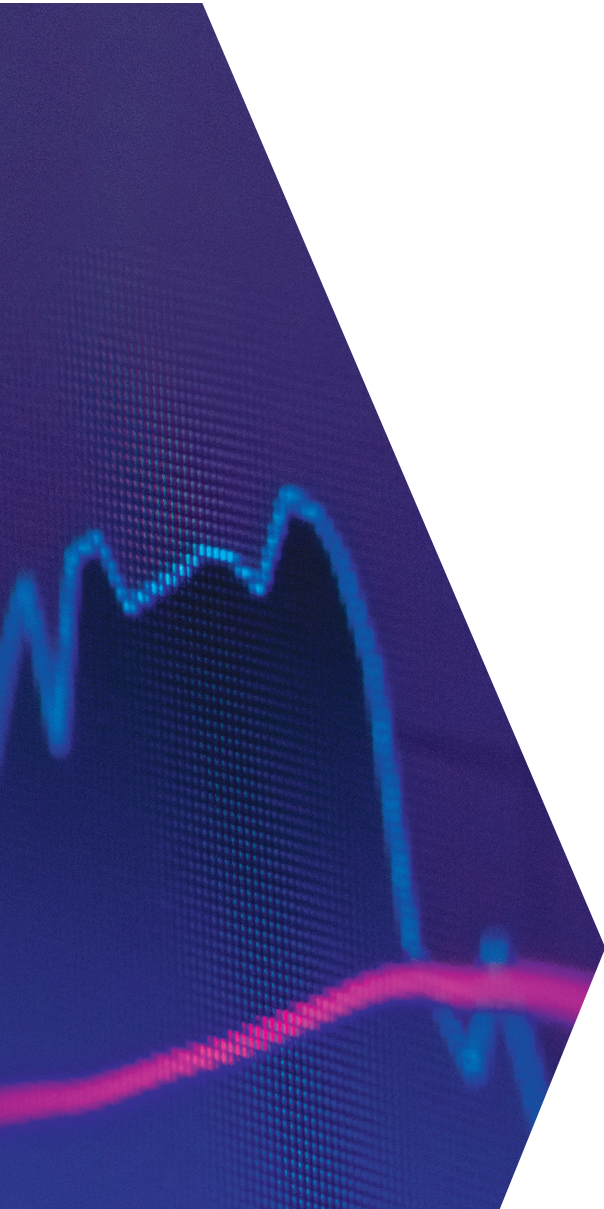


FACTSET › SEE THE ADVANTAGE



› FACTSET CORPORATE
RESPONSIBILITY REPORT

2018





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We are particularly proud of the incredible work that our dedicated colleagues have done in our communities this year, increasing our volunteering events by almost 80% since fiscal year 17.

GETTING INVOLVED IN OUR COMMUNITIES: LETTER FROM PHILIP SNOW

FactSet is celebrating both its 40th anniversary and its 38th year of consecutive revenue growth in fiscal year 19. These achievements are made possible only through the efforts of our talented and dedicated team, which has built a strong record of sustainable growth by committing to serve our clients and our community.

This commitment runs through everything we do and is clear in our company mission: to solve our clients' greatest challenges through the power of collaboration. It is also this commitment that fuels the Corporate Responsibility efforts across our company that I am pleased to share with you in our Corporate Responsibility Report for fiscal year 18. FactSet believes in strong Environmental, Social and Governance (ESG) practices and are proud of the progress we have made over the past year. While we have more to do, our journey is just beginning as we embark on a path to be leaders in this space.

This report details how we manage our global business through our fair and transparent governance processes, equip our staff to uphold the highest standards of ethics, maintain a focus on our greatest asset — our people, and have made a long-term plan to foster a globally inclusive culture across the company. We are particularly proud of the incredible work that our dedicated colleagues have done in our communities this year, increasing our volunteering events by almost 80% since fiscal year 17. In each of our more than 60 global offices, one thing is clear: FactSetters worldwide have a passion for making a positive impact on our business and in our communities.

I hope that you enjoy reading this report as I am immensely proud to share our progress. It is the result of a collective team effort that captures the FactSet spirit of going above and beyond. Our purpose is to serve our clients, and that is what makes FactSet such a strong and sustainable company.

A handwritten signature in black ink that reads "Phil S". The signature is fluid and cursive, with a large, sweeping "S" at the end.

Philip Snow
Chief Executive Officer, FactSet

OUR BUSINESS AT A GLANCE

Our commitment to our clients, employees, shareholders, and communities is at the core of who we are.

Our mission is and always has been to solve our clients' greatest challenges with the power of collaboration. This mission underpins our growth and success as we pursue fiscal year 19 on the back of 38 years of consecutive revenue growth. Few companies can claim this achievement, which is a testament to the hard work and accomplishments of our employees around the world.

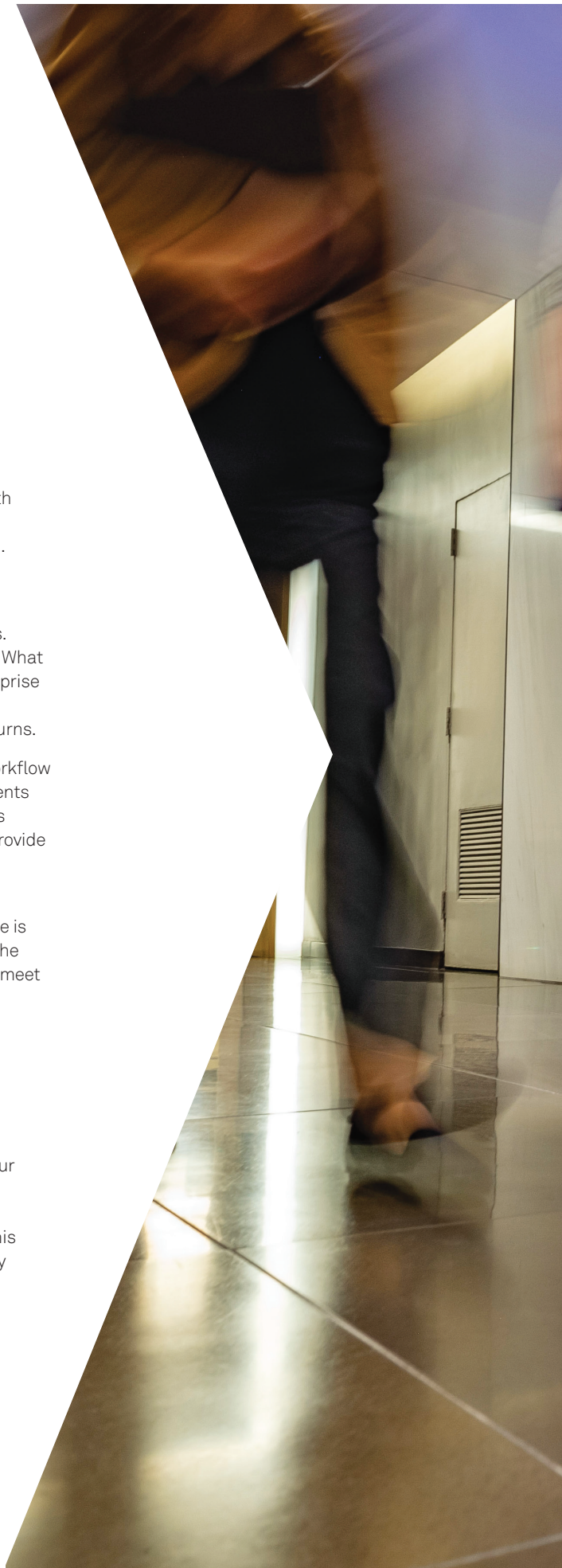
Much has changed since 1978, when FactSet was founded with two employees. Today we are a team of over 9,500 employees in 24 countries around the world. What hasn't changed is our pledge to clients to be the standard for world-class enterprise solutions; our promise to employees to be a career destination for the best and brightest; and our commitment to stockholders to continue to provide solid returns.

