



FactSet Strengthens Insurance Sector Footprint as Curi Holdings Adopts Portfolio Analytics Suite

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As insurance companies face growing pressure to modernize investment operations, Curi Holdings' is leveraging FactSet's Portfolio Analytics Suite to strengthen decision-making and position for long-term growth

NORWALK, Conn., July 21, 2026 (GLOBE NEWSWIRE) -- FactSet, a leading global intelligence and AI solutions provider to the financial markets, is expanding its footprint across buy-side insurance firms following Curi Holdings (Curi) deployment of its portfolio analytics suite. The full-service advisory firm is adopting three core offerings: Whole Portfolio Analytics (FactSet's flagship tool for asset owners), FactSet Performance Solution, and Private Capital Data Aggregation Service.

Companies like Curi face a familiar set of structural challenges: disconnected systems, limited oversight of total portfolio impact, unforeseen risks, and fragmented analytics all contribute to operational inefficiencies, exposure to hidden risks, and suboptimal portfolio performance. Curi's adoption of FactSet's solution reflects the organization's strategic focus on building a more connected, data-driven investment infrastructure. By unifying analytics across public and private assets within FactSet's Portfolio Analytics Suite, Curi is positioning its investment team with deeper insights, enhanced risk visibility, and greater agility to support long-term growth objectives.

The adopted suite of FactSet's solutions addresses industry-wide challenges across three core areas:

- **Whole Portfolio Analytics** delivers a unified platform with timely, plan-wide portfolio and market intelligence across asset classes, enabling real-time visibility into exposures, performance and risk, benchmarking against investment policies, and consistent, data-driven stakeholder engagement, all in one system.
- **FactSet Performance Solution** provides industry-leading performance analytics and attribution across 10+ models, helping teams identify performance drivers and clearly communicate results to stakeholders.
- **Private Capital Data Aggregation Service** enables asset owners to outsource the collection and management of private fund data by extracting and validating Net Asset Values, cash flows, and portfolio metrics from unstructured General Partner documents, unlocking deeper insights across public and private assets for performance, risk, and total portfolio analysis.

"Curi's adoption of our unified portfolio analytics solutions suite is a testament to FactSet's growing presence in the asset owner space. As institutional investors face increasing pressure to consolidate their tech stack and gain a single view of their portfolios, we are uniquely positioned to deliver the tools they need, from whole portfolio analytics to private capital data management, all within one, integrated platform", says David Mellars, Head of Portfolio and Risk at FactSet.

"At Curi, we are continually evolving our capabilities to better serve our member-owners, clients, and long-term mission," said Ben Remke, Curi's Chief Financial Officer. "FactSet's portfolio analytics suite provides the integrated data and insights we need to make informed decisions, navigate an increasingly complex investment landscape, and continue building a resilient organization positioned for the future."

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) supercharges financial intelligence, offering enterprise data and information solutions that help our clients maximize their potential. Our digital platform seamlessly integrates proprietary data, third-party sources, and flexible technology to deliver tailored solutions across the buy side, sell side, wealth, and corporate sectors. With over 47 years of expertise, we leverage advanced data connectivity, AI, and next-generation tools to streamline workflows and enable smarter decision-making. As an S&P 500 company serving more than 9,100 global clients and over 247,000 individual users, we are dedicated to innovation and long-term client success.

Learn more at www.factset.com and follow us on [X](#) and [LinkedIn](#).

About Curi

Curi (curi.com) is a full-service advisory firm comprised of three distinct businesses: Curi Insurance, its flagship medical malpractice liability insurer; Curi Advisory, its dedicated healthcare performance and optimization vertical; and Curi Capital, a registered investment advisor. As fierce healthcare advocates, business leaders, and thoughtful partners, Curi offers unmatched access and exudes a deep understanding of specific client circumstances. With exceptional accessibility and dedication, Curi's trusted expertise, ability to form deep relationships, and holistic approach deliver outcomes that are proven, actionable, and meaningful—in medicine, business, and life.

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The logo for FactSet, featuring the word "FACTSET" in a bold, blue, sans-serif font.