in a tab layer, press CTRL+Right Arrow or Page Down.
+ To close the active component, press CTRL+F4.

Where can I find this on FactSet?

Shortcut Manager button support@factset.com

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FactSearch allows you to quickly search for and navigate to securities, indices, people, and FactSet components/reports. For a guided tour on using FactSearch, launch the eLearning demo on Online Assistant page 16253.

**Note:** FactSearch requires FactSet version 2010.1 or higher.

The drop-down menu is separated into the following sections:

+ **Entities** - Includes security types such as equities, indices, people, mutual funds, and private companies
+ **Components** - Includes all the components found in the FactSet Insert menu
+ **Series & Reports** - Includes economic charts and series that are available in Economic Analysis Charting
+ **Search OA** - Opens an Online Assistant search page with a list of help pages that include your keyword

Enter keywords into the FactSearch box. As you type, the FactSearch drop-down menu will populate with results related to the search keywords.

Expand the context-sensitive side menus to open a component with the selected entity’s information. Select “Broadcast ID” to send the entity to multiple components.

**FactSearch Keyboard Shortcuts**

You can quickly “jump” to a component by entering shortcuts into the FactSearch box. FactSearch shortcuts are written as: *identifier + @ + component shortcode*. You can launch a blank component by removing the identifier from the shortcut. *See Online Assistant page 16233 for a list of component shortcodes.*

**Shortcut Examples:**

+ C@N - News for Citigroup
+ FDS@C - Price chart for FactSet
+ @PA - Blank Portfolio Analysis component
The Learning component provides a central location to access FactSet’s interactive eLearning demonstrations and tools, including the Financial Analysis Knowledge Base. The Knowledge Base is a self-paced online training program and learning resource that concentrates on improving financial analysis and modeling in Excel. The Learning component also features several eLearning demos that allow you to explore FactSet at your own pace.

Starting with the basics of Excel, accounting, and finance, and continuing on to advanced model-building, the Financial Analysis Knowledge Base is an ideal continuing education program for corporate finance analysis.

Access eLearning demos covering various FactSet products and tools.

Click the ? button and select "eLearning" to launch context-sensitive demos for various displays, applications, and reports throughout your workspace (requires FactSet version 2010.1).

Navigate through the tabs to view lessons, a glossary, a subject index, and more. Self-paced online courses include interactive screenshots and video clips.

View tips & tricks on using FactSet's Productivity Suite to streamline your daily workflow.

Where can I find this on FactSet?
FactSet Insert menu > Additional Displays > Learning Tools > Learning

support@factset.com
Monitoring Market Data

Monitor market data for securities, such as companies, indices, treasuries, currencies, futures, and commodities in the Market Watch display. You can manually enter identifiers and save them as a ticker list or open an existing ticker list to better manage your display. For more information on managing identifiers in Market Watch, see Online Assistant page 15884.

Click the Lookup button to select an identifier or type an identifier directly into the desired location.

Right-click an identifier and select a report or market data display from the customized list to open and dynamically apply the identifier.

Double-click the N icon to view news for the identifier in the News display.

Double-click an identifier to apply the identifier to all the company-specific displays in the tab.

Select a row and enter G:group_name to create group headings for your securities.

Market Watch Hot Keys:

- To move around a Market Watch, press **Left** and **Right arrow keys**.
- To copy an identifier(s), press **CTRL+C**.
- To cut an identifier(s), press **CTRL+X**.
- To paste an identifier(s), press **CTRL+V**.
- To select multiple identifiers, press **CTRL** or **SHIFT**.

Tip: To create and manage real-time alerts that will notify you if certain criteria are met for a single or multiple identifiers, use the Alert Manager utility. For more information about Alert Manager, see Online Assistant page 15873.
Viewing a Full Quote

View a summary of a security's trades, including bids and asks, along with fundamental data, such as EPS, P/E, and Price to Book Value in the customizable Full Quote display. You can also view a ticker tape of the latest trade details and a candlestick chart of the intra-day performance.

Customize the Full Quote display using data from your FactSet subscription or your firm's proprietary data and research. For more information on customizing a Full Quote, contact FactSet Consulting Services.

Access key reports, such as Performance Quote or Ownership, via the drop-down menu on the Full Quote toolbar.

View a ticker tape and candlestick chart of the intra-day performance. If you do not see the ticker tape, right-click in the display and select “Show Ticker Tape.”
The Price Summary report displays price and return, splits, dividends, volume and volatility statistics, and related equities. Choose from several links within the report for more in-depth analysis. The Price History report displays historical price and return data for a single security or multiple securities.
Displaying Real-Time News

In the News display, you can view real-time scrolling financial news headlines for the current day, a specific company, and a portfolio or watch list via a customized filter.

