

FOCUS

FactSet FOCUS User Conference | May 4 - 7, 2026 | Austin, TX

Agenda & Sessions

Explore two and a half days filled with insights, innovation, and networking opportunities.



FACTSET

Monday, May 4

6:00 PM **Welcome reception**

Join us at the Omni Barton Creek for an exciting kick-off to FOCUS 2026!

Tuesday, May 5

8:00 am **Breakfast and Morning Pulse with Dow Jones**

Start your day with a delicious breakfast and networking opportunities with peers, while the Morning Pulse updates you on the latest developments, emerging opportunities, and key risks shaping the global landscape.

9:00 AM **FOCUS Opening + Welcome Address**

FOCUS begins by cutting straight to what matters - setting the tone for what's ahead and connecting the dots between today's challenges, tomorrow's opportunities, and the themes that will shape the next few days. Join us as we kick off the conference with a powerful opening that launches the conversations and momentum for a great week ahead.

10:00 AM **Break**

Enjoy a brief transition break between sessions to recharge and connect with fellow attendees.

10:15 AM **Breakout Sessions & MASTERCLASSES**

Dive into targeted sessions designed to give you actionable insights and strategies:

- **Track 2:** Beyond the Dream: Navigating the Journey to Modern Systems
 - **Track 3:** Reimagining Systematic Investing: Next-Gen Quant Workflows
 - **Track 4:** Evolving Toward Whole Portfolio Thinking – The Total Portfolio Approach (TPA)
 - **MASTERCLASS:** Alpha, Reimagined - The Future of Investment Research and How To Stay Ahead
-

11:00 AM **Break**

Enjoy a brief transition break between sessions to recharge and connect with fellow attendees.

11:15 AM

Breakout sessions & MASTERCLASSES

Dive into targeted sessions designed to give you actionable insights and strategies:

- **Track 1:** Architecting the Future: Cloud, Hybrid, or Repatriation?
- **Track 2:** Managing Risk in a Volatile World
- **Track 3:** From Data to Decision: GenAI-Powered Research for the Modern Buy-Side
- **Track 4:** Strategic Manager Decisions: Research, Selection & Due Diligence
- **MASTERCLASS:** From Portfolio Vision to Trade Precision - Leveraging Portfolio and Trading Tools to Enhance Your Day-to-Day Workflow

12:00 PM

Networking lunch

Reconnect with colleagues and meet new peers over a curated lunch experience.

1:00 PM

Breakout sessions & MASTERCLASSES

Continue your learning journey with in-depth sessions and hands-on MASTERCLASSES:

- **Track 1:** Semantic Layers as the Foundation for Generative AI
- **Track 2:** Bridging the Divide: How Asset Managers and Wealth Managers are Reimagining Distribution
- **Track 3:** Trading Transformed: The Mega Trends Driving Automation, Outsourced Trading, and Scale
- **Track 4:** Data as Alpha: Integrating Public and Private Market Intelligence
- **MASTERCLASS:** Signals to Systems - Smarter Workflows for Seamless Systematic Investing

1:45 PM

Break

Enjoy a brief transition break between sessions to recharge and connect with fellow attendees.

2:00 PM

Breakout sessions & MASTERCLASSES

Continue your learning journey with in-depth sessions:

- **Track 2:** The Rise of Whole Portfolio Intelligence
- **Track 3:** Navigating the Low-Carbon Transition: Opportunities, Risks, and Returns
- **Track 4:** Navigating the New Rate Regime: Asset Allocation in a World of Persistent Inflation

2:45 PM

Afternoon Break

Refresh with light snacks and beverages, and take this opportunity to visit our booth sponsors and discover the latest solutions.

3:30 PM

Keynote - Innovation Unleashed: Setting the Pace in Finance

FactSet CEO Sanoke Viswanathan will take the FOCUS 2026 main stage to share his vision for the future in his keynote, "Innovation Unleashed: Setting the Pace in Finance." Sanoke will discuss how purposeful innovation will drive the future of financial services at the inflection point of agentic AI. He'll outline how FactSet is positioned to lead clients through this transformation, with connected intelligence, open and flexible platforms, and technology that elevates workflows to accelerate insight, and empower decision-making.

3:50 PM

Keynote Q&A

Sanoke Viswanathan, FactSet's CEO, will be joined by Dan Nathan, founder of RiskReversal Media, seasoned trader, and a widely followed voice on markets, risk, and investing for a rapid-fire executive Q&A - sharing his perspective on leadership, markets, and what's next.

4:20 PM

CEO Panel

Join us for a thought-provoking panel discussion to conclude the first day of FOCUS 2026.

5:00 PM

Happy hour - sponsored by Fusion by J.P. Morgan

Unwind with drinks and conversation as you network with fellow attendees, sponsored by Fusion by J.P. Morgan.

