

**2021**

**SUSTAINABILITY  
REPORT**

# STEWARDING THE FUTURE

Stewarding is the action of carefully and responsibly managing something. At FactSet, “Stewarding the Future” means nurturing our people, clients, stakeholders, and the environment to create a better tomorrow. This theme manifests itself throughout this report in the plans, goals, and measurable outcomes we have established based on current performance within our environmental, social, and governance impacts.

**FACTSET AT A GLANCE**

FactSet delivers open technology, connected data, and hyper-personalized workflow solutions to help the financial community identify their next best action.

**FOUNDED IN**  
**1978**

**10K+**  
Employees

**25+**  
**YEARS**  
Publicly Listed  
Company

**90%**  
Client Retention

**40+**  
**YEARS**  
of Consecutive  
Revenue Growth

**160K+**  
Users

**6K+**  
Client Institutions

**S&P**  
**500**  
Member since  
December 2021

[Learn More About Our Solutions](#)

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## LETTER FROM THE CEO

During our 2021 fiscal year, the COVID-19 pandemic remained a constant reality for us all. Together, we have persevered—and together, we are moving forward. Over this last year, we've evolved how we work and defined new ways to create, innovate, and collaborate with one another. Our ability to listen and adapt to our colleagues, clients, and communities in this new, mainly virtual environment has been key, and we are poised to continue doing so as we look towards the future.

At FactSet, our purpose is to drive the investment community to see more, think bigger, and do their best work. We are strongly committed to sustainable growth for our clients, employees, investors, and communities. The principles driving our sustainable development goals are built into all aspects of our business. To address ESG issues, drive our corporate sustainability strategy, and advance our positive impact, we've created a global Sustainability Committee. Its progress to date includes:

- Creating a Sustainability Plan, including a materiality assessment, to better understand internal and external expectations, evaluate our progress, and define further goals and aspirations
- Publishing our validated Scope 1 and Scope 2 greenhouse gas emissions for fiscal years 2019 and 2020
- Reporting to CDP and EcoVadis
- Publishing our workplace demographics for the first time, including our EEO-1 Federal data
- Creating the FactSet Global DE&I Council to further define and execute on our diversity, equity, and inclusion strategy
- Establishing a Supplier Code of Conduct that includes environmental and social sustainability provisions
- Becoming signatories of the UN PRI and Global Compact, stating our commitment to implement sustainable policies and transparent reporting for the ten principles of the global compact in the areas of human rights, labor, environment, and anti-corruption

“

**This report celebrates our values. We are an inclusive community unified by the FactSet spirit of going above and beyond. Our best ideas can come from anyone, anywhere, at any time. We roll up our sleeves to solve tough problems together and continually push each other to do better.**

”

**Phil Snow**  
Chief Executive  
Officer, FactSet





2022 Global Relay for Good volunteer event

This report celebrates our values and achievements. We are an inclusive community unified by the FactSet spirit of going above and beyond. Our best ideas can come from anyone, anywhere, at any time. We roll up our sleeves to solve tough problems together and continually push each other to do better. Last year, our corporate responsibility program delivered 263 volunteer events globally, with FactSet volunteers contributing over 14,000 hours of service. Our people remain our most valuable asset. And it is because of our people and our culture that we will foster sustainability and positively impact the people and communities around us.

I am pleased with what we've accomplished, and I am very optimistic about what is to come at FactSet. We appreciate your interest in our progress and look forward to your ongoing engagement as we continue on this journey.

**Phil Snow**  
Chief Executive Officer, FactSet

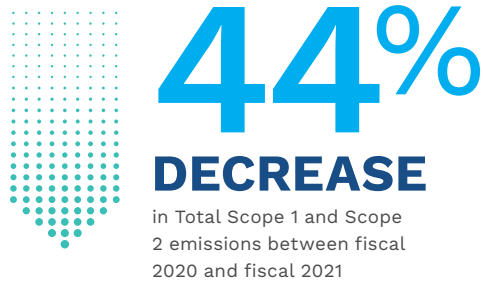
BY THE NUMBERS

**263**  
VOLUNTEER  
EVENTS

**14,000**  
HOURS  
OF SERVICE

## OVERALL HIGHLIGHTS

### ENVIRONMENT



### FACTSET IS COMMITTED



Responded to the CDP Climate Change questionnaire for the first time in fiscal 2021



### SCOPE 3 EMISSIONS

Started estimation of our Scope 3 emissions in 2022

### SOCIAL



### INCREASED EMPLOYEE ENGAGEMENT RESULTS



Survey revealed increased scores over 2020 results for all 31 scored questions at the company level



In February 2021, we hired our first Chief Diversity, Equity, and Inclusion Officer, exemplifying the executive support for encouraging and managing DE&I efforts



In fiscal 2021, on average per quarter, engaged in live or asynchronous e-learning sessions on Workday Live, Workday Digital, or LinkedIn Learning

### GOVERNANCE

## TRUVALUE LABS

which was fully integrated with our products in 2021, provides access to important ESG data. Clients can access scores based on Sustainability Accounting Standards Board (SASB) Standards and the United Nations Sustainable Development Goals (SDGs)



### “PLAN-DO-CHECK-ACT” METHODOLOGY

adopted based on an annual cycle of strategic planning, periodic internal and third-party assessments, and measured execution of targeted initiatives



# Organization and Reporting Practices

FactSet Research Systems Inc. (“we,” “our,” “us,” the “company,” or “FactSet”) creates flexible, open data and software solutions for over 160,000 investment professionals around the world, providing instant anytime, anywhere access to financial data and analytics that investors use to make crucial decisions. FactSet was founded in 1978 and has been publicly held since 1996. Headquartered in Norwalk, Connecticut, we are proud to be a global company with offices in 20 countries on six continents. We are all working together toward creating value for our clients, and we’re honored that over 90% of clients who use FactSet continue to use it, year after year.

## OUR VALUES



### Who We Are

We are an inclusive community unified by the FactSet spirit of going above and beyond. Our best ideas can come from anyone, anywhere, at any time.



### What We Aspire To

As big as we grow, as far as our reach, and as successful as we become, we stay connected to our clients and each other.



### How We Compete

Our clients see us as part of their team. We win as a team and celebrate our wins together.



### What We Promise

We continuously look ahead to advance the future of our industry. We relentlessly seek value for our clients because their success is our success.



### How We Work

We roll up our sleeves to solve tough problems together. We learn from our successes and our failures and continually push each other to do better.

→ **Avi S.**



# Sustainable Development Strategies, Policies, and Practices

FactSet is committed to sustainable growth for our clients, employees, partners, investors, and the communities in which we live and work. We continually monitor and improve our social practices, environmental and climate action, and governance initiatives while maintaining and strengthening our relationship with our stakeholders. With these relationships in mind, in our 2021 fiscal year (September 1, 2020 – August 31, 2021) we created a Sustainability Plan outlining our environmental, social, and governance (ESG) successes and goals for the future, which we detail throughout this report.

## Sustainability Committee

FactSet has formed an executive-sponsored Sustainability Committee, including five subcommittees, responsible for supporting the execution of our environmental, social, and governance goals and initiatives. The subcommittees consist of:

1. Environment and Facilities
2. Procurement
3. Employment, Total Rewards, and Training
4. Governance, Security, Ethics, and Policies
5. Annual Filings, Reports, and Communications

The FactSet Board of Directors oversees our ESG principles and implementation strategies while delegating day-to-day responsibility to the FactSet Executive Leadership Team (ELT). The ELT then provides direction to the Sustainability Committee for implementation. Each subcommittee meets at least once per month and routinely reports out to the Sustainability Committee, which also oversees the publication and dissemination of relevant sustainability reports and information.

## Stakeholder Engagement

A thorough gap analysis was completed in fiscal 2021 to understand FactSet's ESG sustainability strengths and opportunities. Information from several sources was used to complete this analysis, including current ESG ratings from ISS, MSCI, and Sustainalytics; client requests; and industry analysis.

The industry analysis looked at FactSet's peers, clients, and shareholders to understand their ESG accomplishments and preferences. This provided insight into FactSet's ESG achievements and opportunities for growth to best meet the needs and expectations of our stakeholders and our industry as a whole.



### Materiality Assessment

Based on our ESG strengths and opportunities, as well as detailed interviews with our leadership team, we established a list of material ESG topics for FactSet. We used a double materiality approach, which recognized that businesses should report both internal impacts (topics that influence enterprise value) and external impacts (topics that impact the overall economy, society, and environment).

#### MATERIALITY MATRIX



#### Environment

- 1. Carbon Emissions
- 2. Climate Risk Management
- 3. Energy Efficiency
- 4. Green Building
- 5. Water Efficiency

#### Social

- 6. Diversity, Equity, and Inclusion
- 7. Employee Engagement
- 8. Human Capital Development
- 9. Board Diversity
- 10. Community Engagement
- 11. Labor Standards and Working Conditions
- 12. Shareholder Democracy
- 13. Work-Life Balance

#### Governance

- 14. Business Ethics
- 15. Corporate Governance
- 16. Data Privacy and Security
- 17. ESG Products
- 18. Executive Compensation
- 19. Product Governance
- 20. Risk Management

## UN Sustainable Development Goals

The United Nations Sustainable Development Goals (UN SDGs or the Global Goals) were adopted by the United Nations in 2015 as a universal call to action to end poverty, protect the planet, and ensure that by 2030 all people could enjoy peace and prosperity. With a total of 17 overarching goals, each containing specific country-level targets and indicators to track progress towards the goals, businesses have an opportunity and a responsibility to align business practices and corporate goals to these targets and indicators.

With the completion of our inaugural materiality assessment in fiscal 2021, FactSet is making strides to increase its support and alignment to the UN SDGs. The table on the next page maps FactSet's material topics to corresponding UN SDGs and highlights the actions and/or initiatives established within the company to demonstrate commitment in these areas. In subsequent years, we plan to further implement the UN SDGs into daily operations by emulating the Global Goals' targets and indicators to inform FactSet's indicators of progress and define success in each material topic area.



↑ Employees in FactSet's  
Norwalk, CT office

	MATERIAL TOPIC	SDG	DESCRIPTION
Environment	Carbon Emissions		<p><b>Take urgent action to combat climate change and its impacts</b></p> <p>FactSet is monitoring Scope 1, 2, and relevant Scope 3 GHG emissions and developing a reduction plan to reduce its contribution to climate change.</p>
	Risk Management		<p><b>Take urgent action to combat climate change and its impacts</b></p> <p>FactSet is expanding upon current risk assessment and management processes to include climate risk to reduce the impact climate change will have on business operations.</p>
Social	Human Capital Development		<p><b>Promote sustained, inclusive, and sustainable economic growth, full and productive employment, and decent work for all</b></p> <p>FactSet is devoting resources to improving human capital development, including training and professional development opportunities, and other opportunities for professional growth among employees.</p>
	Diversity, Equity, Inclusion		<p><b>Achieve gender equality and empower all women and girls</b></p> <p>FactSet is completing a company-wide compensation assessment to assess potential wage gaps.</p>
	Diversity, Equity, Inclusion		<p><b>Reduce inequality</b></p> <p>FactSet offers opportunities across all gender, race, ethnicity, and backgrounds for all employees.</p>
	Employee Engagement		<p><b>Promote sustained, inclusive, and sustainable economic growth, full and productive employment, and decent work for all</b></p> <p>FactSet is committed to monitoring and improving employee engagement through engagement surveys and employee representation and inclusion.</p>
Governance	Corporate Governance		<p><b>Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions at all levels</b></p> <p>FactSet is ensuring that governance at all levels, including the highest levels, is executed sustainably and equitably.</p>
	Data Privacy and Security		<p><b>Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions at all levels</b></p> <p>FactSet is ensuring that all client and employee data is kept private and secure.</p>
	Business Ethics		<p><b>Promote peaceful and inclusive societies for sustainable development, provide access to justice for all, and build effective, accountable, and inclusive institutions at all levels</b></p> <p>FactSet is ensuring that all business is conducted ethically throughout the company.</p>
	ESG Products		<p><b>Ensure sustainable consumption and production patterns</b></p> <p>FactSet creates products that allow clients to make sustainable decisions in their investments and businesses.</p>

SECTION

2

# Environment

- By the Numbers
- Introduction
- Initiatives
- Case Study

# ENVIRONMENT

## BY THE NUMBERS

### SCOPE 3 EMISSIONS

Estimation began in 2022

# 44%

## DECREASE

in Total Scope 1 and Scope 2 emissions between fiscal 2020 and fiscal 2021



### PAPER WASTE REDUCTION AT FACTSET FACILITIES

All FactSet facilities partner with local paper shredding and recycling organizations to reduce the amount of paper waste entering landfills

### CLIMATE RISK ANALYSIS



We are in the process of completing a thorough climate risk analysis, in which we will identify FactSet's biggest business and operation risks that could result from climate change, and outline plans to manage these risks and adapt to these changes

### 1<sup>ST</sup> CDP RESPONSE

FactSet responded to CDP for the first time in fiscal 2021 to demonstrate to clients, peers, and investors that FactSet is committed to gaining a better understanding of our impact on climate-related issues



### GREEN BUILDINGS

Of FactSet's global locations, 12 buildings have received LEED or LEED-equivalent certification

