



FactSet Announces Expanded Partnership with Scotia Wealth Management

October 8, 2026

NORWALK, Conn., Oct. 08, 2026 (GLOBE NEWSWIRE) -- FactSet (NYSE: FDS | NASDAQ: FDS), a leading global intelligence and AI solutions provider to the financial markets, today announced an expansion of its partnership with Scotia Wealth Management, part of the Scotiabank group of companies. The expansion will further integrate FactSet's capabilities into Scotia Wealth Management's advisor and investment platforms, supporting its commitment to enhancing the advisor experience and helping teams deliver greater value for clients.

Advisors, investment professionals, and support team members across Scotia Wealth Management, will have access to FactSet's unified research and intelligence platform, bringing together investment research, market data, portfolio analysis, watchlists, and other resources in one place.

"We're continually evolving our advisor platform to better support the needs of advisors and clients," said Todd Barnes, Executive Vice President, Canadian Wealth Management Investment Advisory, Scotia Wealth Management. "Our partnership with FactSet is an important part of that evolution, introducing powerful capabilities that position us to deliver even more value across our business over time."

"Scotia Wealth Management sets a high bar for how technology can enable advisors, and we are proud to meet it," said Goran Skoko, Chief Revenue Officer at FactSet. "This expansion reflects the strength of a partnership built on trust, performance, and a shared belief that advisors deserve the very best tools available. We look forward to continuing to deliver on that promise together."

This expanded initiative underscores FactSet's growing momentum as the platform of choice for wealth management firms seeking to equip their advisors with a decisive competitive edge, and reinforces Scotiabank's position as a firm that holds itself to the highest standard when it comes to the technology and tools it puts in the hands of its people.

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) supercharges financial intelligence, offering enterprise data and information solutions that help our clients 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 48 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 more than 9,200 global clients and over 260,000 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](#).

About Scotiabank

Scotiabank's vision is to be our clients' most trusted financial partner and deliver sustainable, profitable growth. Guided by our purpose: "for every future," we help our clients, their families and their communities achieve success through a broad range of advice, products, and services, including personal and commercial banking, wealth management and private banking, corporate and investment banking, and capital markets. With assets of approximately \$1.5 trillion (as at July 31, 2026), Scotiabank is one of the largest banks in North America by assets, and trades on the Toronto Stock Exchange (TSX: BNS) and New York Stock Exchange (NYSE: BNS). For more information, please visit <http://www.scotiabank.com> and follow us on X [@Scotiabank](#).

To learn more about Scotia Wealth Management, please visit:

www.scotiawealthmanagement.com

FactSet

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