

FACTSET INTRODUCTION TRAINING



MAASTRICHT UNIVERSITY

Mathijs Hitzerd

Consulting Director

Tessa Hagelen

Consultant

Milica Gostiljac

Consultant

Agenda

- FactSet as a company
- Workstation training
- How to get data in Excel
- Quiz & Questions

OUR STORY

FactSet creates flexible, open data and software solutions for tens of thousands of investment professionals around the world, providing instant anytime, anywhere access to financial data and analytics that investors use to make crucial decisions.

For over 40 years, through market changes and technological progress, our focus has always been to provide **exceptional client service**. From more than **48 offices in 22 countries**, we're all working together toward the goal of creating value for our clients, and we're proud that 95% of asset managers who use FactSet continue to use FactSet, year after year.



OUR LOCATIONS

95%

CLIENT RETENTION

133K

USERS

10K

EMPLOYEES

22

COUNTRIES

40

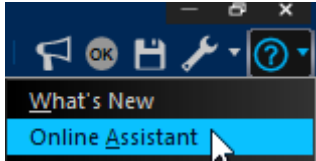
YEARS OF GROWTH


Data Included

- Bonds and Loans http://www.factset.com/data/company_data/Bonds_Loans
- Corporate Activism http://www.factset.com/data/company_data/corporate_activism
- Corporate Governance http://www.factset.com/data/company_data/corporate_governance_data
- Debt Capital Structure http://www.factset.com/data/company_data/debt_capital_structure
- Economics http://www.factset.com/data/market_data/factseteconomics
- Estimates http://www.factset.com/data/company_data/estimates
- Events and Transcripts http://www.factset.com/data/company_data/events_transcripts
- Filings http://www.factset.com/data/company_data/filings
- Financial Entities http://www.factset.com/data/company_data/entities
- Fundamentals http://www.factset.com/data/company_data/fundamentals
- Geographic Revenue Exposure http://www.factset.com/data/company_data/geo_revenue
- Market Aggregates http://www.factset.com/data/market_data/fma
- Mergers and Acquisitions http://www.factset.com/data/company_data/mergers_acq
- MSCI ESG <https://www.factset.com/solutions/business-needs/esg-solutions>
- Mutual Funds http://www.factset.com/data/company_data/mutualfunds
- Ownership http://www.factset.com/data/company_data/ownership
- People http://www.factset.com/data/company_data/people
- Prices http://www.factset.com/data/market_data/prices
- Private Company http://www.factset.com/data/company_data/privatecompany
- Private Equity http://www.factset.com/data/company_data/privateequity
- Private Placement http://www.factset.com/data/company_data/private_placements
- Proxy Voting http://www.factset.com/data/company_data/proxy_voting
- Public Equity Offerings http://www.factset.com/data/company_data/ipo
- Supply Chain Relationships http://www.factset.com/data/company_data/supply_chain
- StreetAccount http://www.factset.com/data/news_research/streetaccount

Resources

- For access see <https://library.maastrichtuniversity.nl/collections/databases/factset/>
- Request a FactSet account via https://advantage.factset.com/academic_idrequest
- <https://www.factset.com/download> to download the FactSet workstation
- <https://my.factset.com/> to access FactSet via Google Chrome
- FactSet Learning: <https://learning.factset.com>. Sign up by entering your name, university email address and chosen password.
- FactSet Online Assistant: [FactSet Online Assistant](#). Use Online Assistant to find help on FactSet products, learn about writing functions, view definitions to terms used throughout FactSet, and learn more about the various databases available.



- FactSet Support is available 24 hours a day, 7 days a week for application, project, and technical support.
 - In FactSet workstation, click the Contact FactSet Support button  or enter @HELP in FactSet Search.
 - In FactSet web, click the ? button in the web toolbar on the left, and then select "Chat with FactSet Support."
 - Netherlands +0800.228.8024
 - For general questions, email support@factset.com.

Quiz

1. What is the cause of the decrease of the Price of Joyy (YY-US) on the 18th of November 2020?
2. How often is “Gold” mentioned in the latest 10k of Tiffany? *Don't use stemming and Thesaurus.*
3. From which 3 countries does Heineken derive the most revenue?
4. What is the all-time High of the AEX and when was this?
5. How many brokers currently recommend to buy OR overweight Apple?

THANK YOU

› MAASTRICHT UNIVERSITY
Mathijs Hitzerd

- Feel free to connect with me via LinkedIn
- <https://www.factset.com/careers>