We celebrated our 40th anniversary in 2018 and continue our evolution as a workflow company. Our fiscal year 18 was punctuated by many highlights and achievements that will open new markets for us as we look ahead. We deepened relationships with existing clients while adding approximately 400 net new clients. We now provide solutions to over 5,100 firms globally. Along with our product suite, we have an industry-leading client service model and a 95 percent client retention rate.

We are proud of the milestones FactSet has achieved by setting what we believe is the standard for how financial data is delivered, integrated, and consumed by the global investment community. As a recognized leader, we deliver products that meet and anticipate market demands, helping our clients solve tough challenges.

GRI STATEMENT

FactSet Corporate Responsibility Report This document is FactSet's second annual corporate responsibility (CR) report, and covers fiscal year 18, ending August 31, 2018. Our most recent report was published on May 16, 2018. Like our annual report, it includes all FactSet global businesses. This report references the Global Reporting Initiative Sustainability Report Standards. The referenced standards are listed in the GRI Index on page 34 of this report. The content of this report was guided by our ongoing stakeholder engagement efforts. We regularly reach out to investors, employees, clients, and vendors for feedback on our business and their relationship with us. To give feedback on this report, please email csr@factset.com.





FACTSET

38

YEARS OF
CONSECUTIVE
REVENUE GROWTH

9.5K

EMPLOYEES

24

COUNTRIES
AROUND
THE WORLD

400

NEW CLIENTS



**CONTINUING A
LEGACY OF STRONG
GOVERNANCE**



A COMMITMENT TO THE HIGHEST STANDARD OF CORPORATE CONDUCT

Since our founding in 1978, we have been guided by an unwavering commitment to honesty, integrity and transparency. We recognize that our dedication to strong corporate governance is one of our most important assets, and we remain focused on maintaining the highest ethical standards. As FactSet has grown and expanded globally, we have invested in new roles and resources. We have expanded our compliance, security, and legal teams to meet the ever-rising expectations of our employees, shareholders, clients, and regulators to guarantee ethical conduct and compliance with law across our business.

Our Board of Directors remains responsible for ensuring that FactSet continues to advance in line with our values. Of the Board's nine members, seven are independent non-employee directors and three are women. Our two inside directors are CEO Philip Snow, and Chair Philip A. Hadley. Only independent directors sit on the three committees that govern our business. You can find more information about these committees and their charters here:

Our Board is made up of nine members: seven are independent non-employee directors, three of whom are female directors.

7

INDEPENDENT
NON-EMPLOYEE
DIRECTORS

3

FEMALE
DIRECTORS

AUDIT
COMMITTEE

[Read the Charter >](#)

COMPENSATION
AND TALENT
COMMITTEE

[Read the Charter >](#)

NOMINATING
AND CORPORATE
GOVERNANCE
COMMITTEE

[Read the Charter >](#)

EQUIPPING OUR PEOPLE TO UPHOLD THE HIGHEST STANDARDS OF ETHICS

In fiscal years 18 and 19 we developed a new *Mutual Respect in the Workplace* live training which we are rolling out to all of our employees.

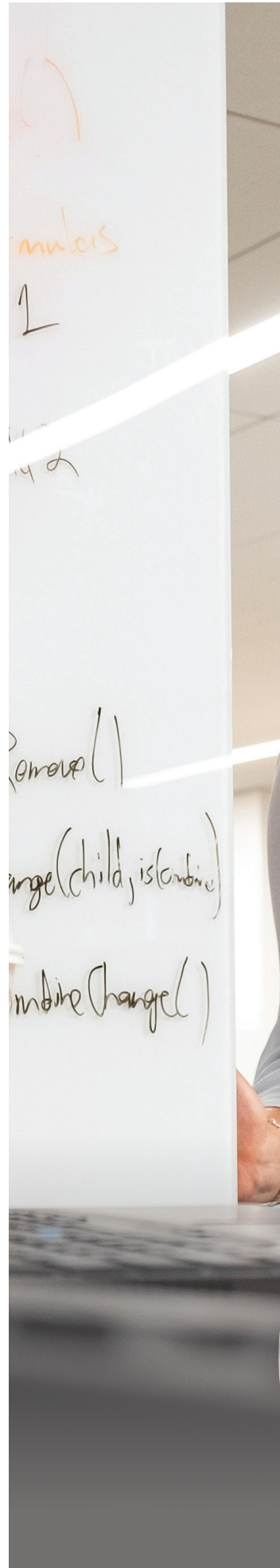
Ethical business conduct is the responsibility of every FactSet employee. We provide the guidance, training, and resources to enable our employees to uphold the standards that our stakeholders expect and to execute at a higher level than our competitors. [FactSet's Code of Business Conduct and Ethics](#) applies to all employees, officers, and directors. At all levels and across global markets, we are united in our vision to unlock smarter investment decisions and insights for our clients through superior data, technology, and service. The Code helps safeguard that our sense of integrity is at the forefront of each business transaction conducted at FactSet.

We have also invested in our infrastructure during our global expansion to meet our stakeholders' growing expectations about ethical conduct and compliance with law.

In fiscal year 18, we updated our whistleblower policy and began to roll out a new independent third-party hotline globally to ensure that employees can fulfill their duty to speak up if they witness unethical business practices. Employees are empowered to make a report using an online intake form, or they can call a toll-free phone number that will be answered in each region by native speakers. Complaints may also be made anonymously at the choice of the reporter.

We also reviewed our anti-bribery and corruption policy and launched enhanced mandatory training for all employees. Training will roll out globally by the end of fiscal year 19.

It is our collective responsibility as FactSetters to maintain a work environment that is supportive, productive, and free from harassment and illegal discrimination. In fiscal years 18 and 19 we developed a new *Mutual Respect in the Workplace* live training which we are rolling out to all of our employees.



We updated our whistleblower policy and began to roll out a new independent third-party hotline globally.

FactSet's Global Hotline ›



FOCUSING ON SECURITY AND PRIVACY

It is essential that all businesses remain laser-focused on cybersecurity as technology increasingly shapes our clients' businesses and the competitive performance of financial institutions. Regardless of how we receive or store information, we have a responsibility to make certain that it is secure so that we can maintain the trust of our clients, our business partners, and our employees.

