FACTSET

FactSet Deploys AI Beta to More Than 85K Users, Announces AI-Enabled Document Search Functionality to Transform Financial Productivity

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FactSet's most recent AI milestone highlights FactSet's rapid pace of innovation

NORWALK, Conn., March 26, 2026 (GLOBE NEWSWIRE) -- FactSet (NYSE:FDS | NASDAQ:FDS), a global financial digital platform and enterprise solutions provider, today announced a significant expansion of its artificial intelligence capabilities with the broad beta rollout of AI-enabled Document Search to over 85,000 users. This strategic upgrade is set to accelerate how financial professionals access and leverage insights from FactSet's extensive universe of unstructured data. Today's announcement continues FactSet's momentum of recent AI-driven progress, reinforcing its position as an innovation leader in the financial services sector.

"AI is fundamentally altering the financial landscape, and FactSet is proud to set the standard for trustworthy, impactful adoption," **said Kate Stepp, Chief AI Officer at FactSet**. "Our achievements highlight not only industry-leading advancements but also our steadfast commitment to providing compliant, auditable intelligence wherever our clients need it most."

FactSet's Recent AI Advancements
Document Search is FactSet's newest large-scale beta, following a series of recent AI innovations, including:

- Appointment of a Chief AI Officer.
- Integrations with both OpenAI's ChatGPT and Anthropic's Claude for direct natural language access to FactSet data and regulated workflows.
- Implementation of ComplyAdvantage's AI-driven financial crime risk tools for corporate bankers.
- Addition of AI document ingestion features for private capital managers utilizing Cobalt.

Each initiative propels FactSet toward a more unified, multi-interface platform, enabling clients to harness FactSet's intelligence layer—including LLM features and robust compliance safeguards—without compromising security or dependability

Document Search: Elevating Analyst Productivity
With the rollout of Document Search in beta, FactSet empowers users to explore and extract insights from industry-leading transcripts, earnings calls, news, filings, and other unstructured data while preserving FactSet's hallmark auditability and seamless integration.

Unlike manual processes or generalized tools, Document Search delivers rapid, source-linked results drawn exclusively from trusted sources, minimizing risk in environments where precision is essential. Its intuitive comparison grid benchmarks companies and timeframes, while a natural language AI agent provides instant Q&A and summarized insights to streamline research. The AI-curated homepage highlights priority topics for deeper analysis, enabling faster, more informed decision-making with synthesized, auditable insights.

The public beta began in January, and following strong initial feedback, the global release is scheduled for phased rollout through late spring 2026.

FactSet remains dedicated to continuous improvement and expanding cross-source analytical capabilities. This includes ongoing development to introduce secure, fully attributed broker research summaries—enhancing discoverability while safeguarding intellectual property.

For more information on Document Search and FactSet's AI innovations, visit: https://www.factset.com/ai.

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, offices in 19 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 more than 9,000 global clients and over 239,000 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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