6:00 PM

Free evening

Wednesday, May 6

8:00 am

Breakfast and Morning Pulse with Dow Jones

Start your day with a delicious breakfast and networking opportunities with peers, while the Morning Pulse updates you on the latest developments, emerging opportunities, and key risks shaping the global landscape.

9:00 AM

Panel: Breaking Down the Market Data Monolith

Markets don't wait. And neither can the infrastructure that powers them. In this mainstage conversation, leaders from Vanguard, Amazon Web Services, and FactSet share the strategic vision behind one of the industry's most ambitious real-time transformations.

This isn't just about migrating to the cloud. It's about rethinking the role of market data as a strategic asset.

Take a look at how these teams re-architected a market data ecosystem to unlock real-time intelligence at a global scale – strengthening resilience, accelerating innovation, and creating a foundation ready for the next decade of market evolution.

Because in today's environment, real-time isn't an upgrade. It's a competitive imperative.

10:15 AM

Fireside Chat

Sanoke Viswanathan, FactSet's CEO, will be joined by Eric Schimpf, President and Co-Head of Merrill Wealth Management for a fireside discussion.

11:00 AM

Break

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11:15 AM

Breakout Sessions & MASTERCLASSES

Dive into targeted sessions designed to give you actionable insights and strategies:

- **Track 1:** From Vision to Execution: Building Agentic AI Workflows with MCP
 - **Track 2:** Operational Alpha: Rethinking Data Management
 - **Track 3:** Adapting to Global Macro Shifts: Strategies for a Changing World
 - **Track 4:** Benchmarking & Performance in a Private Markets World
 - **MASTERCLASS:** The Evolving Role of Performance – Convert History, Power Analysis, and Learn How to Measure What Matters Next
-

12:00 PM

Networking lunch

Reconnect with colleagues and meet new peers over a curated lunch experience.

1:00 PM

Breakout sessions & MASTERCLASSES

Dive into targeted sessions designed to give you actionable insights and strategies:

- **Track 2:** Mission Critical: The Importance of the Performance Function
- **Track 3:** The Next Evolution of Performance Management: Behavioral Analytics for Alpha Creation
- **Track 4:** From Dashboards to Data Science: The Allocator Tech & AI Stack
- **MASTERCLASS:** Holistic Portfolio Intelligence – Integrated Analysis & Reporting Empowering Daily Portfolio Insights

2:00 PM

Breakout sessions

Continue your learning journey with in-depth sessions:

- **Track 1:** Navigating Data Complexities in Investment Operations
- **Track 2:** From Reports to Relationships: The Digital Transformation of Client Reporting
- **Track 3:** Generational Wealth Transfer
- **Track 4:** From Models to Insight: Evolving Risk Management for Modern Portfolios

2:45 PM

Afternoon Break

Refresh with light snacks and beverages, and take this opportunity to visit our booth sponsors and discover the latest solutions.

3:30 PM

Breakout sessions & MASTERCLASSES

Continue your learning journey with in-depth sessions:

- **Track 1:** Data Rights, Governance & AI: Staying Compliant in an AI World
- **Track 2:** The Convergence of Risk and Performance Measurement
- **Track 3:** Digital Transformation in the AI Era
- **Track 4:** Private Credit: The New Engine for Income and Total Return

4:15 PM

Break

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4:30 PM

The Whole Portfolio Era: When Private Markets Go Mainstream

Private markets are moving from satellite allocations to core portfolio building blocks – across wealth, institutional, and alternatives. As wealth platforms democratize access, asset managers launch hybrid structures, and asset owners rethink mandates, the lines between public and private investing are dissolving. Join leaders from across the ecosystem as they discuss what it takes to operate, allocate, and compete in the Whole Portfolio Era, and what separates those adapting from those falling behind.

6:30 PM

Evening Reception in Downtown Austin

Join us at Brazos Hall in downtown Austin for a night of networking and fun.

Thursday, May 7

8:00 am

Breakfast and Morning Pulse with Dow Jones

Start your day with a delicious breakfast and networking opportunities with peers, while the Morning Pulse updates you on the latest developments, emerging opportunities, and key risks shaping the global landscape.

9:30 AM

The Judgement Era: From Data to Context to Reasoning

As data volumes surge and AI reshapes expectations, traditional analytics is no longer enough. The next frontier is providing the right context of a user's intent – insights that go deeper than data. That starts with a modern data foundation: vectorizing and enriching raw structured and unstructured data into a semantic layer that enables faster discovery and more intelligent automation. In this main stage conversation, industry leaders explore how new model capabilities, embedding technologies, and enriched data architectures are rewriting the playbook on investment research, portfolio strategy, and the future of enterprise intelligence.

11:00 AM

Break

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11:15 AM

Closing Keynote

Join us for a thought-provoking keynote to conclude FOCUS 2026

12:00 PM

End of FOCUS 2026

FOCUS 2026 concludes.