FactSet's comprehensive security awareness program helps employees to identify risks, implement protective measures to provide services securely, and protect data privacy. This program includes policies and procedures for managing client data, application development lifecycles, system administration, and incidents. In fiscal year 18, we enhanced our commitment to managing risk by hiring our first Chief Information Security Officer to strengthen our programs to protect our enterprise environment, manage cyber risk, and maintain compliance with regulations, policies, and client requirements. We also appointed a senior steering committee to identify and advise on opportunities and challenges ensuring that we have the systems and tools to address and respond to potential security concerns.

In fiscal year 18, we enhanced our commitment to managing risk by hiring our first Chief Information Security Officer. We also appointed a senior steering committee.

[FactSet's Full Security Overview](#) >

2

**INVESTING
IN OUR PEOPLE**



OUR PEOPLE

Our people drive our success. We seek out the best and brightest talent across the globe and create an atmosphere where they can think creatively, contribute actively, and grow professionally within high-performing teams. We support our people throughout their career, and this year we have focused on providing infrastructure that allows our staff to take ownership of their own development. We have given our staff enhanced autonomy and control, and are providing opportunities for FactSetters to gain leading financial industry qualifications and develop new skills. Throughout 2018 we have continued to improve the tools and support networks across our company to allow staff from all backgrounds and with different points of view to truly thrive and be themselves at FactSet. Our values are underpinned by the spirit of going above and beyond and we work hard to ensure that FactSet continues to be a great place to work for our people.

INVESTING IN OUR GREATEST ASSET

FactSet's unique data and smart analytics empower the world's leading financial service professionals to make more informed decisions. Exceptional talent fuels every aspect of our business, from the constantly evolving financial technology that we develop to the unrivaled client service at our core. We aim to be the career destination for the best and the brightest talent. New team members receive immediate responsibility and recognition for their work and are valued personally and professionally.

FactSet's strong record of outstanding client service is the result of our employees' high level of commitment to their work. In turn, FactSet has a passion for developing our employees so that they can experience success and fulfillment in their work.

As the need for financial data and technology continues to grow, so will the future of FactSet and its employees. We will keep investing in our employees, so they can contribute at the highest level and have the resources to continually advance their own career goals. Throughout fiscal year 18 we developed a series of employee-focused initiatives that will help our people to own their development and careers at FactSet, including the following initiatives:

oneFactSet

In fiscal year 18 our leadership team invested in enhanced technology and tools to support our people throughout their FactSet career. The oneFactSet system will streamline the administration of people management, supporting both our managers and their teams. It will integrate our onboarding, learning, and development tools, providing better visibility and transparency across teams, countries, and territories. Launched in fiscal year 19, oneFactSet will be an employee-driven solution that provides our people with greater autonomy over their own career journey at FactSet.



We aim to be
the career
destination for
the best and
the brightest.



THE YEAR OF THE MANAGER

We focused on empowering our people to take responsibility for their own personal development at FactSet.

Based on employee feedback, we learned that our manager-level employees sought to define and strengthen their skills to better support their teams' needs and achieve desired business outcomes. A global focus group identified the characteristics required to be a successful and competent manager at FactSet, which is helping us to make informed decisions about the formal training, internal networks, and resources that employees need to move their career forward.

THE VIRTUAL CLASSROOM

In fiscal year 18 we re-launched our virtual classroom and introduced classes in new regions to support our mission to provide a comprehensive and inclusive learning experience to our global employee population.

PROFESSIONAL QUALIFICATIONS

FactSet offers support for industry-leading certifications to create an environment where employees can learn and grow. Having subject matter experts in areas of finance and technology will enhance FactSet's ability to continually innovate our products and processes. We have done extensive research and have thought strategically about which certifications make sense for different teams at FactSet.





**CASE STUDY: DEEPENING
OUR RELATIONSHIP WITH
THE CHARTERED FINANCIAL
ANALYST INSTITUTE (CFA)**

For over 30 years FactSet has encouraged all employees worldwide to earn the CFA Charter and we have helped over 1,000 employees in their journey to do so. In fiscal year 18 we supported 153 employees. Approximately 200 employees sit for one of the three levels of CFA exams each fiscal year. We continually surpass the worldwide average pass rates on the exam and look to continue this trend in fiscal year 19. Also in fiscal year 18, FactSet partnered closely with the CFA Institute as it moves the curriculum towards a workflow centric framework mapping tightly to buy-side analysts, portfolio managers, and private wealth managers. The CFA Institute team conducted panels in our Norwalk, New York, London, and Boston offices and engaged with FactSet employees to gain insight into user workflows. After completion of the sessions, Dan O'Connor, Director of Institutional Relations at CFA Institute, noted: "I am highly impressed with how FactSet goes above and beyond to partner with its institutional partners and clients."

**UTILIZING TECHNOLOGY TO PROVIDE LEARNING
FOR OUR PEOPLE AND OUR CLIENTS**

We invested in our eLearning team to produce higher quality content that utilizes more advanced eLearning authoring tools.

The team creates internal eLearnings for FactSet employees as well as external eLearnings for our clients. The breadth of internal content is substantial and can cover topics ranging from internal technology to professional skills and manager development. In fiscal year 18, our internal eLearning modules had over 84,000 views from global employees.

We are harnessing the potential that eLearning presents to better train our clients and this is a driving factor behind our push to increase client eLearning modules. As a result, we increased eLearning usage by 34% with clients in fiscal year 18.



229.9K

COMPLETIONS
OF LEARNING
ITEMS DURING
FISCAL YEAR 18

9

AVERAGE HOURS PER
EMPLOYEE GLOBALLY

70.4K

HOURS OF LIVE
INSTRUCTION

353

COURSES

34%

ELEARNING USAGE
WITH CLIENTS IN
FISCAL YEAR 18



“It has been wonderful to have the opportunity to work from home, I feel more energized and focused and feel that FactSet gets more from me. In return, working from home has given me a better work/life balance and more time with my family.”

**Senior Payroll Specialist,
Human Resources, London**

HELPING OUR PEOPLE TO BALANCE WORK AND LIFE

FactSet provides a host of benefits that help our employees be productive at work while enjoying a good quality of life with opportunities for personal and professional development. While our programs and perks vary by location, our comprehensive benefits offering is an integral component of our total rewards approach:

- Comprehensive health coverage for employees and their families
- Retirement savings vehicles to provide financial security and help employees plan for the future
- Life insurance, personal accident insurance, disability coverage, and business travel accident insurance to provide financial protection and peace of mind in the event of unforeseen circumstances
- Paid time off for personal, vacation, and parental leave
- Alternative Work Arrangements (AWA) to help employees balance their work and personal obligations (US and UK offices)
- Perks to make each workday easier such as subsidized lunch in the office Monday through Thursday in most locations
- Discounted services at gyms and wellness facilities
- Extensive training and development opportunities to support employees in their pursuit of lifelong learning, including certification reimbursement for eligible expenses related to the CFA, CIPM, CAIA, and FRM exams
- A robust social community involved in volunteerism, intramural sports, and in-office team building events

ENCOURAGING WORK/LIFE BALANCE AT FACTSET

We are committed to encouraging a healthy work/life balance for employees while maintaining a positive and productive business environment. To support that commitment, FactSet considers various forms of creative work scheduling or Alternative Work Arrangements (AWA) in the US and UK to help employees balance their work and personal obligations.

