



## FactSet Modernizes Valuation Workflows for Private Capital Markets in Partnership with Valutico

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*New integrated workflow enables more frequent, transparent, and scalable valuations*

NORWALK, Conn., May 12, 2026 (GLOBE NEWSWIRE) -- [FactSet](#), a global financial digital platform and enterprise solutions provider, today announced a partnership with [Valutico](#), a leading provider of valuation technology, to deliver an integrated, end-to-end valuation workflow for private capital markets.

The partnership addresses a growing challenge across the industry: as investor expectations shift toward more frequent and transparent valuations, existing workflows — often reliant on spreadsheets and manual data re-entry — are becoming increasingly difficult to scale. Firms are being asked to produce institutional-grade valuations on a monthly or even more frequent basis, without a corresponding evolution in infrastructure.

Through this partnership, FactSet brings together portfolio data, valuation modeling, and reporting into a single, connected workflow designed to meet this shift. Portfolio company financials collected in FactSet's Cobalt as part of portfolio monitoring flow directly into Valutico's purpose-built valuation platform, where analysts can access all income-, market- and asset-based methodologies including DCF, Trading Multiples, Transaction Multiples, Venture Capital Methods, LBO, and more. Once finalized, valuation outputs, including enterprise value, equity value, and waterfall calculations, are automatically returned and tracked alongside portfolio performance and reporting.

"We looked at a range of options and Valutico stood out because valuation isn't a feature for them, it's what they specialize in," said Emily Monaghan, Senior Vice President and Senior Director, Private Capital at FactSet. "That distinction matters here more than it might elsewhere because valuation is one of those challenges where a partial solution simply doesn't hold up at scale. The methodology, breadth, auditability, and consistency required across a growing portfolio of companies demands a purpose-built platform. Valutico brings that, and with FactSet's market data — public company financials, estimates, comps, and transaction multiples — natively integrated into the workflow, our clients get a complete solution that is unique in the market."

"For us, the right integration partner isn't just about data access. It's about where firms actually work," said Paul Resch, Co-Founder and CEO of Valutico, a former investment banker himself "Cobalt is the system of record for private capital portfolio management, and that's exactly where valuation needs to live. When valuation sits outside the investment workflow, you introduce inconsistency, version drift, and friction that only compounds as portfolios grow. Connecting directly to Cobalt eliminates that. Every valuation draws from the same data that drives monitoring and reporting, and every output flows back into that same record. We have had clients asking us for native FactSet data integration for some time now. This partnership means we can finally deliver that, and the result is a valuation workflow with no real equivalent in the market."

The workflow is anchored within FactSet's Cobalt platform, which serves as a centralized system of record for portfolio data, performance, and investor reporting. By extending that foundation into the valuation process, FactSet ensures that valuation inputs and outputs remain connected to the broader investment lifecycle, eliminating the data silos and manual re-entry that have long constrained private capital workflows.

Valutico's platform supports a wide range of valuation methodologies across income, market, and asset-based approaches, with integrated access to FactSet's market data, including comps, public company financials, estimates, and M&A transaction multiples. Analysts retain full control over assumptions, methodology selection, and adjustments while benefiting from a more efficient, consistent private capital workflow.

For more information, please visit [Cobalt Portfolio Monitoring Platform | AI-powered Portfolio Monitoring](#).

### 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 241,000 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](http://www.factset.com) and follow us on [X](#) and [LinkedIn](#).

### About Valutico

[Valutico](#) provides valuation and deal management software for financial professionals. Its platform helps advisory firms, investors, and corporate finance teams work more efficiently across valuation, analysis, and transaction workflows. With a focus on clarity, speed, and auditability, Valutico combines financial technology, data, and AI to support better decision-making in high-stakes

deals.

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The logo for FACTSET, featuring the word "FACTSET" in a bold, blue, sans-serif font. The letters are spaced out and have a slight shadow effect.