- Search for news by entering a keyword or category code, or by clicking the Category Lookup button to use predefined news searches by subject, industry, language, country, and region.
- Click New Search to create a news search with your choice of data sources, categories or subjects, universe of securities, and date range.
- Click Top to quickly see the top news from Dow Jones News Service.
- Click Include or Exclude to add or remove items from your news search. Each included/excluded selection will appear in the Current Search/Filter Criteria list.
- Click Save Alert to save your search, create an alert, and choose a notification type.
- Enter an identifier to view all news for a single company.
- Select a predefined filter to narrow down stories.
- Double-click a headline to view the full news document.
- You can break out tabs by portfolio, security, or by the results of a custom news search. Right-click on the tab to move, rename, or delete it.

Organize your search criteria using these tabs:
- **Source** - To select from the available news sources (according to your subscription)
- **Category** - To select from a list of categories
- **Universe** - To specify an identifier or portfolio
- **Text** - To enter text criteria
- **Date/Time** - To specify a date range

Where can I find this on FactSet?
FactSet Insert menu > News & Research > News

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Online Assistant Page ID 15863

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Use RSS Reader to gather and view headlines from multiple websites in a single application. RSS Reader includes default feeds from the Financial Times, Forbes, and Dow Jones. In addition, you can add RSS feeds from your favorite sites.

Enter a keyword in the Search textbox and click the Search button.

Right-click on a feed name and select “Export” to export the feed to an OPML file that other RSS readers can use.

Right-click on a feed name and select “Mark all stories in this feed/folder as read” to mark all stories as read.

Right-click on a feed name and select “Delete” to delete the feed.

Click the Import button to import feeds from other RSS readers.

Click the Add Feed button to add a feed from your favorite website.

Click the Add Group button to organize your feeds into groups.

Click the Settings button to specify how headlines should appear and how much history to display.

Double-click a headline to view the story.

Where can I find this on FactSet?
FactSet Insert menu > News & Research > RSS Reader
Use the Investment Research display to access research reports from FactSet Research Connect, Reuters Research, and First Call Research Direct. This display allows you to search and view research reports all within one window.

Search for research reports by identifier, keyword, dates, broker/analyst, subject, industry, and/or common report type.

Click the **Additional Search Options** button to select additional search criteria, such as geography, report focus, and report actions.

Double-click a headline to view the report.

Select a report(s) and click the **Print** button to print the report(s) or click the **Download** button to download the report(s) locally on your PC.

Use the Source drop-down menu to change the source. You can access reports from one source at a time.

Once you’ve specified all of your search parameters, click the **Search** button to view your results.
The Create Note/Idea/Meetings dialog box allows you to create internal research notes, trade ideas, and meetings in a single location, streamlining the process of creating and communicating ideas. To access the full suite of Research Management tools, go to FactSet Insert menu > Research Management.

Use the Internal Note tab (as shown) to create notes on a company, industry, sector, or market and share them with other FactSet users at your firm. For more information on creating internal notes, see Online Assistant page 13293.

Classify your Internal Research Note with a subject, sentiment, and/or recommendation.

Enter your note details.

Click the Attach button to attach supporting documents and models.

Use the Trade Idea tab to create an idea and initiate performance tracking of the idea. The Trade Ideas tool helps to evaluate who is contributing the best performing idea recommendations. For more information on creating ideas, see Online Assistant page 15003.

Use the Meetings tab to create new meetings. The Meetings tool lets you keep a record of who attended meetings and the broker who set up the company meetings, as well as perform a subjective internal assessment of meetings. For more information on creating meetings, see Online Assistant page 16055.

Add custom fields to your Internal Research Note using manually entered data, FactSet formulas, or predefined lists. For more information on adding custom fields, see Online Assistant page 14358.

Add related symbols to your note by entering the identifier or searching for it using Identifier Lookup.
Accessing the Buy-Side Public Company Snapshot

The Public Company Snapshot - IM report provides a summary of a company’s business and financial data for buy-side professionals. This report includes an in-depth view of a company’s price, performance, growth, valuation, estimates, and more.

Enter a company name or identifier. You can also click the Lookup button to search for identifiers.

Click the “Previous” or “Next” links to change the fiscal quarter or year.

Right-click the price chart to change formatting, add custom annotations, and more.

View basic information including ticker, exchange, sources used, price, price change, and more at the top of the report.

