



## FactSet and Smartplus Bring ESG to Retail Investors in Japan

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### Integration of FactSet ESG data will allow new ESG screening for portfolio construction in Smartplus' Wealth Wing platform for retail clients

NORWALK, Conn. and TOKYO, July 28, 2021 (GLOBE NEWSWIRE) -- [FactSet](#) ("FactSet" or the "Company") (NYSE:FDS) (NASDAQ:FDS), a global provider of integrated financial information, analytical applications, and industry-leading service, and [Smartplus](#), a leading Japanese wealth management and insurance platform, today announced the integration of FactSet's Truvalue Labs ESG content into Smartplus' platform for retail clients. This integration will help Smartplus become the first robo-advisor investment platform in Japan that allows individual investors to consider ESG factors when selecting stocks.

Smartplus, a member of Finatext Holdings, Ltd., started its investment management business in late 2020. It leveraged the fintech infrastructure the company provides to Japan's large financial institutions to build a digital investment management platform for retail customers. This platform, [Wealth Wing](#), was created to expand access to leading asset management services in Japan and the number of accounts has grown 30% per month since launch.

The integration of Truvalue Labs' real-time ESG data with Wealth Wing will allow retail investors to use ESG factors to screen for and exclude companies with low ESG scores, construct ESG-conscious portfolios, and see Truvalue Lab's ESG metrics for each stock within their portfolios.

"We are excited to announce our work with FactSet," said Ryota Hayashi, Director, Smartplus and CEO, Finatext Holdings. "We strongly believe in the importance of providing retail investors with the ability to access ESG investments in Japan. Integrating the ESG scores provided by FactSet's Truvalue Labs with our portfolio management strategy supports our mission of reinventing finance as a service."

"ESG is gaining momentum in Japan, especially among our institutional asset management clients, and we are excited to work with Smartplus to expand ESG access to retail investors," said Yumi Tanaka, Regional Director, FactSet Japan. "Sound data is an essential part of any successful investing strategy, and Smartplus' innovative approach to its growing investment platform will help bring better ESG metrics to more people in Japan."

#### About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) delivers superior content, analytics, and flexible technology to help more than 155,000 users see and seize opportunity sooner. We give investment professionals the edge to outperform with informed insights, workflow solutions across the portfolio lifecycle, and industry-leading support from dedicated specialists. We're proud to have been recognized with multiple awards for our analytical and data-driven solutions and repeatedly scored 100 by the [Human Rights Campaign@ Corporate Equality Index](#) for our LGBTQ+ inclusive policies and practices. Subscribe to our thought leadership blog to get fresh insight delivered daily at [insight.factset.com](#). Learn more at [www.factset.com](#) and follow us on Twitter: [www.twitter.com/factset](#).

#### About Finatext Holdings, Ltd.

Under the mission of "reinventing finance as a service", Finatext Holdings Inc. aims to realize "a world where finance is more closely connected to people's lives", which reviews the ideal state of financial services from the user's perspective and develops new financial services together with its partners; Nowcast, Inc. which provides alternative data analysis services; Smartplus, Inc. which provides a securities business platform; and next-generation a next-generation digital insurance company, and Smartplus Small-amount Short-term Insurance Co.

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