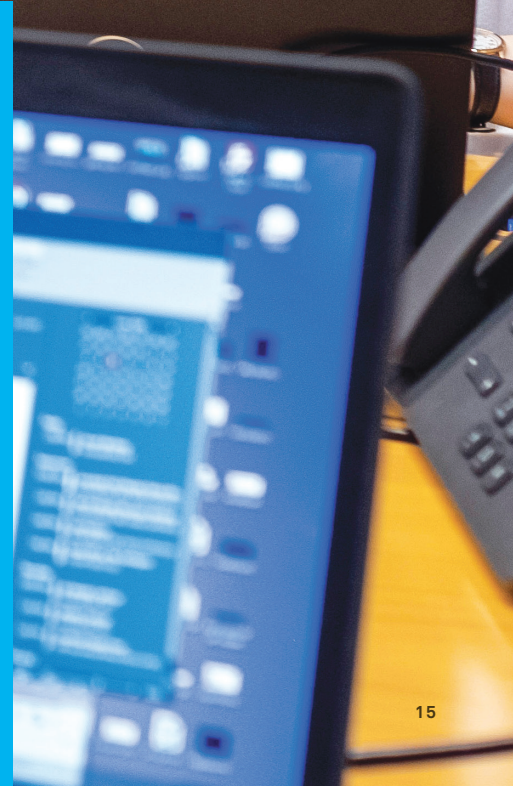
Since launching our Alternative Work Arrangements policy, employees have made changes to their way of working that brings better balance to their lives.



EMBEDDING DIVERSITY AND INCLUSION AT FACTSET

We recognize that our best ideas can come from anyone, anywhere, at any time to help us solve our clients' greatest challenges. We provide the best client solutions when we leverage diversity for collaboration, innovation, and shared success. FactSet is committed to growing our workforce diversity, and we aim to be the career destination for the best and brightest talent that mirrors our diverse global communities and client markets.

At FactSet we are unified by the spirit of going above and beyond — for our clients and for each other. In fiscal year 18 our employees identified inclusion as one of our core values. We foster a globally inclusive culture across the company by enabling our people to be themselves at work and to join in, be heard, contribute, and grow. Our inclusive work environment maximizes engagement, productivity, and ultimately makes FactSet a great place to work.



OUR LONG TERM COMMITMENT TO A DIVERSE AND INCLUSIVE CULTURE

In fiscal year 17, we started execution of a long term strategy to embed diversity and inclusion at FactSet, including four key areas of focus that will be crucial for our continued success. The strategy was developed by a global advisory committee to ensure that our approach considers the diverse experiences and perspectives of our employee population. As a result, FactSet is focused on demonstrating our leaders' visible commitment to diversity and inclusion, developing and implementing a diversity recruiting strategy, retaining and advancing our diverse talent pipeline, and continuing to foster an inclusive culture.

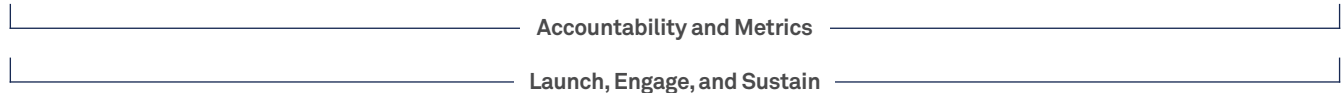
Once again we scored 100 on the Corporate Equality Index™, the Human Rights Campaign Foundation's national benchmarking tool on policies and practices pertaining to LGBT employees, earning the distinction of Best Place to Work for LGBT Equality.

36.5
28.9

PERCENT GLOBAL REPRESENTATION OF WOMEN AT FACTSET

PERCENT U.S. REPRESENTATION OF WOMEN AT FACTSET

THE KEY PILLARS OF OUR DIVERSITY & INCLUSION STRATEGY



DIVERSITY & INCLUSION HIGHLIGHTS

LEADERSHIP COMMITMENT

Our commitment to diversity and inclusion begins with our CEO Phil Snow and the entire FactSet leadership team. Our strategy was developed by a diverse global advisory committee to ensure that our approach considers the wide range of experiences and perspectives held by our employee population worldwide.

We hold our leaders accountable for measuring progress and setting expectations for all our employees that a diverse workforce and inclusive culture is critical to our continued success.

RECRUITMENT

Core to our diversity and inclusion strategy is a focus on hiring the best and brightest talent who contribute diverse backgrounds, perspectives, and experiences to our company. To deliver on this strategy in fiscal year, the Human Resources and the Diversity & Inclusion teams collaborated with the Talent Acquisition team globally to focus on increasing our diversity sourcing and hiring.

To kickstart these efforts, the Talent Acquisition team participated in Unconscious Bias training and prepared themselves to maximize talent acquisition opportunities that support our ability to attract talent from all backgrounds. The Talent Acquisition team also undertook efforts to review and revise job descriptions to make sure that we are attracting a diverse pool of applicants.

As part of FactSet's overall talent acquisition strategy, we continue to diversify our pool of target universities and external partnerships. In addition, we implemented a data-driven approach, so we can measure and analyze how we can continue to strengthen recruitment practices and meet our workforce goals.

RETENTION, GROWTH AND ADVANCEMENT

In fiscal year 18 we launched a pilot sponsorship program, focused on supporting the growth and success of our future leaders from diverse backgrounds by providing career guidance, expanding professional networks, and increasing visibility. This program engages our senior leaders in our diversity and inclusion initiative in a real and practical way. We seek to build on the success of the program and expand the reach of this initiative in fiscal year.

DISRUPTING UNCONSCIOUS BIAS

Building on our fiscal year 18 efforts, we continue to roll out Unconscious Bias training across the organization. Through interactive exercises and dialogue, employees walk away with an increased awareness of what unconscious bias is and ways to disrupt it. The feedback has been tremendously positive, particularly from managers, who are using their gained understanding to better lead their teams and foster a more inclusive work environment for all employees, which helps FactSet achieve the best business outcomes.

BUSINESS RESOURCE GROUPS

FactSet supported the formation of Business Resource Groups (BRGs) in fiscal year 18, which will kick off in fiscal year 19 and are organized around common dimensions of diversity to facilitate increased awareness, employee engagement, and networking. BRGs are grassroots, employee-led diversity initiatives with a mission to champion the full participation of people at all levels. They are aligned to the company's business and diversity and inclusion strategies and assist in achieving our goal of solving our clients' greatest challenges with the power of collaboration, diversity, and inclusion.

Based on employee interest, the initial FactSet BRGs established include:



FACTSET PRIDE BRG



FACTSET BLACK BRG



FACTSET WOMEN'S BRG

While each BRG focuses on a specific dimension of diversity, they are all guided by our core value of inclusion and are open to all employees, regardless of their origin or background. We encourage participation from all employees.

