

WHAT IS FACTSET?

FactSet is a research database that monitors world market trends and provides extensive company and industry data, analytic tools, and data feeds. It is used by finance industry professionals around the world. FactSet has been licensed by the FLC and requires accounts and specialized software; it cannot be accessed through the public FactSet.com website.

OPTIONS FOR ACCESSING FACTSET REMOTELY

FactSet can be accessed online using one of two options:

- **FactSet Web:** This version is web-based is compatible with all devices. It offers access to all of the content and functionality available on FactSet Workstation. However, some portfolio analytics and the Excel plug-in are not included with FactSet Web.
- **FactSet Workstation:** This version is an installed version, meaning FactSet software must be downloaded directly on to a personal device. **This version is only compatible with Windows devices.** It offers all content and functionality, and includes the Excel plug-in.

DIGITAL + MARKETPLACE



FACTSET WEB

The native web version of the FactSet Workstation. Securely access FactSet from any browser on any machine.

Launch



FACTSET WORKSTATION

Personalized market data software for your PC or tablet, featuring real-time news and quotes, company and portfolio analysis, and rich commercial and proprietary content

Launch | Download



CONTENT MARKETPLACE

Best-in-class data and solutions for investment professionals

Launch

REQUESTING A FACTSET ACCOUNT

All versions of FactSet require an individual FactSet account. Current students with a valid University of Toronto email can request an account for remote use. Please allow 1-2 business days to receive a confirmation email from FactSet.

To request a FactSet account, email us at utm.lkcflc@utoronto.ca with the following information:

- First & Last Name
- U of T Email Address (@mail.utoronto.ca)
- Program (ex. Commerce, Finance, etc.)
- Program (ex. Commerce, Finance, etc.)
- Program (ex. Commerce, Finance, etc.)
- Expected Month and Year of Graduation (ex. June 2021)
- If you need FactSet Web or FactSet Workstation

NEED MORE HELP?

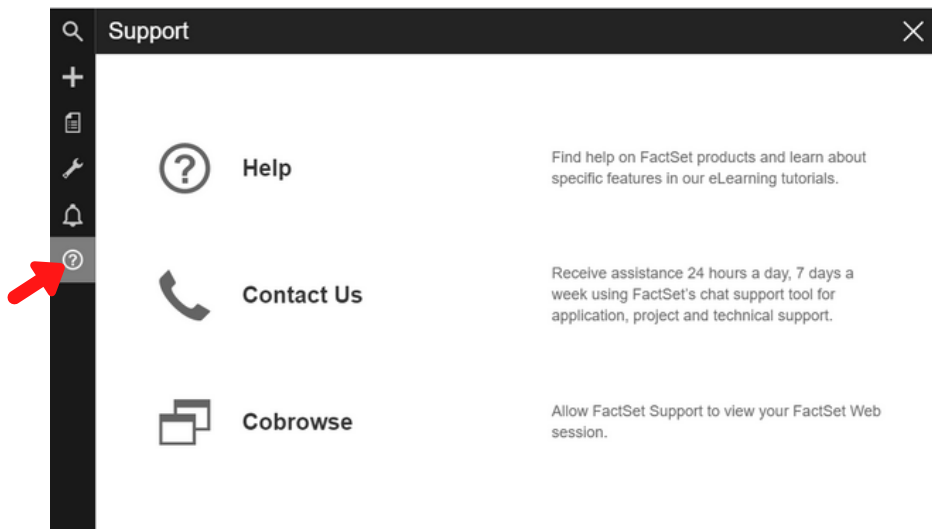
Factset offers extensive online and in-person help 24 hours a day, 7 days a week.

For context-sensitive help with an active screen or function, look for the blue '?' icon at the top right on FactSet Web, and the top left in FactSet Workstation, and select 'Online Assistant' from the pull down menu.



For more general help, and to access video tutorials and other help content, visit the FactSet Learning website at <https://learning.factset.com>. Access to the FactSet Learning website requires a separate account, which can be created by selecting 'Sign Up' on the home page.

For live help, look for the '?' icon and select 'Contact Us' from the pull-down menu to locate a toll-free 1-800 number and email address for FactSet's Support Desk.



WORKSHOPS

The FLC hosts the FLC Tools Workshop series, which include two FactSet-focused workshops: **FactSet Basics** and **FactSet Intermediate**. Attendees can earn 1 Management PSDP point AND 1 Library 101 certification credit for each workshop attended. Visit <https://library.utm.utoronto.ca/flc/workshops> to learn more and register.

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