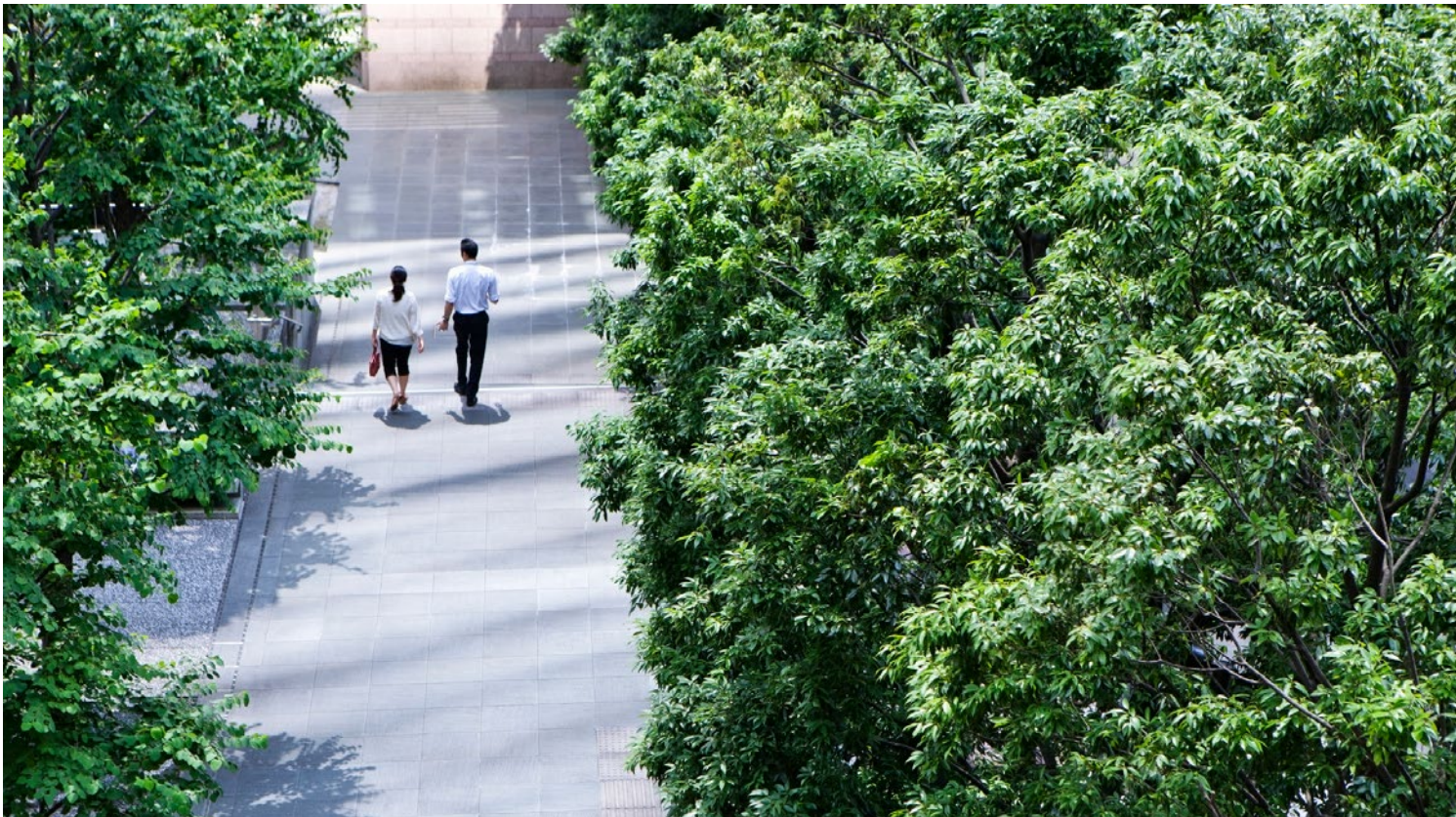
# Environment

We believe every company has the responsibility to minimize its environmental footprint, which is why measuring and reducing our carbon footprint is central to FactSet's environmental efforts. Continuing to calculate and report on our greenhouse gas inventory while implementing programs to reduce our total emissions are priority business objectives. Greenhouse gas (GHG) emissions contribute to climate change, which can negatively impact many aspects of society through changes in temperature, precipitation, extreme weather events, fires, droughts, and floods. We take these risks seriously and recognize our ability to impact and reduce our contribution to climate change. To meet this challenge, we have begun to monitor our Scope 1 and Scope 2 GHG emissions closely and have started to track and capture some of our most material Scope 3 emissions for our 2022 fiscal year.

FactSet is committed to being a responsible steward of the environment and climate through its environmental initiatives, actions, and reporting and is currently working on setting appropriate targets and reduction strategies. The Environment and Facilities subcommittee, a global team of employees from various departments and locations, was founded to assist in the establishment and implementation of these strategies. FactSet aims to address environmental impacts in a collaborative way that engages all stakeholders, especially employees.



**FactSet aims to address environmental impacts in a collaborative way that engages all stakeholders**





## Carbon Emissions

FactSet sharpened its focus in fiscal 2021 on environmental initiatives, including conducting our first greenhouse gas inventories for fiscal 2019 and fiscal 2020 in line with the Greenhouse Gas Protocol, covering all relevant Scope 1 and Scope 2 emissions across our operational boundary.\* Both inventories were third-party validated to the ISO 14064-1 standard to assure the quality of the emissions calculations and the inventories accurately reflect FactSet's carbon impact. After completing these inventories, we identified locations where improved consumption tracking methods are necessary and locations where energy reduction initiatives will have the most impact. These improved data collection methods will be leveraged to achieve deeper insight into the impact FactSet has on the climate while allowing for the identification of emissions reduction opportunities for years to come.

Carbon emissions represent one of FactSet's most material topics. As a global data solutions provider, it is imperative that we take the appropriate steps to quantify our Scope 1 and 2 emissions. Scope 1 accounts for emissions that an organization is directly responsible for, including but not limited to transportation in company leased/owned vehicles for business purposes, fuel heating, and refrigerant losses. Scope 2 accounts for indirect emissions that the organization is responsible for, including but not limited to electricity usage. Due to limitations in the available data, our initial inventory does not cover Scope 3: Corporate Supply Chain emissions. However, we recognize that the emissions associated with FactSet's value chain, including the operational ramifications of the work-from-home model, are essential to add to our carbon emissions accounting to make a well-informed carbon reduction goal. Monitoring our emissions allows us to better understand where our emissions are coming from and where there are opportunities for reduction measures. We have also begun implementing environmental practices and policies that encourage more efficient energy use as natural gas and purchased electricity currently account for the largest contributors to our GHG emissions.



### Calculated Scope 1 and Scope 2 GHG Emissions in 2021

#### GHG INVENTORY

Fiscal Year	Scope 1 (MT CO2e)	Scope 2 (MT CO2e)	Total (Scope 1 + 2 – MT CO2e)
2019	3,763.95	11,520.88	15,284.83
2020	1,011.47	10,750.91	11,762.38
2021	1,306.46	5,335.90	6,642.36

Compared to fiscal 2020 emissions, FactSet's GHG inventory for fiscal 2021 demonstrates a decrease of 44% of total emissions in Scope 1 and 2. Scope 2 emissions from purchased electricity decreased by 50% between fiscal 2020 and 2021 due to a 30% reduction in total electricity consumption. The decrease in total CO2e emissions, as well as the decrease in energy consumption, are attributable to the continued shift to a work-from-home environment as the result of the on-going global pandemic in addition to the closing of older and smaller locations. This shift can also be partially attributed to the general downward trend of electricity-based emissions factors due to continued investment in renewable energy across the globe.

\* Operational control was used to establish organizational boundaries. The organizational boundary includes leased offices and data centers. Reporting boundaries include Scope 1 and Scope 2 emissions. Significant emissions include all direct and indirect emissions resulting from FactSet's operations with sufficient data within the reporting period and organizational/reporting boundaries.

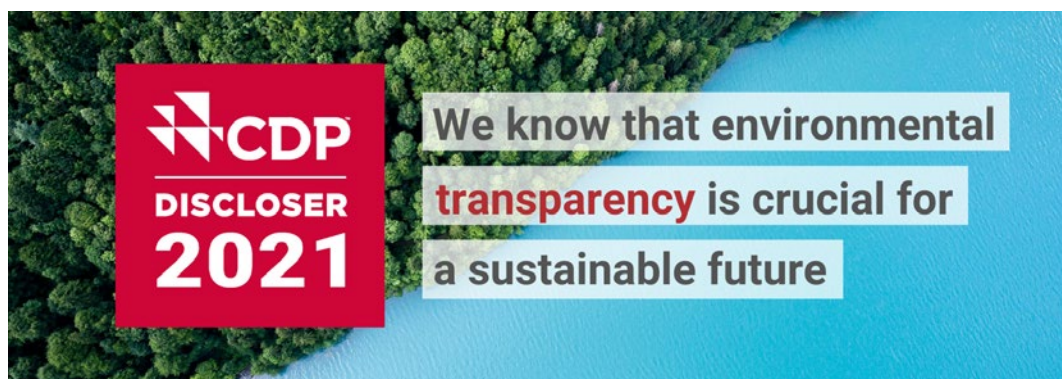
## INITIATIVES

### Climate Risk

We understand that even with a reduction in greenhouse gas emissions, effects from climate change are still likely to affect our business operations, especially given our global presence. We must mitigate our contribution by reducing our greenhouse gas emissions and adapting and preparing for the impacts already being felt because of climate change. We are in the process of completing a thorough climate risk analysis, in which we will identify FactSet's biggest business and operational risks that could result from the effects of climate change and outline plans to manage these risks and adapt to these changes. Risk categories include natural phenomena (e.g., adverse weather events) and man-made phenomena (e.g., supply chain disruptions, infrastructure complications). These risks vary by location and are assessed in terms of the magnitude of impact a risk could have as well as the frequency at which the risk is expected to occur: using this information, the risk is determined to be a low, medium, or high risk and actions are taken accordingly. Proactively addressing these issues positions FactSet to plan for the risks and avoid, or significantly reduce, the impacts on our clients and stakeholders that climate change may bring, and we are in the process of incorporating climate-risk into our Enterprise Risk Management (ERM) process.

### CDP

CDP, formerly known as the Carbon Disclosure Project, is a non-profit disclosure platform aiming to increase awareness and disclosure of each organization's impact on climate, forests, and water. FactSet completed the CDP Climate Change Questionnaire for the first time in fiscal 2021 in response to client requests. The process of completing the questionnaire involved collaboration across the company and helped identify climate-related risks and opportunities to explore moving forward. Submitting our response to CDP served as an integral step to demonstrate to clients, peers, and investors that FactSet is committed to gaining a better understanding of our impact on climate-related issues and striving to improve our operations by continually monitoring our progress and implementing current best practices. CDP's climate questionnaire is aligned with the Task Force on Climate-Related Financial Disclosures (TCFD) recommendations, enabling companies to report high quality, comparable climate-related financial information and impacts. In an effort to better align our climate disclosures with industry best practices, we plan to produce a TCFD aligned report in the coming years.



### Improved Emissions Tracking

To gain a more accurate representation of the total emissions associated with FactSet's operations, FactSet has begun developing and implementing a methodology to calculate emissions related to employee teleworking (Scope 3). Since fiscal 2020, we have been impacted by unprecedented times due to the COVID-19 pandemic, which has resulted in an operational shift from in-office work to a work-from-home or hybrid environment. Moving forward, a work-from-home or hybrid work environment is part of our new FactSet work standards. Because of this, Scope 1 and 2 emissions are likely to decrease due to fewer people working directly at FactSet facilities. However, FactSet aims to include Scope 3 (indirect) emissions, particularly emissions associated with employee commuting, teleworking, and business travel, in the next greenhouse gas inventory to ensure a fair and accurate representation of FactSet's operational CO<sub>2</sub>e emissions.

### Green Buildings

FactSet continues to manage operations responsibly by emphasizing the importance of green buildings and improving upon previous practices to increase the efficiency of operations across all facilities. Of FactSet's array of global locations, 12 buildings have obtained LEED or LEED-equivalent (e.g., BREEAM) certification. Through the certification processes, we learned valuable lessons to inform newly leased facilities and retrofitting of older, existing facilities. FactSet recognizes the importance of accurately measuring and disclosing environmental metrics associated with operating buildings. An improved audit is being designed to better track ESG metrics at each facility and to help measure the success of implemented initiatives and identify opportunities for improvement.





## Waste

Paper is the largest source of waste from FactSet's operations. To limit the amount of paper entering landfills, all FactSet facilities partner with local paper shredding services that recycle all received waste. In fiscal 2021, FactSet locations recycled over 7,000 metric tons of paper.

Robust internal policies exist within the company for the treatment of office furniture and electronics at the end of their life. Where the necessary services are available, office furniture in reasonable condition is offered to the office staff, then to the other tenants in the building, and finally to local non-profits. The remaining equipment is then removed by a third-party office decommissioning company with the understanding that everything hauled away will first be resold/reused, recycled, and after those activities, the remainder is sent to a landfill.

For electronics (e-waste) third-party vendors are utilized to ensure that destruction is done in an environmentally friendly manner consistent with local requirements. Current estimates are that more than 28 metric tons of e-waste, including batteries, out-of-date electronic equipment, and other such materials, is being recycled annually by FactSet to prevent harmful metals from being dispersed into the environment.

We are working to better quantify how much of each of these waste streams is sent to the landfill and plan to use this to inform purchasing decisions and as a criterion when selecting waste management vendors.



**7,000 Metric  
Tons of Paper  
Recycled**



**28 Metric Tons  
of E-Waste  
Recycled**

**CASE STUDY**

FactSet has continued its approach of giving preference for spaces in buildings that are LEED certified with our new office in One Le Grand Tower, Taguig City, Philippines. This building is in the process of obtaining LEED Silver Certification. This new high-rise office building includes covered parking, first floor retail, and amenities. Overall, the building is expected to utilize 22% less energy than a local code-compliant office.

**PLUMBING**

As part of the lease agreement, the building owner and FactSet will provide low flow fixtures for all plumbing, including the fixtures installed as part of the office's kitchenette. All fixtures are designed to be EPA Water Sense equivalent and will reduce the buildings water use by 42% over traditional American standards.

The highlight of these fixtures includes waterless urinals. The building owner and FactSet are committed to only using green cleaning practices when maintaining all fixtures.

**LIGHTING**

As part of the lease agreement, FactSet will provide and install all LED lighting that limits the installed lighting power density to 5.0 W/ sq m. This exceeds the local code requirements by more than 50%.

The Manila office utilizes advanced lighting controls, including occupancy sensors in conference rooms, storage rooms, and private offices. The building's window systems are optimized to reduce glare while allowing the daylighting controls to operate over a larger range of conditions. All perimeter spaces will be equipped with daylighting controls. These controls act continuously to dim the overhead lighting when sufficient sunlight can be used to light the room.

The building owner is also committed to reducing the overall common area lighting demand by installing LED fixtures throughout the parking garage. Occupancy sensors that reduce the lighting to 50% load during unoccupied time are also installed. These occupancy sensors meet the safety needs of the parking area in a sustainable manner.

**22%**

**LESS ENERGY**

**The building is expected to utilize 22% less energy than a local code compliant office**

**METERING**

A significant benefit of this office space has been the ability to ensure that we can properly capture energy use for not only electricity, but also for cooling and mechanical systems. As part of the building's advanced energy metering initiative, all electrical systems are sub-metered and the flow meters are installed for the chilled water on all air handling units. We will be able to track and measure our energy use for our space monthly. This will allow us to ensure that the space is being used in a green and sustainable way. Taking ownership of the energy use also assists our greenhouse gas emissions tracking and reduction goals.

**MECHANICAL**

The building is cooled by central high-efficiency chillers and variable-speed-induced draft colling towers. There are variable air volume air handling units that serve terminal units throughout the space. As no heating is needed for this specific location, the terminal units are designed to minimize reheat needs by reducing airflow to almost 100% outdoor air conditions.

The design includes two central dedicated outdoor air shafts that temper the outdoor air before delivery. Each provided air handling unit pulls only the required outdoor air for the tenant's needs. Areas that require a high density of people, such as conference rooms, will be equipped with demand control ventilation that will allow the required outdoor air to be delivered to the spaces where it is needed most.

The central chiller plant has a seasonal efficiency that is 50% better than the efficiency required by the local energy code.

