



FactSet Launches AI-Powered Pitch Creator

January 15, 2025

Revolutionary pitchbook automation tool enhances productivity to save junior bankers hours each week

NORWALK, Conn., Jan. 15, 2025 (GLOBE NEWSWIRE) -- FactSet, a global financial digital platform and enterprise solutions provider, today announced the launch of Pitch Creator, a groundbreaking GenAI-powered solution designed to revolutionize pitchbook creation for investment banks. By automating the time-consuming tasks of model analysis and presentation building, FactSet Pitch Creator can reduce hours of manual work into minutes, creating the productivity gains necessary for junior bankers to prioritize high-impact strategic initiatives that drive new business opportunities.

Elements of Pitch Creator leverage [FactSet Mercury](#), the company's Gen AI-powered chatbot, to allow users to give directives, access templates, build slides, and surface auditable insights from structured and unstructured data using natural language prompts. Seamless integration with Microsoft Office enables junior bankers to efficiently compile, analyze, and source-link company research and market data, then transfer them directly into Excel models and PowerPoint presentations.

Key features of Pitch Creator include:

- 1. Search Intelligence:** Users can bypass manual and time-consuming search processes through Search Intelligence to empower research and information discoverability across FactSet's unstructured content. Through user-generated prompts, investment bankers can conduct semantic searches across FactSet's StreetAccount news, earnings call transcripts, and SEC filings to uncover topline themes and expedite idea generation that inform users' next best action.
- 2. Chart Creator:** Bankers can simply ask the FactSet Mercury chatbot to generate dynamic graphs and Excel charts for specific models and presentations, such as price to earnings and revenue by region, along with over 20 other chart types. Charts can be regenerated or updated with a simple query to change the ticker, symbol, frequency, time period, or chart type.
- 3. Slide Assistant & ReSlide Capabilities:** By inputting their firm name or ticker into Slide Assistant, bankers can quickly build branded slides within PowerPoint, allowing them to forego manually designing and formatting presentations. They can then reconfigure content types — such as business description, price volume charts, and summary financials — and repurpose them for new presentations or target companies using ReSlide, which refreshes content while maintaining original formatting. This content is seamlessly linked to a generated Excel backup.
- 4. Tombstone Generator:** Via FactSet screening or client-sourced transactions in Excel, junior bankers can quickly generate new tombstone slides for pitchbooks. Pitch Creator automates manual and repetitive tasks such as resizing, aligning, and formatting, allowing users to quickly review previous M&A deals and showcase topline data.
- 5. Template Assistant:** Users can query the chatbot using natural language prompts to retrieve over 200 pre-built Excel templates to power their modeling workflows.
- 6. Office Cloud Refresh:** Bankers can leverage FactSet's Excel add-in to securely offload model refresh tasks to FactSet servers on user demand or at a scheduled time, enabling them to continue their work in Excel.

"With junior bankers often working 80 to 100 hours each week, FactSet saw an opportunity to streamline workflows, drive efficiency, and improve work-life balance," said Kendra Brown, Senior Vice President and Senior Director of Banking and Sell-Side Research at FactSet. "Pitch Creator was designed to allow junior bankers to refocus their energy and attention on strategic functions that drive revenue by automating tasks like model building and presentation formatting."

"Pitch Creator combines FactSet's leading Microsoft Office productivity suite with our advanced AI to foster innovation, strategic thinking, and firm-wide efficiency for banks," said Kristy Karnovsky, Head of Dealmakers and Wealth at FactSet. "With the power of FactSet Pitch Creator, junior bankers can leverage source-linked data, while incorporating branded designs and refreshed layouts into their pitchbooks, empowering them to deliver high-impact presentations to clients."

Learn more about FactSet Pitch Creator and AI solutions for bankers here: <https://www.factset.com/marketplace/catalog/product/pitch-creator>

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) helps the financial community to see more, think bigger, and work better. Our digital platform and enterprise solutions deliver financial data, analytics, and open technology to more than 8,200 global clients, including over 218,000 individual users. Clients across the buy-side and sell-side, as well as wealth managers, private equity firms, and corporations, achieve more every day with our comprehensive and connected content, flexible next-generation workflow solutions, and client-centric specialized support. As a member of the S&P 500, we are committed to sustainable growth and have been recognized among the Best Places to Work in 2023 by Glassdoor as a Glassdoor Employees' Choice Award winner. Learn more at www.factset.com and follow us on [X](#) and [LinkedIn](#).

Investor Relations:

Yet He
+1212.973.5701
yet.he@factset.com

Media Relations:

Megan Kovach
+1.512.736.2795

Megan.kovach@factset.com

FACTSET