



FactSet's Portware and Jefferies First to Launch IntelligentCross JumpStart, Linking Buy-Side EMS and U.S.' Top ATS by Volumeⁱ

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IntelligentCross' JumpStart functionality is now available within FactSet's Portware EMS, empowering the buy-side to directly access brokers' low-touch (algo) liquidity

NORWALK, Conn., Sept. 25, 2025 (GLOBE NEWSWIRE) -- FactSet (NYSE: FDS | NASDAQ: FDS), a global financial digital platform and enterprise solutions provider, today announced the general availability of IntelligentCross' JumpStart functionality within FactSet's Portware execution management system (EMS), making FactSet the first among its competitor set to offer a direct integration from the buy-side. Portware users now have direct access to Jefferies' (NYSE: JEF) low-touch (algorithmic) liquidity.

This integration was made possible through FactSet's collaboration with IntelligentCross, the number one U.S. equities ATS by volumeⁱ—and Jefferies, one of the world's leading full-service investment banking and capital markets firms.

"We are proud to have collaborated with the creators of IntelligentCross, Jefferies, and longtime FactSet client Harris | Oakmark to bring this new functionality to FactSet's Portware EMS," said Rob Robie, Executive Vice President and Head of Institutional Buy Side at FactSet. "Institutional traders now have more efficient ways to locate high-quality liquidity without compromising on signaling risks. By embedding IntelligentCross JumpStart directly into our offering, we're giving buyside clients a powerful new tool to trade smarter and with more confidence."

As equity trading becomes increasingly focused on meeting the needs of the buy-side through innovation, IntelligentCross ATS leverages artificial intelligence to enhance order matching and improve price stability in US equities, helping to minimize market impact and the risk of adverse selection.

IntelligentCross' new JumpStart technology, available via FactSet's Portware EMS, allows buy-side traders to directly choose, access, and interact with the liquidity they want with minimal information leakage. Their orders interact in purpose-built hosted environments on IntelligentCross ATS that connect their trading interest with orders being executed through specific agency brokers' algos. This model preserves confidentiality and prevents information leakage for both parties.

Longtime FactSet client Harris | Oakmark, a leading investment management firm known for its long-term and value-oriented approach to investing, played an important role in providing user insights and testing of this innovative workflow solution during the development process, and Harris | Oakmark's institutional investment professionals are the debut users of the new offering in full production.

"JumpStart is about solving real trading problems," said Jason Siegendorf, Senior Director, Head of Trading Analytics at Harris | Oakmark. "This isn't an incremental upgrade—it's a meaningful evolution in the kind of liquidity we can interact with. JumpStart lets us precisely decide how, when, and with whom our orders interact. To us, this is trading as it should be: efficient, deliberate, and fully aligned with our objectives on behalf of our clients and shareholders."

For more information about FactSet's Portware EMS, please visit <https://www.factset.com/marketplace/catalog/product/portware-factsets-enterprise-trading-solution>.

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) supercharges financial intelligence, offering enterprise data and information solutions that power our clients to maximize their potential. Our cutting-edge digital platform seamlessly integrates proprietary financial data, client datasets, third-party sources, and flexible technology to deliver tailored solutions across the buy-side, sell-side, wealth management, private equity, and corporate sectors. With over 47 years of expertise, a presence in 20 countries, and extensive multi-asset class coverage, we leverage advanced data connectivity alongside AI and next-generation tools to streamline workflows, drive productivity, and enable smarter, faster decision-making. Serving approximately 9,000 global clients and over 237,000 individual users, FactSet is a member of the S&P 500 dedicated to innovation and long-term client success. Learn more at www.factset.com and follow us on [X](#) and [LinkedIn](#).

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ⁱ IntelligentCross is the #1 U.S. ATS by volume according to FINRA's Weekly ATS Reports as of 08/18/2025

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