SECTION

3

# Social

- By the Numbers
- Diversity, Equity, and Inclusion
- Human Capital Development
- Community and Volunteerism
- Employee Engagement and Wellbeing

# SOCIAL

## BY THE NUMBERS

FactSet delivered

**263** VOLUNTEER  
EVENTS  
GLOBALLY

in 20 countries and 32 FactSet locations

**11,000**

**VOLUNTEER ROLES**

and over 14,000 total volunteer hours



Enabled the planting of

**14,000+**  
**TREES**

**80,000+**

young people assisted with gaining qualifications, higher education, or employment



PROVIDED

**1 MILLION+**  
**MEALS**

**100,000+**

data points created to support environmental research and disaster relief

**92%**

Employee engagement survey response rate was 92%—a 6% increase over the 2020 survey

Announced participation in the

**CEO ACTION  
FOR RACIAL  
EQUITY™**



**80%**

of employees on average per quarter, engaged in live or asynchronous e-learning sessions on Workday Live, Workday Digital, or LinkedIn Learning

**WORKFORCE  
DEMOGRAPHICS**



For the first time, we published our workforce demographics (including sharing our Federal EEO-1 data)

**1<sup>ST</sup>**

**CHIEF DIVERSITY,  
EQUITY, AND  
INCLUSION OFFICER**

Hired our first Chief Diversity, Equity, and Inclusion Officer

# Diversity, Equity, and Inclusion

Diversity, Equity, and Inclusion (DE&I) at FactSet begins with a commitment from our CEO and the entire FactSet leadership team. We recognize that our internal and external stakeholders care about DE&I because of FactSet's global relevance and the positive impact opportunities we have in this space. As a demonstration of our commitment to DE&I, in February 2021, we hired our first Chief Diversity, Equity, and Inclusion Officer. As part of our DE&I strategy, we established the FactSet Global DE&I Council, consisting of over 20+ senior leaders from across FactSet who are empowered to drive our DE&I goals and create strategic accountability for results. In addition, our senior leaders serve as Executive Sponsors for our Business Resource Groups (BRGs) or employee networks. We have significantly increased our investment in DE&I, both in staffing and budget, including creating a team of six dedicated DE&I staff globally.

## GLOBAL DE&I COUNCIL

**Established the FactSet Global DE&I Council, consisting of senior leaders representing all of our business areas**





**MESSAGE FROM THE****Global Chief Diversity, Equity, and Inclusion Officer**

I am pleased to share an update on our fiscal 2021 diversity, equity, and inclusion efforts at FactSet. This year's DE&I section of the report reflects our commitment to measurably change and increase demographic representation and our efforts to build a truly inclusive culture. At FactSet, we recognize that our employees are more productive and engaged when bringing their full identities into the workplace. We also recognize that innovation and creativity are unleashed when all talent can thrive.

Our global leadership continues its commitment to supporting an inclusive workplace and we have created a Global DE&I Council chaired by our CEO consisting of senior leaders representing all of our business areas. Additionally, by signing the CEO Action for Diversity and Inclusion Pledge and participating in the CEO Action for Racial Equity Fellowship program, we are taking an active part in advancing public policy in the United States.



**We will continue to invest and take further actions to expand and deepen our global DE&I journey to ensure an inclusive and equitable workplace where everyone has a sense of belonging whilst creating economic opportunity and positively impacting the communities in which we operate.**



Also, in fiscal 2021, as we continue our global DE&I journey and deliver on our commitment, we formed a fully staffed six-person global DE&I team with regionally dedicated team members in the Americas, EMEA, and APAC.

While we are proud of some early wins, we are not yet where we want to be and we recognize there is much more to be done. We remain committed and focused on creating sustained equitable impact for all stakeholders, including employees, clients, investors, and society. To this end, we will continue to invest and take further actions to expand and deepen our global DE&I journey to ensure an inclusive and equitable workplace where everyone has a sense of belonging whilst creating economic opportunity and positively impacting the communities in which we operate.



**Vinay Kapoor**  
Global Chief  
Diversity, Equity, and  
Inclusion Officer

In fiscal 2021, as we embedded DE&I into all our Global Talent Processes, including talent reviews and promotions, we investigated any statistical demographic differences and took appropriate action. We continue to engage and develop FactSetters through an enriched catalog of global educational initiatives, including topics on Racial Justice, Unconscious Bias, Stop Asian Hate, Turning Obstacles into Opportunities, Black talent research and Latinx talent research, Understanding Multiculturalism, Pride and Transgender Awareness, Traits of a Veteran, along with topics on Women's History. We have invested in LinkedIn Learning to support talent development across the organization. Additionally, we continue to foster engagement by empowering our global Business Resource Groups (BRGs) to provide safe networking spaces, champion change, and enable all FactSetters to bring their authentic selves to work.

**Global DE&I Strategy**

In fiscal 2021, we refreshed our DE&I strategy and expanded its scope. We focus on three impact areas—Workforce, Marketplace, and Society—with twelve levers to drive these impact areas.

**IMPACT AREAS AND LEVERS**



**LEADERSHIP COMMITMENT**

**CEO Action Pledge**

**CEO ACTION FOR DIVERSITY & INCLUSION**

FactSet’s CEO, Phil Snow, has strengthened our commitment to supporting an inclusive workplace by signing the CEO Action for Diversity and Inclusion Pledge. Here’s what that means to us:

- We will continue to make our workplace a trusting place to have complex and sometimes difficult conversations about diversity and inclusion
- We will implement and expand unconscious bias education
- We will share best practices—and lessons learned—with other companies

The CEO Action for Diversity & Inclusion™ aims to rally the business community to advance diversity & inclusion within the workplace by working collectively across organizations and sectors. It outlines a specific set of actions the participating companies will take to cultivate a trusting environment where all ideas are welcomed, and employees feel comfortable and empowered to discuss diversity & inclusion.

**CEO Action Fellowship**

**CEO ACTION FOR RACIAL EQUITY**

FactSet is participating in the CEO Action for Racial Equity™, which represents a major milestone as we take an active part in the advancement of public policy. We have sponsored two FactSetters as they joined the CEO Action for Racial Equity Fellowship. The CEO Action

for Racial Equity fellowship focuses on improving the lives of over 47 million Black Americans through advocacy and advancement of public policies to root out and end systemic racism. Alongside over 200 fellows representing over 100 companies, the two FactSetters work full-time on assignments that advance social justice in the United States.



⌚ **Josh G.  
Samhitha V.  
Lauren M.**

**MLT (Management Leadership for Tomorrow) Contribution**



FactSet furthers racial equity and inclusion efforts by recently joining [Management Leadership for Tomorrow's Black Equity at Work Certification Program](#).

“FactSet is committed to doing the work necessary to foster a culture of equity,” said Vinay Kapoor, Global Chief Diversity, Equity & Inclusion Officer. “Holding ourselves accountable to MLT Black Equity at Work standards will be a guiding compass as we strive to further the inclusion of Black Americans within our workforce. The steps we take as a result will help us in our efforts to drive meaningful, measurable change.”

As part of the MLT Certification process, FactSet will develop a detailed three-year plan for MLT’s approval, which will determine measurable goals under the following five pillars:

1 Black Representation at Every Level	4 Racially Just Business Practices
2 Compensation Equity	5 Racial Justice Contributions and Investments
3 Inclusive, Anti-Racist Work Environment	

**HRC (Human Rights Campaign)**



FactSet proudly signed the [HRC Business Statement on Anti-LGBTQ State Legislation](#), stating our clear opposition to harmful legislation to restrict the access of LGBTQ+ people in society. We are deeply concerned by the bills being introduced in state houses across the United States that single out LGBTQ+ individuals—many specifically targeting transgender youth—for exclusion or differential treatment. Laws that would affect access to medical care for transgender people, parental rights, social and family services, student sports, or access to public facilities such as restrooms, unnecessarily and uncharitably single out already marginalized groups for additional disadvantage. They seek to put the authority of state government behind discrimination and promote mistreatment of a targeted LGBTQ+ population.

**HRC The Business Coalition for the Equality Act**



FactSet proudly joined the [HRC Business Coalition for the Equality Act](#), supporting the federal legislation that would provide the same basic protections to LGBTQ+ people as are provided to other protected groups under federal law.

The Equality Act creates clear, consistent protections to prohibit discrimination on the basis of sexual orientation and gender identity in employment ensuring that LGBTQ+ employees are hired, fired, and promoted based on their performance. In addition, the bill provides protections from discrimination for LGBTQ+ people in housing, credit, and jury service. The bill would also prohibit discrimination in public spaces and services, and federal funding on the basis of sex, sexual orientation, and gender identity.

**TRANSPARENCY AND ACCOUNTABILITY**

**People Processes, Retention, & Advancement**

In fiscal 2021, we facilitated numerous BRG-led mentorship programs to boost employee advancement and continue to invest in LinkedIn Learning to support talent development across the organization. We continued to embed DE&I into all our Global Talent Processes, including talent reviews and promotions, we investigated any statistical demographic differences and took appropriate action.

**Recruitment**

We focus on hiring talent who contribute diverse backgrounds, perspectives, and experiences to our company. FactSet’s diversity recruiting strategy is supported by multiple partnerships with a wide range of universities, associations, and organizations, as well as a fair and equitable process to deliver the most diverse candidate slates possible for all positions. Our global Talent Acquisition team has been trained in best practices around developing inclusive job descriptions, prioritizing candidate evaluation criteria, and dismantling bias in the interview process. Through engagement and partnerships, we develop annual recruitment strategies so that FactSet is seen as an employer of choice for all.

In fiscal 2021, we were delighted to launch our inaugural MESH (Mentor, Engage, Support, and Hire) Externship Program. The MESH program brings together underrepresented students with a common interest in the Financial Technology (Fintech) industry. The program launched with a focus on Black, Latinx, and Native American talent, to help mentor, engage, support, and hire first or second-year college students interested in finance, technology, and/or client service.



**“I started a lifetime career at FactSet and made my way among people who became family.”**

**Sarah K.** Joined as an intern in 2020, Consultant in 2021



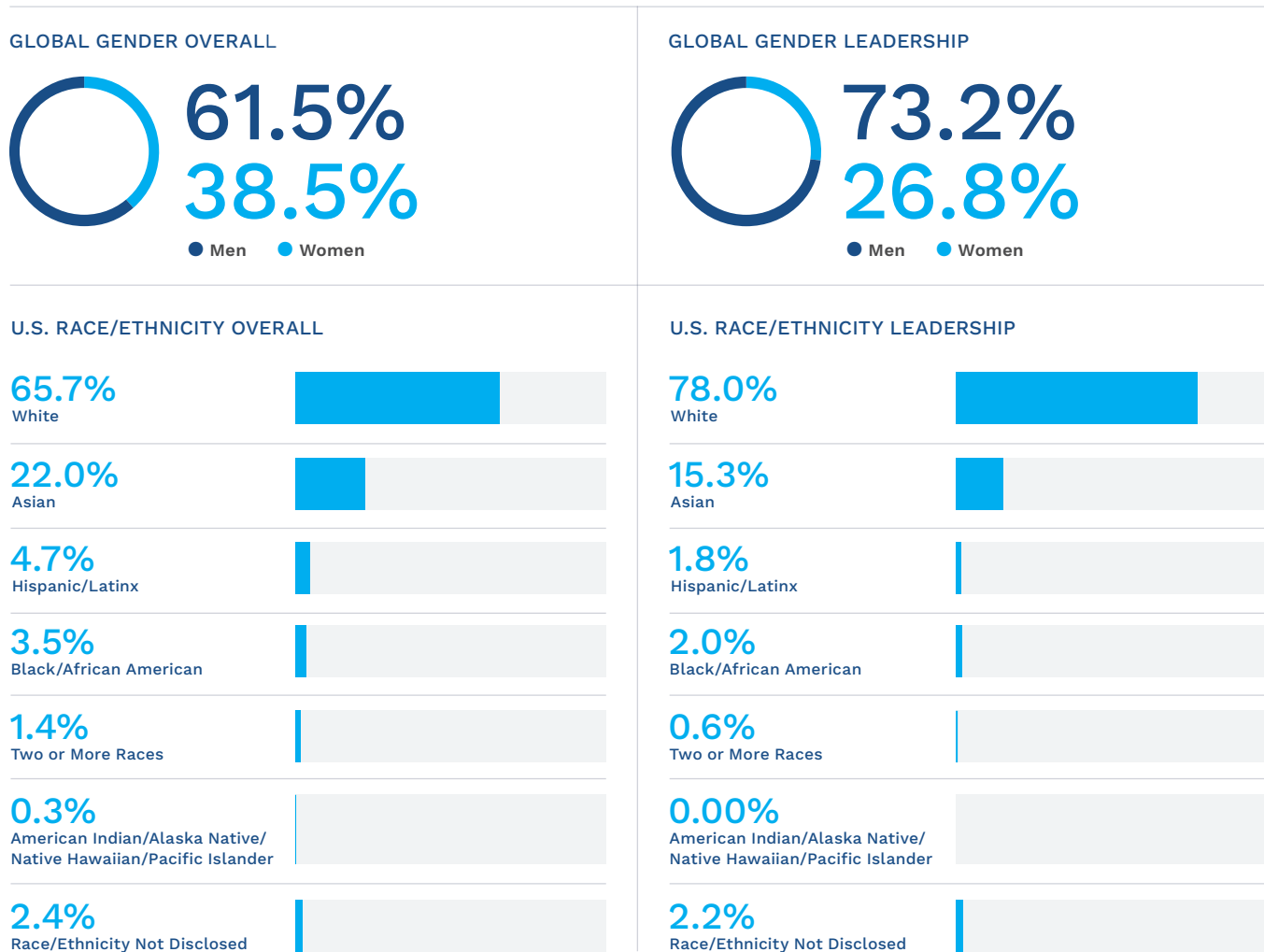
**“The energy, flexibility, and mentorship at FactSet are incredibly helpful and rewarding.”**

**Zoe L.** Joined as an intern in 2021, Client Solutions Associate in 2022



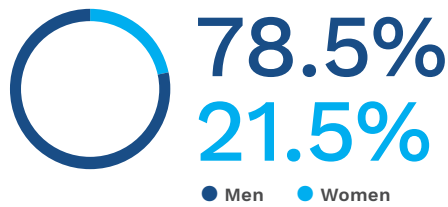
### Workforce Representation

During fiscal 2021, for the first time, we published our workforce demographics (including sharing our [Federal EEO-1](#) data) to make a visible step in our commitment and our goal to identify and address disparities to help accelerate our aspirational goals. While we recognize the value of the EEO-1 reporting structure, we believe that the EEO-1 format is limited in terms of reporting diversity of backgrounds and geographic scope. To help overcome these limitations, we also measure our Diversity, Equity, & Inclusion progress through additional qualitative and quantitative data points. In this report, we provide additional workforce demographic data to further increase the transparency of our disclosure and assist with measuring and accounting for our progress. We will continue to report on our progress annually to facilitate accountability.

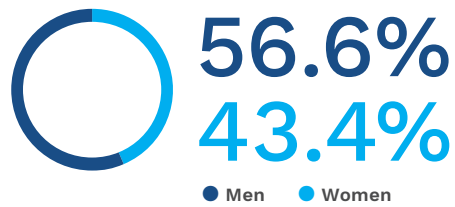


**Global Gender reporting methodology and notes:** All data is as of August 31, 2021. Leadership is defined as VP level and above. All data is based on self-identification and does not include employees who have not disclosed their gender. We recognize that our current gender reporting is not yet inclusive of people who identify as non-binary.