View key statistics, such as enterprise value and analyst coverage for your selected company.

Scroll up/down the report to view more information.

Where can I find this on FactSet?
FactSet Insert menu > Company > Overviews > Public Company Snapshot - IM

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The Public Company Snapshot - IB report provides a summary of a company's business and financial data for sell-side professionals. This report contains valuations, ratios, and relevant data, such as takeover defense, business segment sales, M&A deals, key comps, insiders/stakeholders, and more. The Snapshot report serves as a launching point to other datasets and reports.

Click the "Build TravelBook" link to create a presentation-ready company overview.

Click the "Build PIB" link to customize a Public Information Book.

Click the link to toggle between Market Value and Equity Value. See Online Assistant pages 14561 and 14405 for breakdowns of the Market Value and Equity Value calculations.

Scroll to view additional information, including the company's relative defense protection by looking at the Bullet Proof Rating. (The Bullet Proof Rating is a scale from 1-10, where 10 is the highest level of takeover defense.)

Where can I find this on FactSet?
FactSet Insert menu > Company > Overviews > Public Company Snapshot - IB
Use the Private Company Snapshot report to research private companies. The Snapshot report combines summary information from the major data sources available on FactSet, including a financial summary, management and board details, recent headlines for the company, and more.

View key financial items to help you understand the financial situation of a company. EDGAR data is available for private companies that file with the SEC.

Click the Relationships icon to launch an individual’s Relationships report. For more information, see Online Assistant page 13501.

Displays “Active” if the investor is still invested in the portfolio company and “Exited” if the investor is no longer in the portfolio company.

Scroll down to view detailed investment information for the firm, including investment rounds. (A venture capital backed investment round is the amount of money raised in a particular round of financing.)
Accessing Private Equity/Venture Capital Data

Use the Private Equity/Venture Capital report to research descriptive investment information for private equity and venture capital firms, such as funds under management, active portfolio companies, and more.

Enter a firm’s name or identifier, or click the Lookup button to search for firms.

View the different report sections to see the firm’s active portfolio investments, active private equity investments, venture capital investments, latest M&A deals, and more.

Click the + icon to view more detailed information about an individual firm.

View all private equity/venture capital investments.

Click the Detail icon to view deal details.

Scroll down the report to view funds under management, industry focus, key people, and more.

Where can I find this on FactSet?
FactSet Insert menu > Private Equity/Venture Capital

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View a variety of quarterly and annual estimate data in the Estimate Summary report, including EPS and Sales estimate history, historical and estimated growth, surprise history, current outlooks for various estimate types, charts, and key items. The Broker Outlook report provides an overview of broker research and information through an interactive chart with broker estimates, consensus and pricing history, and data containing broker information, estimates, guidance, and more.

Choose the type of estimates to display from the Estimate Items drop-down menu.

Hover over a chart series to view the underlying data.

Click the recommendation link to view detailed, broker-level recommendations.

Click the "Prev" or "Next" links to view past or future time periods.

Click the analyst name links to view the Analyst Coverage report, which allows you to see all the companies that a particular analyst currently covers.

Click the Brokers button to include/exclude brokers in your report. Also, click the Settings button to access further options, such as setting the estimate window.

Click the Currency button to access currency and exchange rate selection options.
You can research and audit company financial statements for a given identifier. The following report highlights the Income Statement, but you can access additional financial reports, including Key Items, Balance Sheet, Cash Flow Statement, Segments, Ratios, and Pension in the Financials section.

### Income Statement

<table>
<thead>
<tr>
<th>Period</th>
<th>31-Mar-09</th>
<th>31-Mar-08</th>
<th>31-Mar-07</th>
<th>31-Mar-06</th>
<th>31-Mar-05</th>
<th>31-Mar-04</th>
<th>31-Mar-03</th>
<th>31-Mar-02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Sales</td>
<td>$20,529,6</td>
<td>$23,289,2</td>
<td>$23,984,1</td>
<td>$21,036,9</td>
<td>$18,591,5</td>
<td>$17,294,8</td>
<td>$16,056,4</td>
<td>$15,562</td>
</tr>
<tr>
<td>Cost of Revenue</td>
<td>3,681,4</td>
<td>3,424,2</td>
<td>3,890,2</td>
<td>3,587,5</td>
<td>3,174,6</td>
<td>3,162</td>
<td>3,006,5</td>
<td>3,083</td>
</tr>
</tbody>
</table>

**Select the period and data type from the corresponding drop-down menus.**

**Select a predefined date range or click the Custom Date Range button to view data over a specific period.**

**Select your preferred currency from the Currency drop-down menu.**

Using the FactSet Fundamentals database, you can hover your cursor over data items to access a breakdown of the as-reported numbers. Click on the hyperlink to be directed to the filing. See Online Assistant page 15775 for more information.