Our employee-driven BRGs have the active support of FactSet's senior leaders, who serve as their Executive Sponsors. These leaders are visible advocates and ambassadors for the BRGs and provide them with actionable opportunities to help increase diversity at FactSet.

FactSet BRGs are focused on three strategic areas: professional development, recruitment and retention, and inclusive culture. Over the next year, we look forward to continuing to grow our BRGs based on employee interest across the globe as a way to enrich our inclusive community and to ensure that all of our employees have opportunities to join in, be heard, contribute and grow.

3

COMMUNITY & VOLUNTEERISM



A CULTURE OF GIVING BACK

Just as we help our clients solve their greatest challenges through collaboration, we believe that giving back to our communities is part of our culture. We recognize our responsibility as a global corporate citizen to invest in the communities where we work, and we direct our employee volunteer efforts and charitable giving for positive social impact. We unite around FactSet's four Pillars of Service, partnering with leading nonprofit organizations that are contributing to the causes that matter most to us. This sense of purpose demonstrates the FactSet spirit of going above and beyond and reflects our employees' pride in working for an organization that cares.

In the past year, we implemented a new technology platform that makes it easy for employees to find volunteer opportunities in their area. We established CSR Committees led by 150 employees across 26 offices who are engaging our colleagues in service projects and expanding our impact across new networks. As a result, we increased the number of service opportunities by 50 percent from the previous year, and our employees served more than 13,000 volunteer hours in fiscal year 18. Together, we are making a difference.

77%

Increased number of volunteer events by 77%

PILLARS OF SERVICE

INSPIRE TOMORROW'S ENGINEERS

Providing the spark that young people need to become future science and technology leaders.



ELEVATE TO EDUCATE

Preparing young people for success with basic math and literacy skills, business and finance knowledge, and employability skills.



ALLEVIATE FOOD INSECURITY

Ensuring that our neighbors have access to safe, nutritious food.



PROTECT OUR ENVIRONMENT

Preserving natural resources and community green spaces in the places where we work.



PREPARING YOUNG PEOPLE FOR SUCCESS

Helping young people from underserved backgrounds reach their educational potential and explore career opportunities in technology creates pathways for social mobility and builds a future diverse workforce prepared to contribute.

Our talented employees are helping the next generation to develop basic literacy and math skills, business and finance knowledge, and life and employability skills. In particular, we are committed to inspiring and preparing students — especially young women and other underrepresented groups — for career opportunities in computer science and technology. We strive to provide the spark that young people need to become future science and technology leaders.



Employees in **Manila** volunteer weekly at a Silangan elementary school to tutor students in reading comprehension.

FactSet's investment in America SCORES supported the rollout of a small business design challenge program to nearly 750 students in five cities, including **Boston**, as well as SCORES' poetry and soccer programs, which inspire urban youth to lead healthy lives and make a difference in the world through service.

FactSet's Women in Engineering group hosted high schools girls from a **Norwalk**-based STEM summer camp to share real world experience about working for a technology company.

SCHOOL

FactSet's national partnership with Junior Achievement (JA) USA brought volunteers to 71 classrooms in eight JA areas, including **Austin**. Across the US, our employees served as role models and encouraged more than 1,100 students in financial literacy, work readiness, and entrepreneurship.



120 FactSetters in **Hyderabad** visited 150 government schools to distribute notebooks and supplies, benefiting more than 31,000 students.

Paris collaborates with Innov'avenir to help young people take their first steps in coding and explore career opportunities in the digital sector.

CASE STUDY: GROWING OUR GLOBAL FOOTPRINT

In our first global volunteer engagement campaign, we connected more than 2,000 employees to meaningful service opportunities, which resulted in more than 6,200 volunteer hours served worldwide. This marked the very first volunteer activity for 12 offices around the world, including Amsterdam, Dubai, Gloucester, Hong Kong, Johannesburg, Melbourne, Paris, Riga, Singapore, Sydney, Tokyo, and Toronto.



Employees in Hong Kong organized a beach cleanup in Shek O.

Engineers in **New York** taught an Hour of Code at local elementary schools, a one-hour introduction to computer science, designed to demystify code, to show that anybody can learn the basics, and to broaden participation in the field of computer science.



London offers workshops focused on digital skill literacy and work readiness for unemployed young people in partnership with Street League, which uses sports to engage young people in programs to get them into work.



Brokerage Citylink's TechStart Mentoring Program pairs 10 FactSet volunteers in **London** with local young people interested in STEM careers. The program includes structured mentoring sessions that help students develop their professional skills and future career plans.

Frankfurt partners with CodeDoor to provide technical training and real world experience to diverse young people eager to learn in-demand software development skills and prepare for the job market.

WORK





More than 90 FactSetters from our Sales and Client Consulting teams joined together for a volunteer project at the Governor's Island Teaching Garden, combining team building and service while helping our nonprofit partner, GrowNYC, to deliver on their mission of empowering all New Yorkers to secure a clean and healthy environment for future generations.



ALLEVIATE FOOD INSECURITY AND PROTECT OUR ENVIRONMENT

FactSetters served more than 6,700 volunteer hours with hunger relief and environmental organizations in their local communities to ensure our neighbors in need have access to safe, nutritious food and healthy green spaces to live and play. Teams and offices around the world joined together to collect and pack donations, prepare and distribute meals, and rescue and deliver unused food to those in need. During our annual Hunger Awareness Week campaign employees elected to donate their daily lunch stipend and raised nearly \$70,000 for food charities. We also partnered with local organizations to protect and preserve green community spaces where we work.



Austin
CENTRAL TEXAS
FOOD BANK

New York
GROWNYC

Norwalk
RISE AGAINST
HUNGER



Colleagues in **Latvia** volunteered to help Paēdušai Latvijai prepare food bundles for people in need.

Riga
PAĒDUŠAI
LATVIJAI

London
LONDON
WILDLIFE
TRUST



Volunteers in **New York, Norwalk** and **Chicago** packed 70,632 meals with global nonprofit Rise Against Hunger, which will feed an average of 672 children in school feeding programs for a year.



Employee volunteers in **London** provide hands-on conservation work for local nature reserve London Wildlife Trust to protect urban biodiversity and ensure the space is accessible for the community.

+6,700

More than 6,700 volunteer hours served with hunger relief and environmental organizations



CASE STUDY: GLOBAL VOLUNTEER DAY

As a company, we understand the importance of turning data into real, actionable information and gaining insight to make smarter decisions. In May, FactSet united for its global volunteer project to create maps of remote parts of the world affected by natural disaster, disease outbreak, or conflict. Partnering with the Humanitarian OpenStreetMap Team, our volunteers mapped 20,300 buildings over a 24-hour period, which equates to over 100,000 people added to the map for the first time. Our contribution will help humanitarian organizations better understand the local population's access to services like water, sanitation, and education.

Over a 24 hour period, we mapped 20,300 buildings, which equates to over 100,000 people added to the map for the first time.