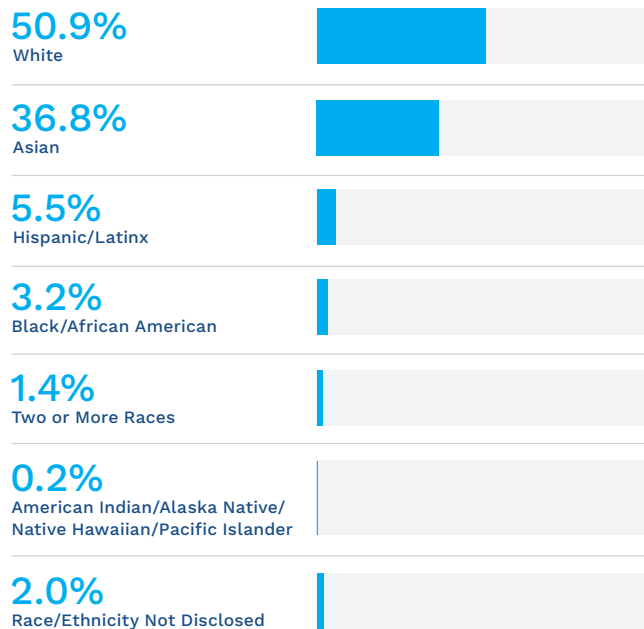
GLOBAL GENDER TECH



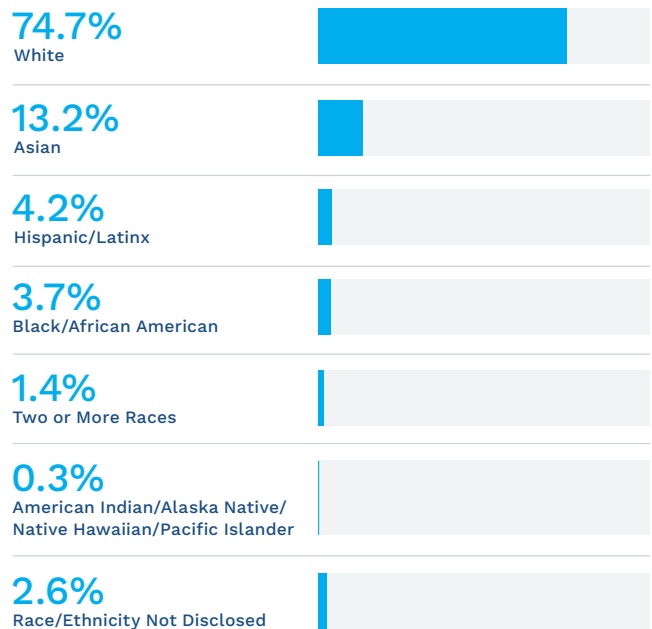
GLOBAL GENDER NON-TECH



U.S. RACE/ETHNICITY TECH



U.S. RACE/ETHNICITY NON-TECH



“We focus on hiring talent who contribute diverse backgrounds, perspectives, and experiences to our company.”



Stephanie B., Yel T., Jaroslava S., Raphael L.

**U.S. Race/Ethnicity reporting methodology and notes:** All data is as of August 31, 2021. U.S. race/ethnicity data is categorized based government-defined U.S. EEO-1 reporting standards, with the exception of “Race/Ethnicity not disclosed.” All data is based on self-identification. Leadership is defined as VP and above. Percentages may not add up to 100% due to rounding.

## EDUCATE AND ENGAGE

### Business Resource Groups (BRGs) (Global)

BRGs are company-sponsored and employee-led communities with a mission to champion the full participation of our employees at all levels. While each BRG focuses on a specific dimension of diversity, all are guided by our core value of inclusion and open to all employees, regardless of cultural backgrounds, sexual orientation, or origin.

Our Business Resource Groups are one of many diversity initiatives advocating for the full participation and inclusion of FactSetters. They support the recruitment, development, and retention of our diverse talent with participation open to all employees.



The Asian BRG hosted multiple events to celebrate Asian American and Native Hawaiian/Pacific Islander (AANHPI) Heritage Month.

The group also hosted a safe space session to facilitate greater awareness and understanding of Stop Asian Hate and Anti-Asian bias, racism, and violence in and out of the workplace, providing a space for members and allies to reflect and share personal stories. The group continues to engage employees through educational resources, workshops, and speaker events throughout the year focused on supporting Asians in the workforce and promoting ways for colleagues to become better allies.



The Black BRG hosted multiple events and keynote presentations to recognize Black History Month and Juneteenth with a focus on resiliency through adversity.

The group also hosted a safe space session in the wake of the Derek Chauvin verdict for the murder of George Floyd and discussed how events of race-based discrimination and violence have impacted colleagues personally and professionally. The group continues to provide awareness, visibility, and support through programming and educational resources focused on how we can advocate for racial justice in our society and provide tips to better serve as an ally to the Black community.



The Latinx BRG hosted multiple events to celebrate Latinx Heritage Month, focusing on culture, career, and leadership development. Additionally, the group engaged employees through Cafecito (coffee chats) sessions to learn about and celebrate Latinx culture in addition to hosting partnership events with other BRGs focused on the

importance of understanding intersectionality within the diverse communities. The group continues to collaborate with our delivery partners on Latinx talent research while providing helpful tools and resources on how we can better support and become more aware of the Latinx experience in Corporate America and our communities.



The Families BRG launched in 2021 with a focus to help foster an inclusive and supportive culture where current and prospective employees

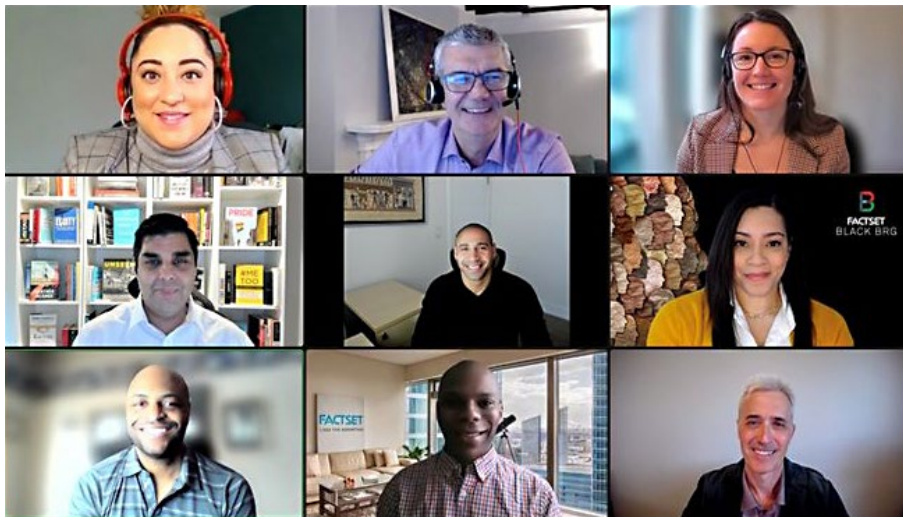
with family responsibilities are empowered to thrive in their career and home life. The group held a series of events with FactSet Leaders about Turning Obstacles into Opportunities during the Pandemic. The group continues to support each other through educational activities, information sharing, promoting and celebrating the benefits of flexibility in a diverse family workforce which provide the opportunity for parents and caregivers to connect and exchange experiences and ideas.



The Multicultural BRG launched in 2021 to inspire curiosity, build trust, and allow each person to be truly authentic at work. The group held virtual programming to recognize Black History Month (UK), Lunar New Year, and other cultural

celebrations. Additionally, the group hosted events discussing the power of multiculturalism, storytelling, equity, and empathy. The group aims to accelerate innovation by fully capturing the talent of a diverse team through educational resources focused on learning more about the multicultural experience and how we can be better allies.





← An event hosted by our Black Business Resource group, FactSetters heard from Dr. Natalie Watson-Singleton on “The State of Black Health in the Face of Two Pandemics” and the importance of physical and mental health as we celebrate Black History Month with events centered around the theme of Black Health and Wellness. FactSetters engaged with content that aligns with our values and commitment to providing resources and building an inclusive culture. At FactSet, we remain committed to amplifying Black voices to advocate for change.



The Pride BRG hosted multiple events to celebrate Pride Month and in 2021, expanded its collaborative programming globally. The group also recognized several Pride awareness dates throughout the year including World Aids Day, Transgender Awareness Week, National Coming Out Day, LGBTQ+ History Month, Bi-Visibility Day, etc. The group also launched a Pride Ally Guide to provide further resources to colleagues. The group continues to focus on engaging employees through Pride Awareness programming and educational resources.



The Veterans BRG hosted events in observance of Memorial Day, Veterans Day, 9/11, and Remembrance Day. The group collaborated with employees to become mentors through the American Corporate Partners (ACP) program focusing on helping veterans and their spouses transition into civilian professions through one-on-one mentoring, and online career advice. The group focuses on increasing its impact on the veteran population in communities we operate, including fundraisers and charitable contributions. They aim to empower military service members with the capacity and confidence to succeed at work, at home, and on deployment through allyship.



The Women's BRG hosted multiple events and activities to recognize Women's Month & International Women's Day, including an array of internal and external keynote speakers and panelists focusing on the Power of Choice. Additionally, the group led the global mentorship program and held numerous round table discussions on Allyship, Intersectionality, Gender Pay, etc. The group continues to engage colleagues through educational resources, workshops, and speaker events throughout the year to promote gender diversity and enhance the employee experience.

## Inclusive Education (Racial Justice Allies) (Global)

The aim of the Racial Justice Allies (RJA) initiative at FactSet is to raise awareness of how racism is experienced by those around us. The Racial Justice Allies program is led by the Diversity, Equity, & Inclusion team in partnership with the Learning & Development team to empower colleagues to better understand racial injustice and privilege, exploring how we can take active steps to become more supportive and authentic allies through a series of small group "book club" discussions, webinars, and listening circles.

## DE&I Awards



### Human Rights Campaign - Corporate Equality Index

FactSet scored 100 on the [Corporate Equality Index™](#), the Human Rights Campaign Foundation's national benchmarking tool on policies and practices pertaining to LGBTQ+ employees, earning the distinction of Best Place to Work for LGBTQ Equality for the seventh consecutive year.



### Women in Finance Awards

FactSet's Jaime Beckel, Executive Director, Sales, was honored with the Individual Achievement Award at the 2021 U.S. Women in Finance Awards from Markets Media. This award celebrates and recognizes the outstanding women influencing the U.S. finance industry.



### Fairygodboss

FactSet has been rated a Best Company for Women and a Best Technology Company for Women in 2021 as determined by [Fairygodboss](#). Fairygodboss offers a women's career community, expert career advice, job openings, and company reviews to help women advance their careers.



### Fortune Great Place to Work

FactSet has been recognized as a Great Place to Work for Women by *Fortune*.

## Planned Initiatives

In fiscal 2022, we will continue to expand and deepen our DE&I journey through the introduction of new programs, including the expansion of our global self-id program, flagship sponsorship program, supplier diversity program, and additional educational resources whilst continuing to build DE&I accountability across the organization.

FactSet's leadership is committed to improving diversity representation as part of our DE&I strategy. To this end, FactSet will continue investing in DE&I resources and initiatives. Together, we will work to recruit, advance, and engage talent at FactSet with an inclusive culture unified by the FactSet spirit of going above and beyond. By continuing to report our workforce demographics as part of our DE&I strategy, we are making a visible step in our commitment. By 2023 we aspire to measurably change the make-up of our employee demographics to better include underrepresented groups. We will continue to report on our progress in our annual Sustainability report.

# Employee Learning and Development

FactSet's growth mindset is an essential part of who we are and how we work, and it is reflected in the value we place in our greatest asset—our talented workforce. At FactSet, we believe that each employee has a unique connection to our vision and strategy, to the community of our company, and the communities in which we live. We cultivate these connections through key initiatives to empower each FactSetter to grow their careers, and help employees develop long-lasting relationships with colleagues and clients. We enable each employee to be their most productive self, both at work and in their personal lives, by promoting flexibility in how and where we work, secure in the knowledge that our best ideas come from anyone, anywhere, at any time. FactSetters work hard, work smart, work together, and make time for what's important in our lives, which includes giving back to our communities and the world at large. At FactSet, we uncover what's possible together, and we infuse our growth mindset into relationships with our clients and investors, driving them to see more, think bigger, and do their best work.

## Learning & Development Team

FactSet's Learning & Development (L&D) Team supports career advancement as well as provides input and oversight of FactSet's employee engagement efforts. In fiscal 2021, the L&D Team implemented "Learning Business Partners" (LBPs) to align learning and development needs with overall business goals. LBPs are HR Professionals and Senior Leaders within the L&D Team who define and address knowledge gaps, positioning FactSet to ensure that, across disciplines, FactSetters are subject matter experts who can adapt quickly to changing environments and new technologies. LBP efforts contributed significantly to the increase in learning hours from fiscal 2020 to fiscal 2021. These additional learning hours supported our key workforce initiatives, including new hire training for and ongoing leadership development programming, empowering our employees with skills to succeed in the future.

Extensive training and development opportunities are also available to support employees in their pursuit of lifelong learning, including certification reimbursement for eligible expenses related to the CFA (additional paid vacation is also offered for CFA), CPIM, CAIA, and FRM exams.

Through annual performance reviews and quarterly check-ins, we ensure that learning and development goals remain current, accurate, and reasonable so that all FactSet employees continue to demonstrate and grow their expertise.

Following an increase in hybrid and remote work arrangements, FactSet expanded its digital learning offerings and boosted overall digital engagement with its employees by close to 370%. FactSet continues to maintain its dedicated "learning hours" each month for employees to set and evaluate individual learning goals and take courses to help achieve those goals. In fiscal 2021, 80% of FactSetters, on average per quarter, engaged in live or asynchronous e-learning sessions on Workday or LinkedIn Learning. FactSet promoted the educational resources available to employees by hosting a Learn-a-thon event in December 2020. Since the Learn-a-thon, FactSet has continued to follow up with additional learning campaigns to spur and support learning opportunities.



## 370%

**engagement boost overall with employees with expanded digital learning offerings**

## LBPs

**The L&D Team implemented "Learning Business Partners" (LBPs)**

## FDS Tech Conference

In fiscal 2021, FactSet hosted an entirely virtual FDS Tech Conference. The 10-day conference was targeted to FactSet developers and engineers around the globe, including talks and panel discussions on current FactSet projects and technologies, external keynote speakers on topics ranging from security threats to industry trends, and facilitated networking sessions. Over 1,800 FactSetters attended the conference, and over 70% of the attendees reported to feel more connected with the engineering community during and after the conference. During the conference, FactSetters had access to Pluralsight, a platform with learning paths and courses authored by industry experts, to enhance technical learning opportunities. While over 80% of attendees felt the conference included content relevant to their role, 90% viewed content unrelated to their role, giving them context and clarity into what is happening in different parts of the organization to which they may not otherwise have access. The conference generated 30,000 hours of learning across the organization.