### To chart data, highlight the financial line item and click the Chart button. To chart multiple line items, press the CTRL key and highlight the desired rows.

### Where can I find this on FactSet?

FactSet Insert menu > Company > Financials > Income Statement
The Comps reports provide detailed information about comparable companies for your target company, including key financials, margins, and price performance. Each report lists specific metrics, allowing for a detailed side-by-side analysis. You can also save your custom lists of comparables for future use.

Where can I find this on FactSet?
FactSet Insert menu > Company > Comps > Selected Financials

Online Assistant Page ID 13999

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Viewing Company Filings

Use the Filings report to analyze both U.S. and non-U.S. companies’ documents from EDGAR, SEDAR, PDF annual reports, and GlobalFilings.com.

Quickly view recent popular filings using the links at the top of the report.

To view the Blackline report, click the Launch Blackline Report icon next to the corresponding filing.

View a comparison of a company’s 10-K or 10-Q filing to the previous period’s filing in the Blackline report. For more information on the Blackline report, see Online Assistant page 14370.

Click the Print button to print a complete filing or sections of a filing, as well as multiple filings in a batch print.

Click the Filings Wizard button to download as-reported financials into Microsoft Excel.

Perform advanced searches, filtering documents by date, filing type, and text string.

Where can I find this on FactSet?
FactSet Insert menu > Company > Filings > Filings

support@factset.com
FactSet Global Filings offers full text, clause, and field searching on debt, equity, and warrant prospectuses; programs, pricing supplements, and M&A transactions. For a guided tour of the Global Filings application, launch the eLearning course on Online Assistant page 15135.

Click **Open** to view your last 10 searches, your saved searches, and example searches.

To refresh your search criteria, click the **Clear All** button. You may also click the ✗ icon to delete specific criteria.

Select two check boxes to compare the clauses and term sheets, or select multiple check boxes to view several clauses.

Select check boxes and click the **Add to List** button to add documents to the workspace below. Click the **Document List** button to view an aggregated list of documents that you have selected in all of your searches.

Click the **Run Search** button to see the results of your search criteria.

Click the **Help** button to access application help for Global Filings.
View global merger and acquisition data, deal details, and private placements in the M&A Summary report. Track detailed information on a company’s latest deal activity including announce date, deal value, and advisors.

Review deal activity by price and volume for the last 12 months. Right-click on the chart to format or copy the chart. To view details, hover your cursor over the red and green flags.

The M&A Summary provides an overview of LTM deal activity sourced from FactSet Mergerstat.

Click the “Build M&A TravelBook” link to create a presentation-ready, printable report on a company’s M&A deal activity.

Click the Detail Link icon to view the deal synopsis, transaction notes, and financials for the target and buyer.

Click the Source Link icon to view source information for the deal, such as press releases or company filings.
FactSet Mergers includes both MergerStat and MergerMetrics. You can view pre-formatted reports, or create your own columnar reports to view advisors, premiums, and transactions. For a guided tour of the MergerMetrics application, launch the eLearning course on Online Assistant page 15584.

Choose the MergerMetrics tab to find information about acquisitions of public or private U.S. companies where a definitive merger agreement was filed with the SEC.

Choose the MergerStat tab to view detailed information on publicly-announced mergers, acquisitions, and divestitures involving public and private companies.

Once you execute a search, view your results in the Results tab.

In both the MergerMetrics and MergerStat tabs, you can search for deals by hundreds of searchable items.

Tip: You can also view the All Transaction as Buyer and All Transaction as Seller reports within FactSet Insert menu > Company > M&A. See Online Assistant page 14349 for more information on these reports.
SharkRepellent provides takeover defense data and corporate governance research. Using SharkRepellent, you can find information from a company’s articles of incorporation, bylaws, shareholder rights plan, and state takeover law to build a comprehensive overview of a company’s key takeover defenses.

The “Bullet Proof Rating” is based on a scale from 1-10. Ten is the highest level of takeover defense, and one is the lowest.

Search for defense profiles and analytics on a wide range of corporate governance criteria.

Click on a link to drill down to company-specific reports, filings, and documents.

Where can I find this on FactSet?
FactSet Insert menu > Company > Corporate Governance > Corporate Governance (SharkRepellent.net)
Fixed Income Explorer 3.0 allows you to perform bond valuations, scenario analysis, and other analytics on an extensive global universe of debt securities. Use the Security Overview report to access information on the terms and conditions and derived values for your fixed income security.