Tokyo
RIVER
CLEANUP

Hong Kong
FEEDING HONG KONG

Hyderabad
AKSHAYA PATRA
FOUNDATION

Manila
KAONG
PLANTING

Sydney
OZHARVEST

Hyderabad supports the Akshaya Patra Foundation's midday meal program, sponsoring two meals a day for 1,000 children each year. Ensuring students have access to nourishing food improves school attendance and performance.



**DEVELOPING
OUR APPROACH
TO SUSTAINABILITY
THROUGH OUR
PRODUCTS AND
OUR OPERATIONS**



OUR FUTURE SUCCESS DEPENDS ON TODAY'S COMMITMENTS

We continue to develop our approach to sustainably managing our business operations across 60 offices in 24 countries. In fiscal year 18, we deepened the understanding of our environmental footprint so that we can better benchmark our impact and integrate sustainable business practices for the future. We grew our Environmental, Social, and Governance (ESG) solutions by partnering with multiple new ESG analysis providers so that our clients can better understand the related business practices of companies worldwide through the FactSet products.

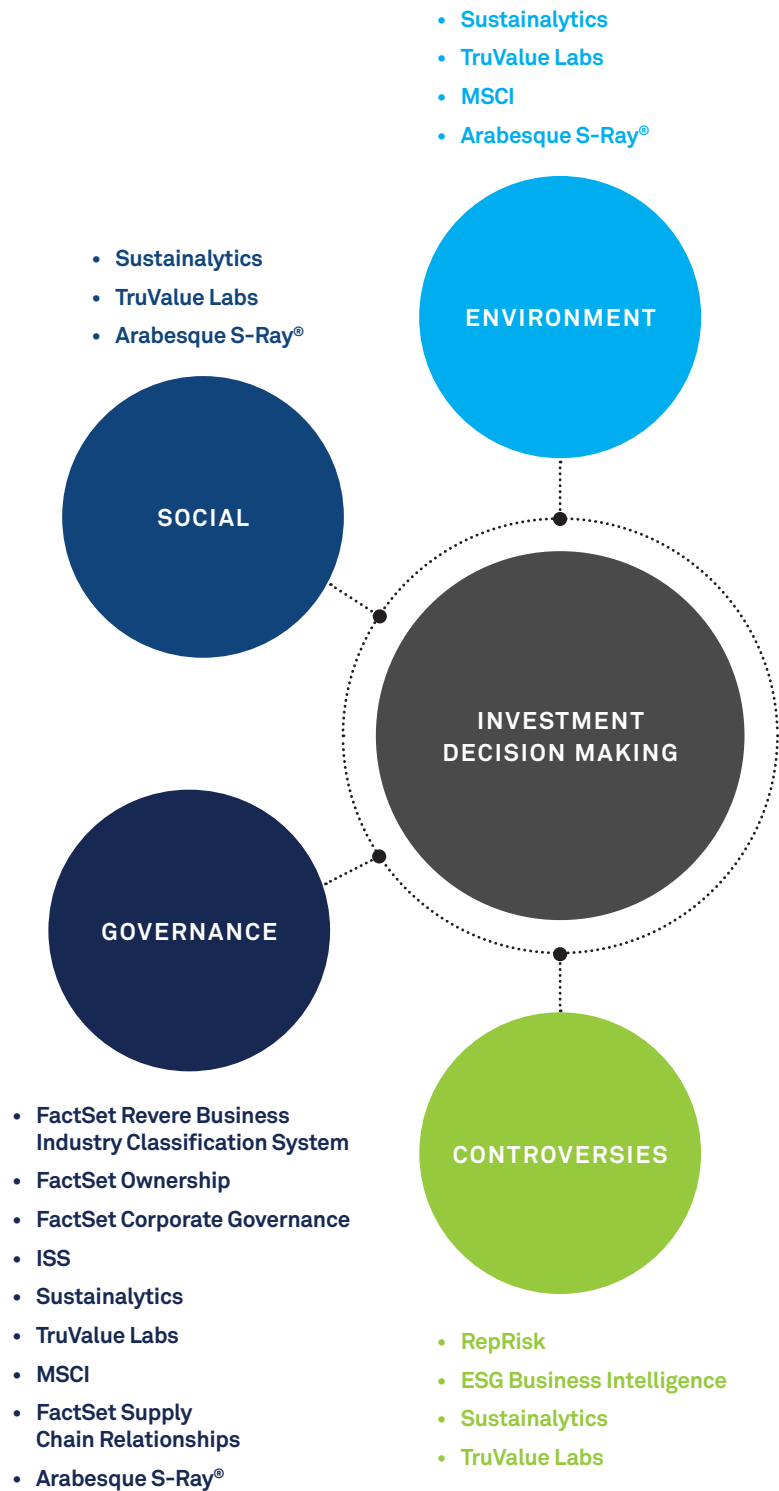
CONNECTING OUR CLIENTS TO ESG SOLUTIONS

ESG investment, the practice of taking a wide range of non-financial performance indicators into account during the investment decision-making process, is growing in prominence to bring benefits not only to investors, but also to the environment and wider society.

FactSet's ESG datasets and proprietary tools provide our clients with the information they need to make informed, responsible investment decisions that drive sustainable growth. As our clients need to access information on ESG risks and opportunities, FactSet enables them to easily integrate ESG factors into portfolio analysis so that they can effectively meet investment mandates and manage risk.

Our approach to providing our clients with ESG solutions is unique. FactSet is an open partner with the ESG community, constantly expanding our network of ESG analysis providers around the world and integrating their products into our solutions.

As a result, we offer our clients a wide range of products and services that allow them to access in-depth research, ratings, and analysis of environmental, social, and governance related business practices of companies worldwide through the FactSet product.



SOLUTIONS

FOCUS ON TRUVALUE LABS

TruValue Labs Insight360 quantifies ESG data found in third-party sources, such as news, NGOs, industry reports, and social media using machine learning techniques. Insight360 provides short-term, long-term, and momentum scores on 30 material ESG categories as well as an aggregate score and volume score for each company. With a focus on both positive and negative ESG events, TVL uncovers investment opportunities as well as risks found in unstructured text.

[Find out more about Truvalue Labs ›](#)

FOCUS ON ARABESQUE S-RAY®

Arabesque S-Ray® is a proprietary tool that allows anyone to monitor the sustainability of over 7,000 of the world's largest corporations. Arabesque S-Ray® is a next generation transparency lens that can empower all stakeholders to make better decisions for a more sustainable future. Through machine learning and big data, Arabesque S-Ray® systematically combines over 200 ESG metrics with news signals from over 50,000 sources across 15 languages. Both scores are combined with a preferences filter that allows anyone to better understand each company's business involvements, and how those activities align with personal values.

[Find out more about Arabesque S-Ray® ›](#)

FOCUS ON REP RISK

RepRisk provides a comprehensive data solution for understanding ESG exposure and risks on a global scale. With detailed breakouts of the environmental, social, and governance factors as well as a proprietary RepRisk score, it is easy to quantify a company or portfolio's exposure to ESG-related risks. Data is collected, aggregated, and analyzed from multiple third-party sources, including over 80,000 media and stakeholder sources. This outside-in perspective helps our clients assess whether a company's policies and processes are translating into actual performance on the ground. RepRisk Public Companies Index® also contain comprehensive research scope of several ESG Issues and Topic Tags covering the key international standards mapped to the 10 principles of the UN Global Compact for equity companies.