**30,000  
HOURS**

**of learning  
generated across  
the organization  
by the conference**



## Highlights & Metrics

<b>Training type</b> <b>Continuing Education, Live Training</b> <b>64,732 Hours (fiscal 2021)</b> 33,957 Hours (fiscal 2020)	<b>91% YOY</b>	<b>Training type</b> <b>Continuing Education, Digital Learning</b> <b>94,605 Hours (fiscal 2021)</b> 19,938 Hours (fiscal 2020)	<b>374% YOY</b>	<b>Training type</b> <b>Campus Onboarding Programs</b> <b>131,914 Hours (fiscal 2021)</b> 163,327 Hours (fiscal 2020)	<b>-19% YOY</b>
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Learning Hours	Fiscal 2021	% YoY	Fiscal 2020
<b>Overall</b>	291,251	<b>34%</b>	217,222
Workday Live	26,475	<b>-22%</b>	33,957
Workday Media	33,178	<b>66%</b>	19,938
LinkedIn Learning	61,427	-	-
CSDP	115,949	<b>-8%</b>	126,681
Engineering New Hire	15,965	<b>-56%</b>	36,646
FDS Tech Conference (Live + Streams)	32,004	-	-
Engineering Topicals	1,382	-	-
Analytics + Trading	547	-	-
CTS	325	-	-
Engineering Leadership Development	3,240	-	-
Sales Program	759	-	-
<b>Average Hours</b>	26	<b>29%</b>	20

## Planned Initiatives

Given the importance of technical learning, FactSet is increasing technical learning investment by expanding our presence on Pluralsight, a platform with learning paths and courses authored by industry experts, to enhance technical learning opportunities. With Pluralsight's best-in-class content, FactSetters will have access to hands-on labs, instructor-led training, Skill IQs, and targeted learning paths.

## Community and Volunteerism

FactSet continues to invest in local communities through its Corporate Responsibility program, uniting around our four Pillars of Service: Inspire Tomorrow's Engineers, Educate to Elevate, Protect Our Environment, and Alleviate Food Insecurity. As described by James Mitchell, FactSet's 2021 Volunteer of the Year, "FactSet's Corporate Responsibility program provides a fantastic opportunity to leverage FactSetters' skills and knowledge to help others. Working with social mobility charities hosting workshops on professional skills for young people has been a highlight of my professional career."

During fiscal 2021, FactSet offered an entirely virtual employee volunteer program by transitioning to remote mentoring and other educational support programs, as well as offering new virtual learning and engagement opportunities for young people. In total, FactSet delivered 263 volunteer events globally in 20 countries and 32 FactSet locations. FactSet employees and volunteers served nearly 11,000 volunteer roles and over 14,000 total volunteer hours.

Laura Ruhe, Senior Vice President, Corporate Responsibility, reflected on the impact of FactSet's Corporate Responsibility program, "In the past year, FactSet deepened our global commitment to our charity partners who are supporting those most impacted by the ongoing pandemic. Our talented employees dedicated their time volunteering around our ongoing commitment to technology education for young women and underrepresented people, improving nutrition for food—insecure students, job readiness support, and supporting environmental projects. I remain inspired by the passion and resulting impact our employees have made to improve the lives of so many people."

“

**I remain inspired by the passion and resulting impact our employees have made to improve the lives of so many people.**

”



**Laura Ruhe**  
Senior Vice President,  
Corporate Responsibility

Through global campaigns with strategic nonprofit partners, FactSetters achieved far-ranging impacts. During fiscal 2021, FactSet supported the community by:

- Assisting over 80,000 young people to gain qualifications, higher education, or employment
- Providing over 1 million meals to people in need
- Enabling the planting of over 14,000 trees
- Creating over 100,000 data points to support environmental research and disaster relief

All FactSet grants are made on the provision that the charity does not discriminate by race, creed, gender, gender identity, sexual orientation, age, religion, or national origin.



## Inspire Tomorrow's Engineers

One of FactSet's four pillars of service is to Inspire Tomorrow's Engineers. The aim of this pillar is to give young people from a variety of diverse backgrounds the skills and experience needed to become future science and technology leaders. By working with education and social mobility nonprofits and charitable organizations, including [America on Tech](#), [CodeDoor](#), and [upReach](#), FactSet helps young people build engineering skills and move into the tech industry. In fiscal 2021, Inspiring Tomorrow's Engineers reached more than 36,000 young people, providing access to educational resources and events, FactSet mentorship, work readiness programming, and practical industry experience. FactSet Chief Technology & Content Officer Gene Fernandez was recognized as a 2021 Innovators and Disruptors Award Winner by America On Tech (AOT). The award celebrates the outstanding achievements of influential leaders in the technological field. Gene has championed FactSet's partnership with AOT as an important strategic partner to advance equity and inclusion in technology. "The real-world, work experience that students gain with AOT is so valuable in helping them see a future working at a company like FactSet," said Gene. "We believe that diverse perspectives are integral for FactSet's ability to innovate and be successful."

FactSet's partnership with upReach in the U.K. helps first-generation university students and those from disadvantaged communities access top-quality graduate employment in finance and technology firms. Launched in 2019, the program has seen graduates move into roles across the industry, including at FactSet's London office.

Levon, a Computer Science graduate, said, "Leading up to the start of my internship with FactSet, I was able to learn from my FactSet mentor who gave me an early insight into how the company worked and operated in the industry. I was even able to network with other employees through my mentor to gain specialist knowledge from engineers in the company, learning about how projects were managed, and problems solved." Following his internship, Levon joined FactSet as a full-time graduate hire, joining a growing group of upReach alumni to join FactSet, Deloitte, Deutsche Bank, Bank of America, Morgan Stanley, Accenture, Salesforce, and Microsoft.

In Germany, FactSet partners with CodeDoor, an organization that helps young people underrepresented in technology, such as refugees and women, into the industry. CodeDoor's practical, project-based learning platform helps learners prepare for careers in technological fields evidenced by the program's success rate of 85% of graduates moving into full-time employment with leading technology companies, including FactSet.



**36,000+**  
**YOUNG PEOPLE**  
reached in fiscal  
2021, by Inspiring  
Tomorrow's  
Engineers



**We believe  
that diverse  
perspectives  
are integral for  
FactSet's ability  
to innovate and  
be successful.**



**Gene Fernandez**  
Chief Technology  
& Content Officer



In the U.S., FactSet’s partnership with America on Tech enables 50 New York City high school students to participate in their Tech Flex Leaders program, a year-long immersive out-of-school-time program for juniors and seniors enrolled in under-resourced schools. The Tech Flex Leaders program embeds weekly computer science and technology classes at local companies, offers mentorship via industry professionals, and provides access to professional internship opportunities. FactSet volunteers provide professional skill-building workshops on topics like career awareness, resume building, and interview skills.

**2021 INNOVATORS AND DISRUPTORS AWARD WINNER**

**CTCO Gene Fernandez recognized by AmericaOnTech**

Every year, Technovation invites teams of girls around the world to learn and apply the skills needed to solve real-world problems through technology. In fiscal 2021, 350 FactSet employees volunteered as Technovation Challenge judges, providing feedback to 1,400 young women on their mobile app projects and encouraging them to continue learning and exploring opportunities in computer science.

⏪ **Hinesh P.  
Helena P.  
Romulo L.  
Sekoya W.**



**Educate to Elevate**



FactSet has built partnerships in line with its second pillar of service, *Educate to Elevate*, to help prepare young people for future careers. FactSet works with one of the world’s largest youth-serving charities, Junior Achievement, in Canada, Hong Kong, Japan, Latvia, India, the Philippines, Singapore, and the United States. FactSet volunteers delivered résumé writing and interview skills workshops, financial literacy talks, and entrepreneurship challenges. FactSet volunteers in the U.K. and U.S. also support TutorMate, a virtual reading support

program that pairs volunteers with children for a weekly tutoring session to read stories and play games that build fluency, comprehension, and reading confidence.



**Protect Our Environment**



In line with the Protect Our Environment pillar of service, in April 2021, FactSet launched Pledge for the Planet, a new sustainability initiative that challenges employees to change habits to reduce their environmental impact. FactSet honored completed challenges by sponsoring tree plantings with the global reforestation charity, One Tree Planted. More than 1,200 FactSetters participated in the campaign, resulting in over 12,000 trees planted, 6.4 million liters of water saved, and more than three tons of carbon dioxide saved. Combined with additional tree planting initiatives, FactSet enabled the planting of more than 14,000 trees in fiscal 2021.

**Alleviate Food Insecurity**

The final pillar of service is to Alleviate Food Insecurity. Each November, FactSet unites to fight hunger in local and global communities. FactSet CEO, Phil Snow, kicked off the campaign in 2021 with a global learning program with Jordan Cox of the UN World Food Programme, which was awarded the 2020 Nobel Peace Prize for their global hunger relief work. As a result of FactSet’s employee fundraising efforts, local volunteer activities, and corporate support, more than 993,000 meals were provided for people in need worldwide. Combined with additional meals donated throughout the year, FactSet provided more than one million meals in fiscal 2021.



**993,000+ MEALS**  
were provided for people in need worldwide



**Hannah B.**

## Year-Over-Year Data

### PARTICIPATION DATA

Fiscal Year	Volunteer Events	Volunteer Roles	Volunteer Hours
2017	163	3,329	9,499
2018	288	5,069	12,913
2019	475	5,079	15,939
2020	347	5,998	12,206
2021	263	10,949	14,398

### IMPACT DATA

Fiscal Year	Young People Gaining Qualification, Moving into Further Education, or Obtaining Employees (Inspiring Tomorrow's Engineers + Elevate to Educate)	Meals Generated	Trees Planted	Data Points Created to Inform Environmental Research or Disaster Relief
2019	870	1,197,004	980	67,393
2020	10,294	1,400,030	1,055	90,040
2021	81,191	1,021,905	14,058	104,452

## Initiatives

On November 11, 2021, FactSet incorporated the FactSet Charitable Foundation as a nonprofit nonstock corporation. A separate legal entity from FactSet, it will be governed by its own Board of Directors but supported by FactSet. The Foundation will play a large role in planning and effectuating our global strategic giving.

# Employee Engagement and Wellbeing

Employee engagement is critical to FactSet's business as it impacts employee retention, productivity, and innovation. FactSet fosters employee engagement in numerous ways, including through our Business Resource Groups, training programs, and our annual employee engagement survey.

FactSet is committed to an annual, anonymous, and confidential global employee engagement survey, to continually improve employee engagement. The survey is administered by a third-party and is used to solicit employees' constructive input on a broad range of topics. Aggregated survey results are reviewed by executive and senior leadership, as well as direct managers. The scores and comments provide insight for management to take timely action to improve our employees' experience and the overall effectiveness of the organization.

We had a response rate of 92% for our fiscal 2021 employee engagement survey, a 6% increase over the fiscal 2020 survey. Additionally, over 10,000 employee comments were shared, signifying that FactSetters continue to have pride in their work, colleagues, and company. Despite the unprecedented year, the survey results revealed increased scores over fiscal 2020 results for all 31 scored questions at the company level. These questions covered wide-ranging topics including, but not limited to, satisfaction with executive leadership, communication, growth, collaboration, and values. The increased satisfaction scores across the board exemplify FactSet's continual progress for improving employee engagement and wellbeing.

## 2021 SURVEY



Employees Shared Over  
**10,000**

comments with positive and constructive feedback



**Achieved a 92% Response Rate,** ensuring that we heard from the majority of FactSetters



**Increased Scores for All 31 Scored Questions**

at the company level



**Our Highest Engagement Score**

Increased overall engagement at the company level and achieved our highest score to date



**Diversity and Inclusion Scored Highest**

along with employees' understanding of how they contribute to FactSet's success

## Global Incident Management Team

In response to the ongoing COVID-19 pandemic, FactSet's highest priority and primary concern has always been, and remains, the health, safety, and wellbeing of FactSet's employees, families, and communities. When initially faced with the pandemic, FactSet implemented its business continuity plan with a dedicated incident management team to respond quickly and effectively to changes in the environment to continue offering clients uninterrupted products, services, and support while also protecting FactSet employees.

During the second wave of COVID-19 infections in India, the Global Incident Management Team worked closely with local management and leadership to accommodate employees in the region to make their lives safer and easier. Some of these accommodations included moving 100% of the workforce in India to remote work until it was absolutely safe to return to the office, providing Interim Emergency Medical Advance funds, enhancing the Group Health Insurance coverage, increasing time off for vaccination, recovery, and bereavement, and instituting flexible hours for employees who needed to take care of their families. Additionally, FactSetters had access to an Information Hotline open 24/7 in India to provide important updates and support regarding COVID-19-related resources both in and outside of FactSet.

Company-wide, FactSet continues to assist employees during this difficult time by offering extensive benefit resources, presenting regular all-company meetings led by the CEO, and sending frequent emails to the employee base. Additionally, throughout fiscal 2021, FactSet conducted global and regional webinars to provide education and support for employees on wellbeing topics including, but not limited to, practicing mindfulness, overcoming burnout, and building resiliency. Internal employee surveys have shown that employees have been very satisfied with the level of communications from management on FactSet's COVID-19 responses and have felt supported by FactSet throughout the pandemic. In fact, the fiscal 2021 engagement survey revealed that overall engagement at the company-level increased to the highest engagement level to date.



**Internal employee surveys have shown that employees have been very satisfied with the level of communications from management on FactSet's COVID-19 responses**

### How We Work - Guide to Flexibility at FactSet

To further support our employees in being their most productive self at work and in their personal lives, FactSet rolled out the How We Work guide to flexible working arrangements. These arrangements preserve the benefit of flexibility while retaining talent, fostering creativity, innovation, collaboration, and enabling mentorship—key drivers behind all employees’ productivity, satisfaction, and success. Furthermore, these provisions support FactSet’s commitment to creating a diverse, equitable, and inclusive workplace, removing barriers to augment our opportunity to attract and retain talent.

Our work arrangements include office-bound working, hybrid working (working an average of two days per week from employee’s designated FactSet office), and working from home.

Additionally, employees whose positions are not aligned to fixed working hours may elect to work a Flextime schedule—working the same number of hours as is considered “standard” in their office location or employment contract, but during different times in the working day.

FactSet’s approach to how we work will provide a framework for improved work-life balance, increased opportunities to focus with fewer distractions, more time to spend with family and friends, reduced commuting time and costs, and higher levels of motivation.

Due to certain legal requirements in Hyderabad and Manila, the How We Work arrangements do not currently apply to employees in those locations and may have limited applicability in some other additional locations due to local laws and other country-specific restrictions. It is, however, our intent to extend the flexibility to all employees globally once local legal requirements allow us the opportunity.

**OUR WORK ARRANGEMENTS INCLUDE:**



**Office-Bound Working**



**Hybrid Working**



**Remote Working**

“To further support our employees in being their most productive self at work and in their personal lives, FactSet rolled out the How We Work guide to flexible working arrangements.”

 **Joseph J.  
Rutuja M.  
Kunal R.  
Faith C.**



## New Health and Wellbeing Offerings

FactSet continues its dedication to supporting the physical, emotional, financial, and social wellbeing of our employees and their families. To support employees' wellness, FactSet's Global Employee Assistance Program (EAP), LifeWorks by Morneau Shepell, helps with almost any issue, whether related to health, family, money, work, or anything in between. Through our Global EAP, employees and their dependents have 24/7, 365 days-a-year access, at no additional cost, to services and assistance from LifeWorks. Through confidential counseling services with LifeWorks advisors, FactSetters are empowered to be productive and successful in all aspects of their lives.