Enter a security identifier or click the Lookup button to select and view specific bond details.

Select the Issuer Overview report to access debt information for any issuer of debt. See Online Assistant page 15685 for more information.

View a comprehensive overview of the selected issue, including descriptive offering details, original offering of the security, and other information such as credit rating and maturity date.

View the redemptions options of a security. Access additional information by clicking the links in blue (e.g., Call Schedule).

View price, yield, convexity, duration, and spread for the issue in the Prices and Derived Values section.

View the charts in the bottom pane by clicking the Chart button next to the value you want to chart.

See all additional information, including charts, on the lower pane of the screen.
The Debt Capital Structure (DCS) Overview report provides a broad and comprehensive view of the instruments associated with a debt issuer. It includes current credit ratings, current credit spreads, price history, historical credit analysis, debt capital structure summary, and data for long-term debt by maturity and debt seniority.

View current credit ratings.
Click the credit rating link (e.g., Aa2) for detailed long-term rating history for the issuer and related issuer ratings.

Hover your mouse over the Price History chart to view the one-year and five-year CDS points, as well as the equity price of the issuer.

View historical credit analysis in order to evaluate the credit worthiness of a corporation. Scroll down the report and click the source links to be directed to the issuer’s 10-K.

View the debt capital structure broken down by class, including amounts available under revolving credit facilities, as well as current short-term debt information.

Track a company’s debt maturity schedule and view a year-by-year summary of when the bonds will mature.

Track long-term seniority and view the dollar value of debt at each level of seniority.

Where can I find this on FactSet?
FactSet Insert menu > Company > Debt > DCS Overview
The FactSet LionShares Global Ownership database collects global equity ownership data for institutions, mutual fund portfolios, and insiders/stakeholders. FactSet provides both summary and detailed ownership data that you can view by security or by holder. The Summary/Detail report shown here provides a summary of a company’s shareholder information.

Profile Builder lets you create quick one-page institutional profiles.

Create watchlists to track individuals and investors.

Select a report type. Choose from institutional, mutual fund, beneficial, insider/stake, and institutional/insider ownership.

Click on (or mouse over) any linked item to access more detailed information. Easily refocus your report on a specific holder or mutual fund.

Where can I find this on FactSet?
FactSet Insert menu > Company > Ownership > Company tab > Summary/Detail report
You can create detailed ownership reports, including peer analysis (shown below), projected ownership in a hypothetical merger, and detailed historical analysis. Peer Analysis allows you to create a list of companies and compare ownership among them.

Download any report into a Microsoft Excel spreadsheet.

Analyse ownership in a hypothetical merger using deal terms that you specify.

Historical Analysis reports include contact names, addresses, phone numbers, and e-mail addresses.

Tip: Launch the eLearning course on Online Assistant page 14740 to view a guided tour of these reports.

Compare institutional or mutual fund ownership of multiple companies side-by-side in a single report.
The Event Calendar - Company report displays historical and upcoming events such as earnings releases, stock splits, dividends, analyst meetings, guidance, and sales calls. You can download events and set preferences to receive e-mail alerts for upcoming events.

To find events for a specific company, enter a ticker or name in the Identifier Lookup input box. To search for companies, portfolios, or indices, click the Lookup button.

The interactive calendar allows you to narrow your search by date. Click the Single Arrow buttons to change date by month; click the Double Arrow buttons to change by year.

Enter a specific date in the Choose Date input box and click the Go button.

From the left pane, select the appropriate check boxes to limit your results. You can limit by event type, region, and industry.

Click the Settings button to select your preferred file format, calendar notification options, and time zone.

To download a transcript for an event, click the appropriate icon for the type of transcript you want to download.

Select the event from the Event column; event details appear in the right pane.
Viewing the People Reports

Research directors’ and officers’ relationships and backgrounds using the People Snapshot report. View information such as employment history, what other boards a person sits on, and who else they know, so you can make connections.

Click the **Lookup** button to find an individual, or start typing a name and possible matches will pop up.

Click the + or - buttons to expand and collapse report sections.

Launch the Relationships report to view business, charitable, educational, and other non-corporate relationships of the targeted investment professional.

Launch the Connections report to plot paths between people and firms. You can rank by relevance.

Scroll down the report to view compensation and options history (for Reuters Fundamentals subscribers).

Where can I find this on FactSet?
FactSet Insert menu > People > Snapshot