[Find out more about RepRisk ›](#)

FACTSET'S CORPORATE GOVERNANCE PRODUCT

FactSet's corporate activism database, SharkRepellent, allows you to monitor and analyze corporate activism with data items related to poison pills, significant activism reported in SEC filings and news sources, and key takeover defenses compiled from articles of incorporation, bylaws, and other publicly available sources.

[Find out more about FactSet Corporate Governance ›](#)

FOCUS ON FACTSET SUPPLY CHAIN RELATIONSHIPS

The FactSet Supply Chain Relationships tool allows our clients to view direct and reverse relationships and analyze 13 key company relationship types. This provides an overview of how extreme market environments could affect custom portfolios and uncovers interconnected relationships within and around a stock portfolio that may affect overall performance. Our clients can use this information to determine the downstream impact of changes in a relationship network and understand opportunities and risks caused by events.

Find out more about FactSet Supply Chain Relationships >

The FactSet Supply Chain Relationships tool allows our clients to analyze 13 key company relationship types to understand how extreme market environments could affect custom portfolios.

FACTSET Today's Top News Markets Company/Security Ownership Calendar Filings

SharkWatch Activism / Governance

0851399389C

1-800-FLOWERS.COM, Inc. Class A (FLWS-US) \$14.35 Next Report Date: 26 Aug '18 Key Statistics FactSet Shark/Repellent

Corporate Governance Provisions

<http://investor.1800flowers.com/investors/corporate-governance> S&P 500

INCORPORATED IN: Delaware POISON PILL: None Adopted

	FLWS-USA	Supermajority to Amend/Repeal (% required)	SIC Grp 59	S&P 500	% Firms with Provision
Board					
Majority Vote Standard to Elect	✗ Bylaws	N/A	37.74	89.98	⚠
Director Resignation Policy	✗ N/A	N/A	37.74	89.98	⚠
Classified Board	✗ Charter/Bylaws	Yes (66.67%)	35.85	10.87	
Board Can Increase/Decrease Board Size	✓ Charter/Bylaws	Yes (66.67%)	100.00	99.79	
Directors Removed Only for Cause	✗ Charter	Yes (66.67%)	43.40	25.16	
Supermajority Vote to Remove Directors (% required)	✗ Charter	Yes (66.67%)	20.75	15.78	
Supermajority Only if Removal Without Cause (% required)	✗ Charter	Yes (66.67%)	0.00	1.49	
Board Fills All Vacant Seats	✓ Charter/Bylaws	Yes (66.67%)	86.79	78.68	
Voting					
Proxy Access (% required)	✗ State Default	No	13.21	71.43	⚠
Cumulative Voting	✗ State Default	No	1.89	3.20	
Action by Written Consent	✗ Charter	No	37.74	30.06	
Unanimous Written Consent	✗ Charter	No	7.55	29.42	
Shareholders Can Call Special Meetings (% required)	✗ Bylaws	Yes (66.67%)	41.51	64.81	⚠
Supermajority for Mergers (% required)	✗ State Default	No	3.77	21.11	
Supermajority Does Not Apply to Board Approved Mergers	✗ State Default	No	3.77	6.40	
Supermajority to Amend All/Certain Charter Provisions (% reqd)	✓ Charter (66.67)	Yes (66.67%)	47.17	38.59	⚠
Supermajority to Amend All/Certain Bylaw Provisions (% reqd)	✓ Bylaws (66.67)	Yes (66.67%)	33.96	14.93	⚠
Advance Notice for Proposals (minimum days)	✓ Bylaws (90)	Yes (66.67%)	39.62	18.55	⚠
Advance Notice for Nominations (minimum days)	✓ Bylaws (90)	Yes (66.67%)	39.62	18.55	⚠
Derivative Disclosure in Advance Notice Requirements	✗ N/A	No	45.28	76.33	⚠
Other Provisions					
Blank Check Preferred Stock	✓ Charter	No	98.11	95.10	
Board Can Amend Bylaws	✓	Yes (66.67%)			

Bullet Proof Rating

2.25 / 10

2.72 Florists (SIC 5992)
1.94 S&P 500

Ownership

FLOAT: 66.86 SHARES OUT (M): 36.04

Insider Ownership: 33.14%
Institutional Ownership: 63.86%
Top 10 Institutional Holders: 38.26%

Management & Board

AVG. TENURE: 16.65 Years

TOTAL MEMBERS: 17

- Management: 9 (50.00%)
- Board: 9 (50.00%)
- Female: 3 (33.33%)

Management: 23.28
Board: 15.12

DUAL ROLE

No

CEO: Christopher G. McCann (Male)
CHAIRMAN: James Francis McCann (Male)

Proxy Timing/Shareholder Meetings

LATEST ANNUAL MTG.: 11 Dec '17

Written Consent: None
Special Mtg: None

ANNUAL NOTICE DATES

Proposals (SEC Rule 14a-8): 2018-07-02
Fight Proposals/Noms: Between 13 Aug '18 and 12 Sep '18.

FACTSET › SEE THE ADVANTAGE

ENVIRONMENTAL STATEMENT OF INTENT

We released our Environmental Statement of Intent, which publicly articulates our intentions to manage our business sustainably with key identified commitments and objectives:

- We will govern our environmental sustainability at an appropriate level with oversight from the Executive Vice President, Strategic Resources, and General Counsel and the Senior Vice President of Corporate Responsibility
- We will review our environmental performance measurements and work towards implementing an environmental management system
- We have a plan to measure our carbon footprint to establish a baseline and more fully assess and determine appropriate next steps regarding future measuring and reporting, and target reductions if applicable
- We have plans to evaluate programs to assess our current efforts and further determine the extent of our capability to measure our waste, and where possible, incorporate reduction, re-use, and recycling measures within our business operations
- We will work with our suppliers to encourage them to manage their own operations in a responsible and sustainable manner

[FactSet's Full Sustainability Statement ›](#)

HELPING OUR PEOPLE TO ACT SUSTAINABLY

FactSet employees care deeply about sustainability and our company is committed to minimizing our environmental footprint in the office. For example, in certain locations we have removed plastic straws from our supply-chain and eliminated plastic coffee stirrers. In other locations we have worked with staff to identify areas to reduce waste and non-recyclable items and for example, have introduced reusable cutlery in certain locations, but we are carefully watching the rise in use of detergents, electricity, and water. In our San Francisco, Austin, Boston, and Chicago offices we switched to a coffee supplier with recyclable coffee pods that uses Rainforest Alliance™ certified coffee beans.

Outside of our operational footprint and core products, we work with nonprofits that help our staff to better understand the issues impacting global climate change such as habitat destruction and the impact of global waste.





FactSet employees care deeply about sustainability and our company is committed to minimizing our environmental footprint in the office.

A photograph of a modern, multi-story office building with a prominent 'FACTSET' logo on the facade. The building features a mix of white and grey panels and large glass windows. The sky is blue with some clouds.