In the U.S., FactSet launched its high quality, affordable Family Building Benefits to provide its employees with support for some of life's most significant transitions: starting a family, navigating pregnancy, and balancing life as a working parent. In fiscal 2021, fertility benefits were expanded through Progyny, a leading fertility and family building benefits solution that combines clinical and emotional guidance and support with the latest science and technology. Progyny's all-inclusive comprehensive and effective solution improves clinical outcomes and shortens time to pregnancy. For further family-building support, FactSet offers its employees three mobile apps—Fertility, Pregnancy, and Parenting—through Ovia Health, a best-in-class digital maternity and family benefits solution. The apps provide access to expert content and tips, personalized health insights, data-driven support, on-demand health coaching with Registered Nurses, and stage-specific support. Recognizing the unique challenges associated with adoption and surrogacy, financial assistance, support, and guidance for adoption and surrogacy is also provided to all employees.

In fiscal 2021, fertility benefits were expanded through Progyny, a leading fertility and family-building benefits solution that combines clinical and emotional guidance and support with the latest science and technology.



## Initiatives

FactSet convened its first Sustainability Committee in October 2021 and organized five sustainability subcommittees, one of which is an Employment, Total Rewards, and Training Subcommittee. This subcommittee will advance FactSet's employee-focused initiatives, including tying compensation to ESG performance and conducting a global gender pay gap review. These action items are a direct response to the engagement survey results, which indicated that compensation clarity and transparency should be a company-wide focus area. The other four sub-committees likewise address the other highest priority areas shown by the engagement survey results. FactSet wants our employees to be passionate about what they do and enjoy their work, so we will continue to offer ample opportunities to measure employee satisfaction and boost employee engagement.

SECTION

4

# Governance

- By the Numbers
- Data Privacy and Security
- Business Ethics
- ESG Investing Solutions

# GOVERNANCE

## BY THE NUMBERS

### TRUVALUE LABS

Full integration of Truvalue Labs, a FactSet Company

## 98.9%

### OF FACTSETTERS

In fiscal 2021 completed training on FactSet's Code of Business Conduct and Ethics



### ACCESS SCORES

Clients can access scores based on Sustainability Accounting Standards Board (SASB) Standards and the United Nations Sustainable Development Goals (SDGs)



### “PLAN-DO-CHECK-ACT” METHODOLOGY

adopted based on an annual cycle of strategic planning, periodic internal and third-party assessments, and measured execution of targeted initiatives



### NEW POLICY

Adopted a new Gifts and Entertainment Policy



### SECURITY TRAINING

provided to 100% of FactSet employees



## Data Privacy and Security

Keeping data private and secure for our clients is a top priority at FactSet. Programs or policies that can be implemented to improve the privacy and security of our data are among the most material topics for our company and its stakeholders. FactSet has developed a comprehensive global information security and governance framework aligned with industry best practices. This framework and its underlying controls are designed to ensure that FactSet client data is only accessed by authorized FactSet employees with a justified business need, that such data is not disclosed or modified without client authorization, and that applicable legal and regulatory requirements are met. Information Security training is provided to all FactSet employees to facilitate ongoing education and awareness. All suspected security breaches and potential weaknesses are reported to, investigated, documented, and resolved by our internal security team.

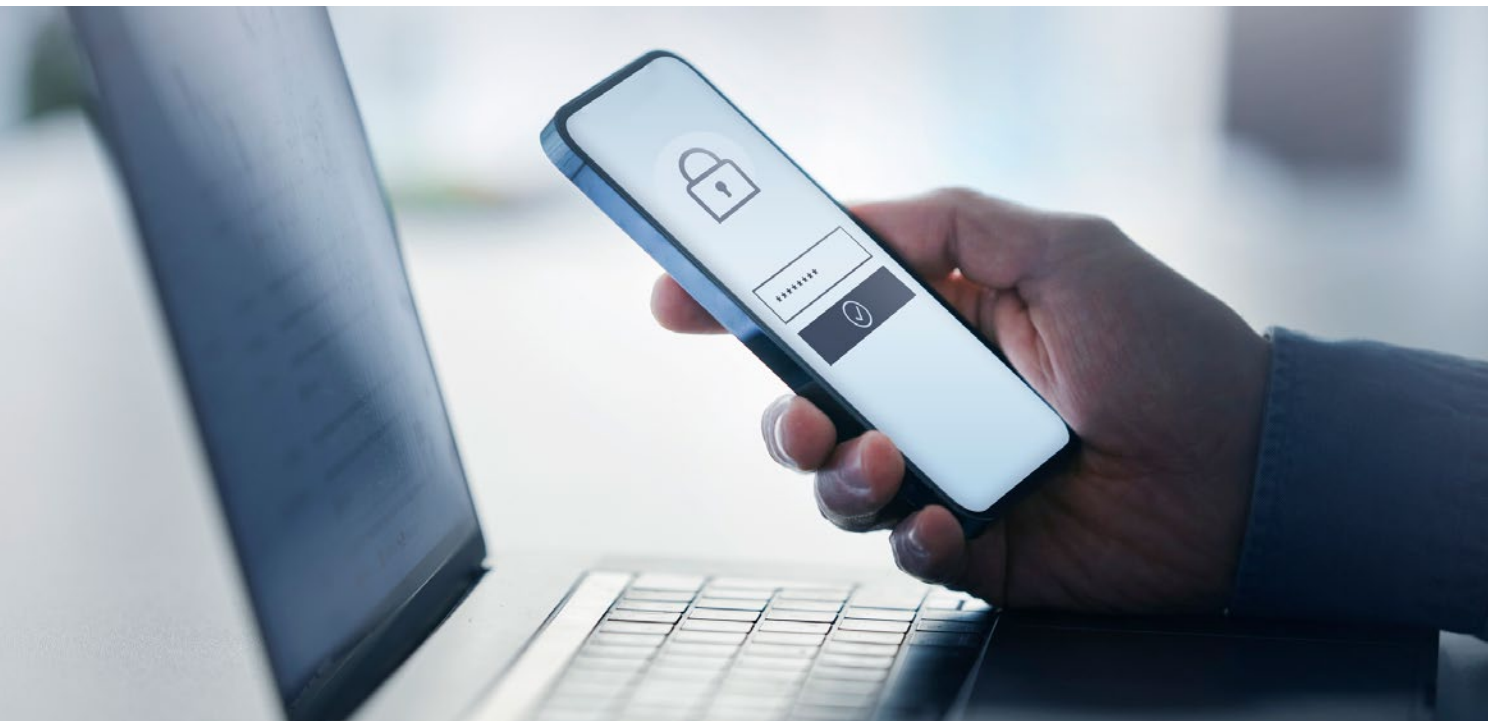
FactSet adopted an expanded Plan-Do-Check-Act methodology based around an annual cycle of strategic planning, periodic internal and third-party assessments, and measured execution of targeted initiatives. FactSet implemented the National Institute of Standards and Technology (NIST) Cybersecurity Framework in combination with ISACA Capability Maturity Model Integration (CMMI), and the Open-Source Architecture (OSA) for both capability measurement and further granularity and control prioritization.

We conduct annual risk assessments to identify, assess, and prioritize our top risks. We assign owners to each top risk and those owners are responsible for mitigating and managing their risks and reporting on them to the appropriate risk committee. We also identify, assess, prioritize, manage, mitigate, and report on emerging risks.



**N.I.S.T.**

**FactSet  
implemented the  
National Institute  
of Standards and  
Technology (NIST)  
Cybersecurity  
Framework**



## Enterprise Risk Management (ERM)

The Enterprise Risk Management (ERM) program is designed to identify, prioritize and assess the top risks and uncertainties that could impact FactSet's strategic objectives, including data security, human capital, legal and regulatory, reputational, and financial risks. ERM activities include conducting enterprise risk assessments to better understand risk exposures and capability needs; overseeing the development of risk mitigation and business action plans; and monitoring and reporting on top risks to the Executive Leadership Team (ELT) and the Board of Directors. This year, FactSet worked with an external consulting team to complete a comprehensive review of our ERM processes and make recommendations to enhance program capabilities. An updated ERM policy and program framework will be adopted and implemented in fiscal 2022.

## Information Security Risk Committee (ISRC)

The ISRC is comprised of a diverse group of executives, including the Chief Information Security Officer and various other senior IT executives. The role of the ISRC is to provide oversight for cyber risk and inform policies and practices for FactSet.

Additionally, to manage and mitigate risks, FactSet maintains a Business Continuity Plan (BCP) that covers situational disasters affecting corporate and employee interests as well as client-facing services. Tabletop and actual exercises are performed regularly as part of the BCP. All employees receive Security Awareness training, and there are advanced role-specific training programs for secure architecture and design principles.

FactSet has multiple SOC2 audits performed covering the trust principles of Security, Availability and Confidentiality, and Processing Integrity to ensure organizational controls and practices are in line with best practices.

To ensure that we manage and mitigate all security risks and concerns, FactSet established several teams and committees. These include:

- **Product and Application Security Team**

This team performs implementation security reviews, penetration testing, application threat modeling, and manages the implementation of security controls in FactSet's Continuous Integration/Continuous Development pipeline. This team is also responsible for defining, measuring, and representing our first-party vulnerability posture at FactSet and driving the appropriate remediation.



- **Vulnerability Management Team**

This team performs internal system and third-party application vulnerability assessments on an ongoing basis. FactSet also has external vulnerability assessments and penetration tests performed by a third party on a regular basis. The risk ratings of findings are classified using a combination of Common Vulnerability Scoring System scores and other internal business metrics. Findings are remediated commensurate with the respective risk rating. FactSet's Risk Management Policy includes severity-based escalation requirements to ensure proper management-level visibility and evaluation of risk issue items, regardless of the source of that risk.

FactSet measures the effectiveness of its Data Privacy program by monitoring:

- data privacy concerns raised through the Whistleblower hotline and other reporting channels;
- data privacy and information security risks identified and monitored through the ERM program;
- data privacy concerns identified through an annual, company-wide compliance awareness survey; and
- employees' completion of periodic data privacy and information security training.

## Business Ethics

As part of FactSet's stakeholder engagements and materiality assessment, business ethics was identified as one of the most material topics for the business and our stakeholders. All FactSet employees are expected to adhere to the highest standards of business ethics and to act with integrity in their daily work activities. Accordingly, we continually advance education and awareness in this area to align with industry best practices and ensure that FactSet's business operations comply with applicable laws and regulations. To uphold these commitments, FactSet has adopted a Code of Business Conduct and Ethics (the "Code") that applies to all FactSet directors, officers, employees, contractors, and suppliers. To ensure everyone understands their responsibilities under the Code, all employees, directors, and officers complete periodic training on the Code and sign an annual Personal Commitment Statement acknowledging their obligation to abide by the principles detailed in the Code.

The Code fosters a culture of compliance and provides guidance on how to conduct business ethically and with integrity. The Code and FactSet's related policies outlines policy the company's expectations in a number of risk areas, including:

- **Anti-Bribery and Anti-Corruption**

As a signatory of the United Nations Global Compact and the United Nations Principles for Responsible Investment, we are committed to combating corruption in all its forms, including extortion and bribery. Employees may not offer gifts or entertainment in an attempt to obtain or retain business by improper means.

- **Conflicts of Interest**

Employees must avoid actual and potential conflicts of interest. A conflict situation may arise when an employee takes actions or has interests that may make it difficult to perform their work at FactSet objectively and effectively. Employees are encouraged to seek clarification of, and discuss questions about, potential conflicts of interest with FactSet's Chief Compliance Officer.

- **Gifts and Entertainment**

The Code sets forth guidelines for giving and receiving business gifts, meals, services, and entertainment. Business gifts and entertainment are designed to build goodwill and sound working relationships among business partners. Employees are proscribed from accepting gifts or entertainment that may be deemed to affect their judgment or actions in the performance of their duties. More detail on how FactSet supports its employees in navigating gifts and entertainment is detailed in the Code linked below.

# 87%

**Between 2018 and 2020, 87% of enrolled workers completed the Anti-Bribery & Corruption Basics course**

# 88%

**completed the Burst Ethics Street Bribery and Corruption course**

- **Money Laundering**

FactSet will not support, facilitate, or condone money laundering and will help governments prevent illegal trade involving our products. FactSet encourages all employees, particularly those with client contact, to “Know Your Customer” to ensure that FactSet only does business with firms that share our standards for compliance and integrity. “Know Your Customer” involves the following:

- Assessing the integrity of potential clients;
- Communicating with clients about our compliance expectations;
- Continuously monitoring clients’ business practices;
- Refusing to do business with or provide assistance to those clients suspected of wrongdoing; and
- Reporting any suspicious transactions or activities by any client to management and the Legal Department.

- **Equal Opportunity and Fair Treatment**

At FactSet, we know that our employees are the foundation of our success. We are committed to building an equitable and inclusive work environment where individuals of all backgrounds are respected, recognized, and rewarded for the diverse talents they bring to FactSet. Hostility, bullying, offensive conduct, illegal discrimination, and harassment will not be tolerated. Individuals who engage in such behaviors are subject to disciplinary action up to and including termination of employment.

FactSet’s Code of Business Conduct and Ethics helps all employees navigate the complex and challenging business environment in which we operate, and ensures that integrity is at the forefront of each business interaction. For more information, including additional commitments, see the [Code of Business Conduct and Ethics](#).

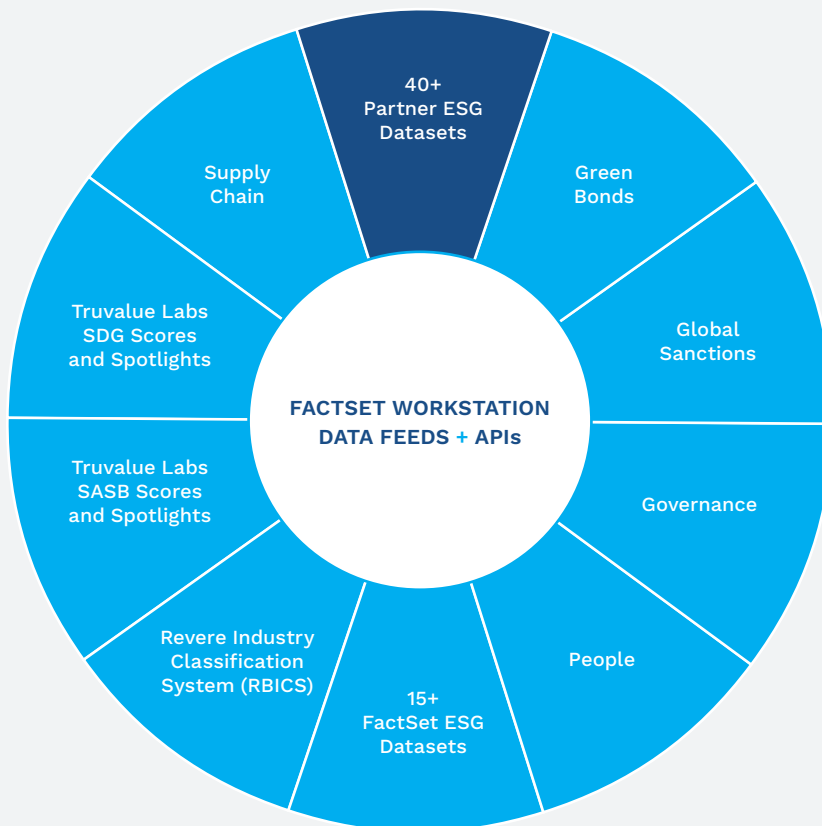
In addition to general training on the Code, FactSet employees receive regular training on several key risk areas including anti-discrimination and harassment prevention, information security, data privacy, and preventing corruption and bribery.

