



ESG Asset Management Chooses FactSet as Preferred Vendor

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Swiss asset management firm integrates FactSet's Portfolio Analysis and Order Management System

NORWALK, Conn., and ZURICH, Switzerland, Feb. 15, 2022 (GLOBE NEWSWIRE) -- [FactSet](#) (NYSE:FDS) (NASDAQ:FDS), a global provider of integrated financial information, analytical applications, and industry-leading service, announced that Zurich-based asset manager [ESG Asset Management](#) has selected FactSet for its portfolio performance attribution platform and order management system (OMS).

A fixed-income house with a focus on environmental, social, and governance (ESG) investments, ESG-AM uses FactSet's Fixed Income Portfolio Analytics (FIPA) product and extensive ESG data to analyze and report performance attribution for its multi-currency portfolios. With FactSet's solutions, ESG-AM can easily create highly customized attribution reports across ESG and United Nations Sustainable Development Goals (UN SDGs) ratings, sectors, and geographies.

Another key component of the FactSet implementation at ESG-AM was the addition of FactSet's OMS, which allows the asset managers to simulate trades across multiple portfolios and perform pre-trade compliance checks.

"The combination of FactSet's powerful multi-asset-class portfolio analytics tools and best-in-class ESG data allows us to decompose interest and credit spread components of a portfolio and examine them from an ESG perspective," said Philipp Good, CEO of ESG-AM. "For us, working with a data and solutions provider that prioritizes client service was a must-have and a key deciding factor in our choice of vendor."

"With FactSet's fully integrated, cloud-hosted order management and compliance solution, ESG-AM can seamlessly manage its investment workflow and streamline tasks across portfolios," said Josch Zimmermann, VP, Regional Director for Austria, Germany, and Switzerland at FactSet. "In addition, thanks to FactSet's seamless integration of both proprietary and third-party ESG data sets, ESG-AM has gained access to a wide range of ESG data sets that can be easily incorporated into its fixed-income portfolio analysis."

About ESG-AM

Founded in 2021, the asset management company ESG-AM will focus on a concentrated range of products and services for sustainable investments, once its authorization as an asset manager becomes legally effective. Using its expertise in the field of corporate credit, ESG-AM invests not only in companies that are already sustainability champions, but equally in those companies with the greatest catch-up potential and those that have an explicit impact. While relying on industry partnerships for sourcing data, ESG-AM uses proprietary models and cutting-edge technology for in-house analysis. Based in Zurich, Switzerland, the company will address an institutional client base looking to ensure their portfolios demonstrate measurable sustainable attributes and requiring bespoke, specialized investment solutions to achieve this

For more information, please visit esg-am.com.

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) delivers superior content, analytics, and flexible technology to help more than 162,000 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, with the distinction of having been recently added to the S&P 500, 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.

FactSet ☐

Investor Relations Contact:

Kendra Brown

+1.203.810.2684 ☐

kbrown@factset.com

Media Contact:

Lisa Knoll

+1.203.810.1327 ☐

lknoll@factset.com

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