FACTSET

SUSTAINABLY MANAGING OUR FACILITIES AROUND THE WORLD

As of publication of this report, we have 55 leased offices in 41 cities in 21 countries around the world. We strive to design our new offices in an environmentally conscious manner.

PLANNING FOR OUR NEW HEADQUARTERS

In 2018, we embarked on a project to design tenant improvements for our new location for our global headquarters in Norwalk, Connecticut, bearing in mind efficiency, FactSet's long-term sustainability, and the health and wellbeing of our staff. We are working with design, sustainability, and health and wellbeing experts to design a space that uses energy and water efficiently, encourages recycling, and uses more sustainable materials for building and furnishings. We expect to move in December 2019.

The design goal in our new headquarters is to achieve efficiencies through state-of-the-art sustainable features such as daylight harvesting, LED lighting, and an under-floor air distribution system. We have eliminated bottled and plastic non-carbonated water bottles and plan to install water saving fixtures in the restrooms and pantries.

In addition to environmental sustainability in construction of new tenant improvements and furnishings, we are creating a positive work environment for employees that maximizes natural light, allows quiet spaces to support concentration, provides ergonomic furniture, and offers access to outdoor spaces.

NEW MANILA BUILDING IS DESIGNED TO BE LEED SILVER CERTIFIED

In 2020, we will be moving to a new FactSet Tower to accommodate our growing workforce of over 2,200 employees in the Philippines. The building is slated to be LEED Silver certified with a state-of-the-art air conditioning system that is more efficient than any of the systems in our current Manila locations and is designed to minimize carbon emissions.

In Manila, all our crockery and cutlery are reusable, and we arrange for everything to be cleaned each day, ensuring that all plastic bottles are separated from the general waste and recycled.

We have 55 leased offices in 41 cities in 21 countries around the world. We strive to design our new offices in an environmentally conscious manner.



WORKING WITH OUR LANDLORD TO ACHIEVE HIGH SUSTAINABILITY STANDARDS IN CHICAGO

Our Chicago office is LEED Gold certified with features such as large solar windows that let in light while blocking heat and cold. Our landlord has recently upgraded the sustainability features of the building. We also select office supplies that, where possible, minimize environmental impact and we donate our old equipment to local charities to limit our waste.

CONTRIBUTING TO A COMPREHENSIVE ENVIRONMENTAL MANAGEMENT SYSTEM IN LONDON

Our Broadgate Quarter London office holds ISO 14001 certification and we received the Green Ribbon Award from Hosking Associates for three years running. This recognition is awarded to buildings that pass a 50-point environmental audit and continue to improve their environmental credentials.

Smart meters are deployed around the office enabling additional visibility of energy consumption. Our landlords completed successful work on plant optimization and system efficiency with new chillers. The installation of LED lighting in common areas has led to energy savings. Our landlord communicated that the Building's gas consumption has also been reduced by 4.7% through a boiler optimization program.

Our London landlord put an extensive recycling program in place, including food waste separated for anaerobic digestion, glass separation, cardboard separation and mixed dry recycling, and where recycling is not possible, waste goes through a materials recovery facility and is finally used for energy generation.

SELECTING A NEW BRAND-NEW OFFICE TOWER THAT HELPS US TO MEET OUR SUSTAINABILITY GOALS IN HYDERABAD

Our company worked hard for the past several years to find a new building to accommodate our workforce and provide better sustainability and employee wellbeing. The new facility includes energy metering on every floor that reports on lighting, air conditioning and server load separately. This metering allows us to identify where we are using the most energy. In addition, the office features LED lighting throughout and we are participating in the landlord's waste management and recycling program. With our new approach to measurement we expect a reduction in CO₂ and waste to landfill from our Hyderabad office throughout FY19.



GRI TABLE

This report references the following Global Reporting Initiative Sustainability Report Standards:

DISCLOSURE	DESCRIPTION	LOCATION
102-1	Name of the organization	Page 1
102-2	Activities, brands, products, and services	Page 27, 28, 29 www.factset.com
102-3	Location of headquarters	Page 32 www.factset.com
102-4	Location of operations	Page 1, 20–21, 24–25
102-5	Ownership and legal form	Annual report
102-6	Markets served	Page 3
102-7	Scale of the organization	Page 3
102-8	Information on employees and other workers	Page 13, 16
102-10	Significant changes to the organization and its supply chain	Annual report
102-14	Statement from the most senior decision-maker of the organization	Page 1
102-16	Values, principles, standards, and norms of behavior	Page 5, 6
102-17	Mechanisms for advice and concerns about ethics	Page 5, 6
102-18	Governance structure	Page 5
102-20	Executive-level responsibility for economic, environmental, and social topics	Page 30
102-22	Composition of the highest governance body and its committees	Page 5
102-33	Chair of the highest governance body	Page 5
102-34	Nominating and selecting the highest governance body	Page 5
102-40	List of stakeholder groups	Page 1, 2, 36

DISCLOSURE	DESCRIPTION	LOCATION
102-43	Approach to stakeholder engagement	Page 6, 36
102-45	Entities included in the consolidated financial statements	Annual report
102-50	Reporting period	Page 2
102-51	Date of most recent report	Page 2
102-52	Reporting cycle	Page 2
102-53	Contact point for questions regarding the report	Page 2
102-54	Claims of reporting in accordance with the GRI Standards	Page 2
102-55	GRI content index	Page 34, 35
201-1	Direct economic value generated and distributed	Annual report
205-2	Communication and training about anti-corruption policies and procedures	Page 6
302-4	Reduction in energy consumption	Page 32, 33
306-2	POTENTIAL: Waste by type and disposal method (CT, NY only)	Page 32
401-3	Parental leave	Page 14
404-1	Average hours of training per year per employee	Page 13
404-2	Programs for upgrading employee skills and transition assistance programs	Page 9, 10, 11, 12
405-1	Diversity of governance bodies and employees	Page 5, 16, 17
409-1	Operations and suppliers at significant risk for incidents of forced or compulsory labor	https://insight.factset.com/hubfs/PDFs/factset-uk-modern-slavery-act-statement.pdf
413-1	Operations with local community engagement	Page 19–25



LETTER FROM LAURA RUHE

Last year we released our first Corporate Responsibility Report to ensure that our employees, clients, shareholders, and local communities understand our strong governance, commitment to diversity and inclusion, meaningful community service, and focus on sustainability.

The report helped us forge a road map for making progress and we are proud of the inroads we made in one year. We are also pleased to share how FactSet helps our clients with ESG Investing through our products and robust content offerings. Most importantly, we hope you see that our success is based on our service focused culture developed over 40 years.

At FactSet we have fun collaborating, innovating, and serving all of our stakeholders. We look forward to sharing our continued progress in our third report next year.

A handwritten signature in black ink that reads "Laura Ruhe". The signature is fluid and cursive, with the first letters of "Laura" and "Ruhe" being capitalized and prominent.

Laura Ruhe
SVP, Corporate Responsibility & Inclusion



“FactSet’s commitment to Social Responsibility and Diversity has absolutely made me proud to work here.”

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