Employees are encouraged to raise concerns and report suspected policy violations to a supervisor, HR Business Partner, FactSet attorney, or member of the Compliance team. In addition, FactSet maintains the [Ethics Action Line](#), a whistleblower helpline and web portal where reports can be made 24 hours a day, seven days a week, anonymously if preferred (where consistent with local laws). All concerns raised in good faith are carefully reviewed, investigated, and addressed appropriately. FactSet prohibits retaliation against any individual for making a complaint in good faith or for assisting in the investigation of a complaint made by someone else.

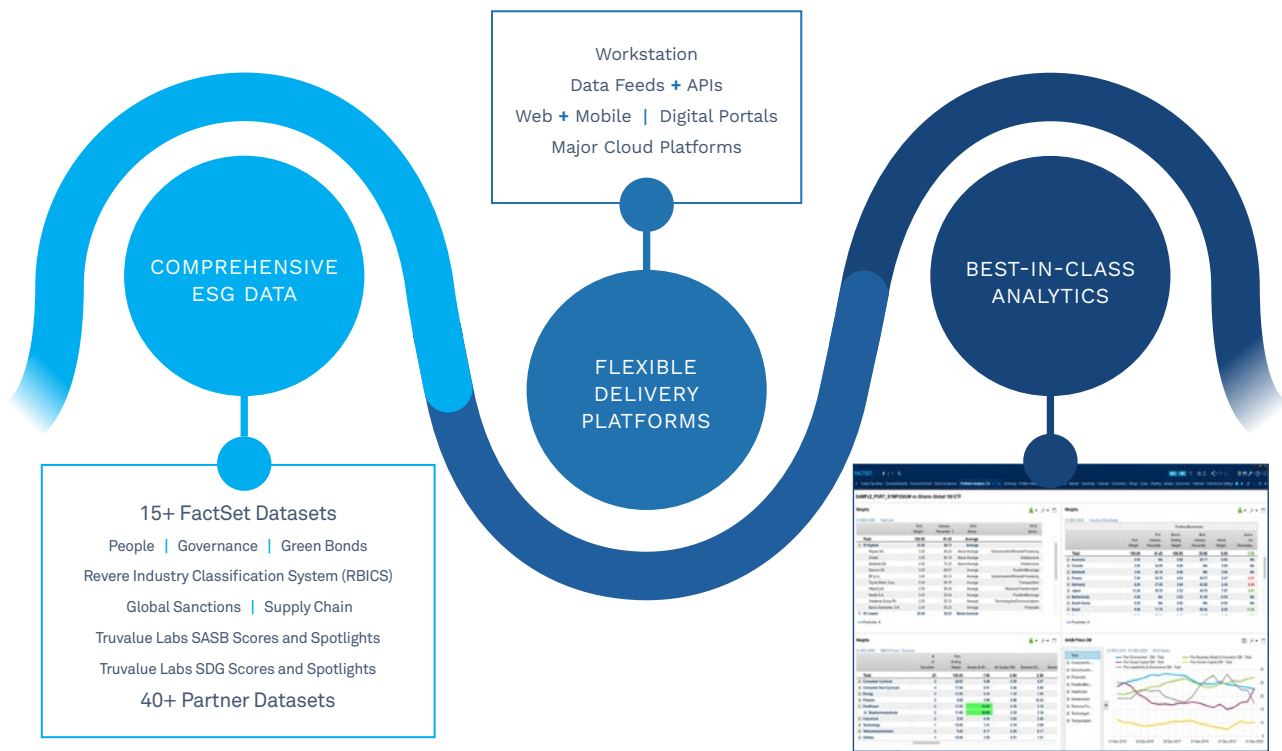
FactSet also has a Code of Conduct for our suppliers that outline requirements regarding business ethics in our supply chain. Suppliers may not engage in bribery, corruption, embezzlement, extortion, or other illegitimate, illegal, and unethical business practices. Suppliers must avoid unlawful agreements or arrangements with their competitors and comply with applicable competition laws. FactSet will not support, facilitate, or condone money laundering by suppliers and will help governments prevent illegal activities involving FactSet. For more information, see our [Supply Chain Code of Conduct](#).

# ESG Investing Solutions

At FactSet, we not only push ourselves to improve our own sustainability and ESG performance, but we offer products that help our clients do the same. FactSet's [ESG investing solutions](#) allow our clients to integrate ESG into portfolio analysis, portfolio construction, risk management, and multi-asset class reporting using data, research, and analytics for all phases of their portfolio lifecycle.



FactSet makes it easy for our clients to satisfy the rapidly increasing demand for sustainable investment decisions and identification of material risks. Clients can quickly identify the most critical and material ESG impacts and incorporate an external perspective on company ESG performance with our award-winning AI and machine-learning technology. Given the ever-changing ESG landscape, our clients can rely on millions of monthly signals to keep pace with market-moving issues, engage more effectively with portfolio companies, and detect potential ESG controversies before they are announced. Through our ESG product offerings, FactSet is leading the charge in driving progress toward sustainability by making ESG data easily accessible for internal decision-making and investing.



→ The pandemic has uncovered risks and opportunities for ESG investing, and our [ESG products](#) allow our clients to access the most up-to-date information as they navigate the evolving landscape. COVID-19 remains a high priority factor in financial decisions, which has heightened the need for access to quality ESG data to make the most informed decisions possible.

[Truvalue Labs](#), which was fully integrated with our products in fiscal 2021, provides access to important ESG data. By integrating this content more tightly with our platform throughout the year, we provide invaluable insights into investment decisions with an ESG lens. Clients can access scores based on Sustainability Accounting Standards Board (SASB) Standards and the United Nations Sustainable Development Goals (SDGs) to:

- Identify, manage, and communicate both financially-material and industry-specific sustainability information
- Monitor material ESG issues that could impact portfolio value, reduce blind spots, and better manage risk using Truvalue Labs SASB data
- Create proprietary ESG composite scores by incorporating Truvalue’s timely, objective data from a third-party stakeholder perspective into the ESG research process
- Write personalized research and easily track engagement with other companies on specific aspects of ESG materiality
- Better understand the impact of portfolio companies by measuring positive and negative alignment to the SDGs
- Streamline reporting with more than 13 years of scores and events tied to the SASB framework
- Experience deeper precision and granularity when reporting on revenue exposure to products and services that align with the SDGs using our Revere Industry Classification System (RBICS)

## Initiatives

ESG regulation evolves rapidly and shifts ESG reporting from a voluntary exercise to a mandatory obligation. The EU Sustainable Finance Disclosure Regulation (SFDR) has introduced detailed rules for how financial market participants need to disclose sustainability. To stay ahead of the curve, our ESG products and solutions will continue to expand to meet these needs, allowing our clients to simplify their compliance with these new and developing regulations:

- Navigate rapidly changing ESG regulations with best-in-class portfolio analytics, efficient reporting tools, and a knowledgeable team of regulatory experts
- Ensure compliance with new disclosure and reporting obligations from the SFDR for both Principal Adverse Impacts (PAIs) and alignment with the EU Taxonomy
- Leverage mandatory and additional PAI indicators to facilitate reporting on the impacts of financial products within the EU
- Save time by leveraging our unique content to help with managing eligibility criteria, minimum safeguards, and the EU Sustainable Finance Do No Significant Harm (DNSH) principle



## SECTION

## 5

# Appendix

**About This Report**

FactSet Research Systems Inc. has reported in accordance with the GRI Standards for the period September 1, 2020 to August 31, 2021. These new standards improve on previous iterations of the framework to reflect global best practices and improve the quality of disclosures and highlight sector-specific impacts. The information disclosed herein has been reviewed by FactSet's executive and legal teams.

GRI Content Index

GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/SDG																											
General Disclosures																														
2-1	Organizational Details	<p><b>Legal name:</b> FactSet Research Systems Inc.</p> <p><b>Nature of ownership:</b> Publicly traded</p> <p><b>Headquarters location:</b> Norwalk, Connecticut</p> <p><b>Countries of operation:</b> As of August 31, 2021, we had 37 offices across 20 countries with 10,892 employees</p>																												
2-2	Entities included in the organization's sustainability reporting	FactSet and all its subsidiaries																												
2-3	Reporting period, frequency, and contact point	<p><b>Sustainability reporting period:</b> September 1, 2020 – August 31, 2021 The financial reporting period aligns with the sustainability reporting period</p> <p><b>Frequency of sustainability reporting:</b> Annual</p> <p><b>Report Publication Date:</b> March 2022</p> <p><b>Contact point for any questions:</b> <a href="mailto:sustainability@factset.com">sustainability@factset.com</a></p>																												
2-4	Restatements of information	There are no restatements of information made from previous reporting periods																												
2-5	External assurance	<a href="#">External assurance has been obtained for FactSet's GHG inventory (p. 17)</a>																												
2-6	Activities, value chain and other business relationships	Active in the Professional and Commercial Services sector, FactSet creates flexible, open data and software solutions for more than 160,000 investment professionals around the world, providing anytime, anywhere access to financial data and analytics that investors use to make crucial decisions																												
2-7	Employees	<table border="1"> <thead> <tr> <th>Region</th> <th># Employees</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Americas</td> <td>2,439</td> <td>22%</td> </tr> <tr> <td>Asia Pacific</td> <td>7,080</td> <td>65%</td> </tr> <tr> <td>EMEA</td> <td>1,373</td> <td>13%</td> </tr> <tr> <td>Total</td> <td>10,892</td> <td>100%</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Gender</th> <th># Employees</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Men</td> <td>6,699</td> <td>61.5%</td> </tr> <tr> <td>Women</td> <td>4,193</td> <td>38.5%</td> </tr> <tr> <td>Total</td> <td>10,892</td> <td>100%</td> </tr> </tbody> </table> <p><a href="#">2021 Form 10-K (p. 13)</a></p>	Region	# Employees	Percentage	Americas	2,439	22%	Asia Pacific	7,080	65%	EMEA	1,373	13%	Total	10,892	100%	Gender	# Employees	Percentage	Men	6,699	61.5%	Women	4,193	38.5%	Total	10,892	100%	<p><b>SASB:</b> SV-PS-000.A</p> <p><b>SDG 8:</b> Decent Work and Economic Growth</p> <p><b>SDG 10:</b> Reduced Inequalities</p>
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GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/SDG														
<b>General Disclosures</b>																	
<b>2-8</b>	Workers who are not employees	<table border="1"> <thead> <tr> <th>Region</th> <th># Workers</th> </tr> </thead> <tbody> <tr> <td>Americas</td> <td>114</td> </tr> <tr> <td>Asia Pacific</td> <td>13</td> </tr> <tr> <td>EMEA</td> <td>85</td> </tr> <tr> <td>India</td> <td>233</td> </tr> <tr> <td>Philippines</td> <td>18</td> </tr> <tr> <td>Total</td> <td>463</td> </tr> </tbody> </table> <p>The above numbers represent the head-count at the end of fiscal 2021. For workers that are not employees, the emphasis is on seasonal supplemental work in corporate groups, but the bulk of the contingent workers are for project-based work in product and technical groups. These numbers remain fairly stable on a rotating basis throughout the reporting period.</p>	Region	# Workers	Americas	114	Asia Pacific	13	EMEA	85	India	233	Philippines	18	Total	463	<b>SASB:</b> SV-PS-000.A
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Americas	114																
Asia Pacific	13																
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<b>2-9</b>	Governance structure and composition	<a href="#">2021 Proxy Statement (p. 8-17)</a>	<b>SDG 5:</b> Gender Equality <b>SDG 16:</b> Peace, Justice, and Strong Institutions														
<b>2-10</b>	Nomination and selection of the highest governance body	<a href="#">2021 Proxy Statement (p. 23-24)</a>	<b>SDG 5:</b> Gender Equality <b>SDG 16:</b> Peace, Justice, and Strong Institutions														
<b>2-11</b>	Chair of the highest governance body	Robin A. Abrams, one of FactSet’s independent directors, has served as Board Chair since June 23, 2020.  <a href="#">2021 Proxy Statement (p. 8)</a>	<b>SDG 16:</b> Peace, Justice, and Strong Institutions														
<b>2-12</b>	Role of the highest governance body in overseeing the management of impacts	Our CEO, along with our Board of Directors, is responsible for all business, operations, and risks of the company, including oversight of climate-related issues as they are integrated into the business, operations, and risks of FactSet.  The Nominating and Corporate Governance Committee of the Board of Directors of FactSet is responsible for recommending nominations of directors and committee memberships and for taking a leadership role in defining and articulating the corporate governance principles and practices of FactSet. The Committee assists the Board in overseeing the company’s position on ESG impacts and public issues of significance that affect key stakeholders of the company, including the environment.  In assessing management’s methods of optimizing stockholder value, the Board must also take into consideration other interested stakeholders, including employees, clients and vendors, as well as compliance with applicable law.  The Board reviewed the effectiveness of our processes for overseeing our impacts for the first time in 2021 and we anticipate reviews at least every two years going forward.	<b>SDG 16:</b> Peace, Justice, and Strong Institutions														

GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/ SDG
General Disclosures			
2-13	Delegation of responsibility for managing impacts	The Enterprise Risk Management (ERM) team is responsible for annually identifying and assessing key risk areas for the company, continuously monitoring risk areas for further developments, and reporting annually to our Board of Directors on risk identification, prioritization, and mitigation efforts. The risk identification process includes interviews of our senior leaders, surveys of our employees, and the review of internal processes, controls, and records.	<b>SDG 16:</b> Peace, Justice, and Strong Institutions
2-14	Role of the highest governance body in sustainability reporting	The Board of Directors oversees our ESG principles and implementation strategies while delegating day-to-day approval to the Executive Leadership Team. Direction is then provided to the Sustainability Committee for implementation. Each subcommittee of the Sustainability Committee meets at least once per month and routinely reports out to the Sustainability Committee, which also monitors the publication and dissemination of relevant sustainability reports and information.	
2-15	Conflicts of interest	Our Conflicts of Interest Policy prohibits board memberships, direct investment or controlling stakes in business partners, and related party transactions that do not comport with applicable laws. Conflicts of interest disclosures are made annually by FactSet's Board of Directors, and there is an escalation policy to review and approve any Related Party Transactions. More information is available in the <a href="#">FactSet Code of Business Conduct &amp; Ethics</a> .	<b>SDG 16:</b> Peace, Justice, and Strong Institutions
2-16	Communication of critical concerns	Our Audit Committee Charter states that the Audit Committee oversees and is responsible for compliance concerns and enterprise risks. The FactSet Ethics Action Line provides for reporting critical concerns of any nature, along with an internal process to review, escalate, and address concerns.	<b>SDG 16:</b> Peace, Justice, and Strong Institutions
2-17	Collective knowledge of the highest governance body	Presentations on economic, environmental, and social topics are given to the Board of Directors as needed.	
2-18	Evaluation of the performance of the highest governance body	Under the Nominating and Corporate Governance Committee's guidance, all directors evaluate their performance as a director over the course of the fiscal year. The Committee also assists the Board in reviewing its effectiveness over the preceding fiscal year. The Committee assesses the overall quality of the material provided to the Board and the presentations made to the Board at least once each year.	
2-19	Remuneration policies	<a href="#">2021 Proxy Statement (p. 34-55)</a>	
2-20	Process to determine remuneration	<a href="#">2021 Proxy Statement (p. 41-42)</a>	
2-21	Annual total compensation ratio	CEO Pay Ratio = 358:1 <a href="#">2021 Proxy Statement (p. 64)</a>	

GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/SDG
General Disclosures			
2-22	Statement on sustainable development strategy	<a href="#">Letter from CEO (p. 06)</a>	
2-23	Policy commitments	UN Global Compact, UN Principles for Responsible Investment (PRI)	SASB SV-PS-510a.1
2-24	Embedding policy commitments	FactSet's policy commitments are realized through our sustainability subcommittees that are responsible for the implementation of the related operational procedures. The subcommittees report out to the executive-lead Sustainability Committee, which has oversight by the Executive Leadership team and the Board of Directors.	
2-25	Processes to remediate negative impacts	<a href="#">FactSet Code of Business Conduct &amp; Ethics</a>	
2-26	Mechanisms for seeking advice and raising concerns	Employees are encouraged to seek advice and raise concerns by contacting FactSet's Chief Compliance Officer either directly or via one of several dedicated addresses or any member of the Legal or Human Resources Departments. In addition, the Ethics Action Line is a telephone, text, and web portal that can be used by anyone, both inside and outside the organization. Information on the Ethics Action Line is included on FactSet's intranet and in the <a href="#">FactSet Code of Business Conduct &amp; Ethics</a> , which is publicly available. The Ethics Action Line website is also listed in the Supplier Code of Conduct, which is also located on the public website.	SDG 16: Peace, Justice, and Strong Institutions
2-27	Compliance with laws and regulations	FactSet's Code of Business Conduct and Ethics and its related internal policies require compliance with all applicable laws and regulations around the world. Employees are required to report suspected misconduct, including any violation of law or regulations, either directly to the Legal or Compliance Departments or via the Ethics Action Line. The Compliance team investigates all allegations of legal violations, and any confirmed violations are reported to the Audit Committee of the Board of Directors, as appropriate.	SASB SV-PS-510a.2
2-28	Membership associations	Human Rights Campaign Business Coalition for the Equality Act; Management Leadership for Tomorrow's Black Equity at Work; UN Global Compact	
2-29	Approach to stakeholder engagement	<a href="#">Corporate Governance Guidelines (p. 5)</a> <a href="#">Stakeholder Engagement (p. 10)</a>	
2-30	Collective bargaining agreements	As of August 31, 2021, 460 of our employees were represented by mandatory works councils within certain of our French and German subsidiaries <a href="#">2021 Form 10-K (p. 9)</a>	SDG 8: Decent Work and Economic Growth

GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/SDG
<b>Material Topics</b>			
<b>3-1</b>	Process to determine material topics	Our materiality was established using a double materiality approach, which recognizes that businesses should report both internal impacts (topics that influence enterprise value) and external impacts (topics that impact the overall economy, society, and environment) ( <a href="#">p. 11</a> )	
<b>3-2</b>	List of material topics	Carbon Emissions; Climate Risk Management; Human Capital Development; Diversity, Equity, and Inclusion; Employee Engagement; Corporate Governance; Data Privacy and Security; Business Ethics; ESG Products	
<b>Anti-Corruption</b>			
<b>205-1</b>	Operations assessed for risks related to corruption	FactSet conducts regular risk assessments as part of its Enterprise Risk Management and internal audit activities. These risk assessments cover areas of potential risk, including risk of bribery and corruption. To date, FactSet has not identified significant risk related to corruption	<b>SDG 16:</b> Peace, Justice, and Strong Institutions
<b>205-2</b>	Communication and training	FactSet's Code of Business Conduct and Ethics includes a prohibition of bribery. The Code of Conduct is acknowledged annually by FactSet's Board of Directors, as well as by the Executive Leadership Team and all FactSet employees. FactSet's Anti-Bribery and Corruption Policy and the Gifts & Entertainment Policy are posted on the company's intranet. FactSet's Supply Chain Code of Conduct, which is available to vendors and business partners and is published on our public website, includes a prohibition of bribery	<b>SDG 16:</b> Peace, Justice, and Strong Institutions
<b>205-3</b>	Confirmed incidents of corruption and actions taken	There have been no confirmed incidents of corruption during the reporting period	<b>SDG 16:</b> Peace, Justice, and Strong Institutions
<b>Emissions</b>			
<b>305-1</b>	Direct (Scope 1) GHG emissions	<b>1,306.46 Metric Tons CO2e</b>	<b>SDG 12:</b> Responsible Consumption and Production <b>SDG 13:</b> Climate Action
<b>305-2</b>	Energy indirect (Scope 2) GHG emissions	<b>5,335.90 Metric Tons CO2e</b>	<b>SDG 12:</b> Responsible Consumption and Production <b>SDG 13:</b> Climate Action

GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/SDG
305-3	Other indirect (Scope 3) GHG emissions	FactSet is in the process of estimating indirect emissions for its top 5% of Scope 3 sources and plans to expand this calculation with improved tracking and monitoring	<b>SDG 12:</b> Responsible Consumption and Production <b>SDG 13:</b> Climate Action
305-4	GHG emissions intensity	<b>0.000004 MT CO2e/USD Revenue</b>	<b>SDG 13:</b> Climate Action
305-5	Reduction of GHG emissions	There was a 44% decrease in total emissions (Scope 1 and Scope 2) between fiscal 2020 and fiscal 2021	<b>SDG 13:</b> Climate Action
305-6	Emission of ozone-depleting substances (ODS)	Not applicable based on the nature of FactSet's operations	<b>SDG 12:</b> Responsible Consumption and Production
305-7	Nitrogen oxides (NOx), sulfur oxides (SOx), and other significant air emissions	<b>NOx: 2.99 Metric Tons</b> <b>SOx: 1.85 Metric Tons</b>	<b>SDG 12:</b> Responsible Consumption and Production



GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/SDG
Employment			

**401-1** New employee hires and employee turnover

		Hires	Hire Rate
<b>Gender</b>	Male	1,057	16.0%
	Female	873	21.7%
	Unknown	36	46.2%
<b>Region</b>	Americas	295	12.0%
	Asia Pacific	43	15.6%
	EMEA	168	12.3%
	India	931	22.9%
	Philippines	529	20.9%
<b>Age Group</b>	65+	2	12.9%
	61-64	2	5.3%
	51-60	28	8.5%
	41-50	59	5.8%
	31-40	160	5.1%
	21-30	1,667	27.8%
	Unknown	48	25.3%
<b>Total</b>		1966	18.4%

**SASB**  
SV-PS-330a.2

**SDG 5:**  
Gender Equality

**SDG 8:**  
Decent Work and Economic Growth

**SDG 10:**  
Reduced Inequalities

		Turnover	Turnover Rate
<b>Gender</b>	Male	944	14.3%
	Female	587	14.6%
	Unknown	26	33.3%
<b>Region</b>	Americas	331	13.5%
	Asia Pacific	45	16.4%
	EMEA	155	11.3%
	India	640	15.8%
	Philippines	386	15.2%
<b>Age Group</b>	65+	5	32.3%
	61-64	8	21.1%
	51-60	38	11.5%
	41-50	64	6.3%
	31-40	239	7.7%
	21-30	1,154	19.2%
	Unknown	49	25.9%
<b>Total</b>		1966	14.6%



GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/ SDG
<b>Training and Education</b>			
<b>404-1</b>	Average hours of training per year per employee	26 hours/employee/year	<b>SDG 5:</b> Gender Equality <b>SDG 8:</b> Decent Work and Economic Growth <b>SDG 10:</b> Reduced Inequalities
<b>404-2</b>	Programs for upgrading employee skills and transition assistance programs	In fiscal 2021, 80% of FactSetters, on average per quarter, engaged in live or asynchronous e-learning sessions on Workday Live, Workday Digital, or LinkedIn Learning. Additionally, over 1,800 FactSetters attended FactSet's FDS Tech Conference on engineering and technology. FactSet's Global EAP offers employees a wide spectrum of support, including managing changes at work.	<b>SDG 8:</b> Decent Work and Economic Growth
<b>404-3</b>	Percentage of employees receiving regular performance and career development reviews	100% of eligible workers received a review. Eligible workers are regular employees who started before June 1st 2021 (review was generated on August 3rd).	<b>SDG 5:</b> Gender Equality <b>SDG 8:</b> Decent Work and Economic Growth <b>SDG 10:</b> Reduced Inequalities
<b>Diversity and Equal Opportunity</b>			
<b>405-1</b>	Diversity of governance bodies and employees	<a href="#">DE&amp;I (p. 24)</a>	<b>SASB</b> SV-PS-330a.1 <b>SDG 5:</b> Gender Equality <b>SDG 8:</b> Decent Work and Economic Growth
<b>405-2</b>	Ratio of basic salary and remuneration of women to men	Fiscal 2020 median hourly pay gap of 7.9% for FactSet Europe Limited, and at the time of this report publication, fiscal 2021 pay gap data is being finalized	<b>SDG 5:</b> Gender Equality <b>SDG 8:</b> Decent Work and Economic Growth <b>SDG 10:</b> Reduced Inequalities
<b>Non-Discrimination</b>			
<b>406-1</b>	Incidents of discrimination and corrective actions taken	None	<b>SDG 5:</b> Gender Equality <b>SDG 8:</b> Decent Work and Economic Growth

GRI STANDARD	DISCLOSURE TITLE	RESPONSE/LOCATION	SASB DISCLOSURE/SDG
<b>Freedom of Association and Collective Bargaining</b>			
407-1	Operations and suppliers in which the right to freedom of association and collective bargaining may be at risk	460 employees were covered by collective bargaining agreements; there were no risks to the freedom of association or collective bargaining at FactSet. No other employees are engaged in any activities to enter into additional collective bargaining agreements or other associations.	<b>SDG 8:</b> Decent Work and Economic Growth
<b>Forced or Compulsory Labor</b>			
409-1	Operations and suppliers at significant risk for incidents of forced or compulsory labor	<a href="#">Human Rights Policy (p. 28)</a> <a href="#">U.K. Modern Slavery Act Statement</a> <a href="#">UN GC Principles (p. 12)</a>	<b>SDG 5:</b> Gender Equality  <b>SDG 8:</b> Decent Work and Economic Growth
<b>Local Communities</b>			
413-1	Operations with local community engagement, impact assessments, and development programs	100% of operations have the opportunity to participate in local community engagement. In fiscal 2021, we supported and impacted our communities through: <ul style="list-style-type: none"> <li>• 263 events</li> <li>• 10,949 roles fulfilled</li> <li>• 14,398 hours served</li> <li>• 81,191 young people helped by gaining qualification, higher education, or employment</li> <li>• 1,021,905 meals provided</li> <li>• 14,058 trees planted</li> <li>• 104,452 data points created to support environmental research and disaster relief</li> </ul>	
<b>Customer Privacy</b>			
418-1	Substantiated complaints concerning breaches of customer privacy and losses of customer data	For fiscal 2021, FactSet has not identified any substantiated claims of a breach of customer privacy or any substantiated leaks, thefts, or losses of customer data	<b>SASB</b> SV-PS-230a.3  <b>SDG 16:</b> Peace, Justice, and Strong Institutions



SASB ACCOUNTING METRIC	SASB CODE	RESPONSE/LOCATION
<b>Activity Metrics</b>		
Number of employees by: (1) Full time and part time, (2) temporary, and (3) contract	SV-PS-000.A	10,892 total employees
<b>Workforce Diversity and Engagement</b>		
% of gender and racial/ethnic group representation for executive management	SV-PS-330a.1 (1)	<b>Gender diversity:</b> Men = 73.2% Women = 26.8%  (p. 30)
% of gender and racial/ethnic group representation for all other employees	SV-PS-330a.1 (2)	<b>Gender diversity:</b> Men = 61.5% Women = 38.5%  (p. 30)
Voluntary turnover rate for employees	SV-PS-330a.2 (1)	Overall rate is 14.6%
Employee engagement as a percentage	SV-PS-330a.3	92% of employees responded to the 2021 Glint Engagement Survey

SASB ACCOUNTING METRIC	SASB CODE	RESPONSE/LOCATION
<b>Data Security</b>		
Description of approach to identifying and addressing data security risks	SV-PS-230a.1	<p>FactSet's Product and Application Security team performs implementation security reviews, penetration testing, application threat modeling, and manages the implementation of security controls in FactSet's CI/CD pipeline. This team is ultimately responsible for defining, measuring, and representing our first-party vulnerability posture at FactSet and driving the appropriate remediation.</p> <p>FactSet's Vulnerability Management team performs internal system and third-party application vulnerability assessments on an ongoing basis. FactSet also has external vulnerability assessments and penetration tests performed by a third-party on a regular basis.</p> <p>The risk ratings of findings are classified using a combination of CVSS scores and other internal business metrics. Findings are remediated commensurate to the respective risk rating. FactSet's Risk Management Policy includes severity-based escalation requirements to ensure proper management-level visibility and evaluation of risk issue items, regardless of the source of that risk.</p> <p>FactSet has an Enterprise Risk Management (ERM) program and an Information Security Risk Committee (ISRC). The ERM program is focused on identifying, prioritizing, and assessing key risk areas that have the potential to impact FactSet's strategic business objectives, including data security risks. The ISRC is comprised of a diverse group of executives, including the CISO and various other senior IT executives. The ISRC and the ERM team meet on a regular basis and report periodically to the Executive Leadership Team and the Board of Directors. FactSet conducts annual risk assessments and assigns owners to each top risk who are responsible for mitigating and managing their risks and reporting on them to the ERM team.</p>
Description of policies and practices relating to collection, usage, and retention of customer information	SV-PS-230a.2	<p>Please see FactSet's <a href="#">Privacy Policy</a></p> <p>FactSet's <a href="#">Code of Business Conduct and Ethics</a></p>
Number of data breaches	SV-PS-230a.3(1)	None
Percentage of data breaches involving customers' confidential business information (CBI) or personally identifiable information (PII)	SV-PS-230a.3 (2)	For fiscal 2021, FactSet has not identified any substantiated claims of a breach of customer privacy or any substantiated leaks, thefts, or losses of customer data
Number of customers affected by data breaches	SV-PS-230a.3 (3)	None

SASB ACCOUNTING METRIC	SASB CODE	RESPONSE/LOCATION
Professional Integrity		
Description of approach to ensuring professional integrity	SV-PS-510a.1	All FactSet employees are expected to adhere to the highest standards of business ethics and to act with integrity in their daily work activities. To uphold these commitments, FactSet has adopted a Code of Business Conduct and Ethics that applies to all FactSet directors, officers, employees, contractors, and suppliers
Total amount of monetary losses as a result of legal proceedings associated with professional integrity	SV-PS-510a.2	None

FACTSET