

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 1:** Beyond the Dream: Navigating the Journey to Modern Systems
 - **Track 2:** Reimagining Systematic Investing: Next-Gen Quant Workflows
 - **Track 3:** Evolving Toward Whole Portfolio Thinking – The Total Portfolio Approach (TPA)
 - **MASTERCLASS:** Alpha, Reimagined - The Future of Investment Research and How To Stay Ahead
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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:** Managing Risk in a Volatile World
- **Track 2:** From Data to Decision: GenAI-Powered Research for the Modern Buy-Side
- **Track 3:** 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:** Bridging the Divide: How Asset Managers and Wealth Managers are Reimagining Distribution
- **Track 2:** Trading Transformed: The Mega Trends You Can't Ignore
- **Track 3:** 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 1:** The Rise of Whole Portfolio Intelligence
- **Track 2:** Powering the AI Economy: Energy Infrastructure, Demand Growth, and the Next Investment Cycle
- **Track 3:** 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.

2:50 PM

Flash Session: What if Research Could Do More?

Join Chris Ellis for an introduction to FactSet's Research Intelligence – a unified solution bringing together AI-driven broker research summaries, detailed company models, and expert networking insights from leading providers.

3:15 PM

Flash Session: From Insight to Opportunity

In this FOCUS Flash Session, see how FactSet and TIFIN are helping teams identify high-potential prospects, personalize outreach, and move faster from signal to action – within a single, connected workflow.

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

Straight to It: Fast Questions, Real Answers

Factset CEO Sanoke Viswanathan 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.

4:15 PM

Building the AI-Driven Enterprise: Lessons from the Front Lines

Join FactSet CEO Sanoke Viswanathan in a conversation with Guy Halamish, COO of J.P. Morgan’s Commercial & Investment Bank, as they unpack how J.P. Morgan is driving real business value from AI.

4:45 PM

Flash Session: Data. Intelligence. Delivered.

Join JP Morgan for a 10-minute demo showcasing how portfolio data is transformed into fully distributed, actionable intelligence – delivered seamlessly across teams, systems, and client touchpoints.

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

The New Architecture of Wealth: AI, Private Markets, and the Future of Advice

Wealth management is at an inflection point. AI, private markets, and rising client expectations aren't just reshaping the industry, they're redefining what leadership looks like. In this fireside chat, FactSet CEO Sanoke Viswanathan and Merrill Wealth Management President and Co-Head, Eric A. Schimpf, share how they're making strategic bets, navigating trade-offs, and building for scale in a rapidly evolving landscape. Join this conversation for a candid leadership perspective on what it takes to stay ahead – and how to lead through the next era of tech and wealth.

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:** Operational Alpha: Rethinking Data Management
- **Track 2:** Adapting to Global Macro Shifts: Defense, Space, and AI Infrastructure
- **Track 3:** 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 1:** Mission Critical: The Importance of the Performance Function
- **Track 2:** Measuring What Matters: A Smarter Approach to Liquidity and Trade Costs
- **Track 3:** 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:** From Reports to Relationships: The Digital Transformation of Client Reporting
- **Track 2:** Generational Wealth Transfer
- **Track 3:** Semantic Layers as the Foundation for Generative AI

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.

2:50 PM

Flash Session: What if Investor Engagement Could Move Faster?

Join Chris Albanese, FactSet's Senior Director, Product Management, for a first look at Corporate Connect, FactSet's approach to more connected, efficient investor-issuer engagement. Designed to reduce friction on both sides, Corporate Connect brings outreach, insight, and prioritization into a more streamlined, intuitive workflow. Curious what that looks like in practice? This Flash Session is where it starts.

3:30 PM

Breakout sessions

Continue your learning journey with in-depth sessions:

- **Track 1:** The Middle Office Mandate: Performance at the Center
- **Track 2:** Digital Transformation in the AI Era
- **Track 3:** Navigation Data Complexities in Investment Operations

3:45 PM

Flash Session: Inside FactSet Intelligence – How FactSet is Architecting the AI-Driven Future of Finance

Join Chief AI Officer Kate Stepp for a fast-paced deep dive into FactSet Intelligence (FI) – the architecture driving and redefining how workflows get done.

4:15 PM

Break

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4:30 PM

Panel Discussion: From Data to Alpha: Powering the AI-Ready Buyside

AI is quickly becoming core to how investment firms generate alpha – but advantage comes down to execution. Join FactSet, Databricks, and Federated Hermes to explore how integrated data ecosystems are powering next-generation research, portfolio, and performance workflows. This session will focus on the real decisions firms are making to operationalize AI, and what it takes to turn data into investment outcomes.

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

Start your day with a delicious breakfast and networking opportunities with peers.

8:30 am

Morning Pulse with Dow Jones

Continue to enjoy breakfast and network with peers, while the Morning Pulse updates you on the latest developments, emerging opportunities, and key risks shaping the global landscape.

9:30 AM

Mastering the Intersection of AI and Data

In this candid conversation, leaders from Snowflake and T. Rowe Price explore what it really takes to scale AI in practice. From accelerating integration to redefining how success is measured, they unpack the critical – and often underestimated, challenges at the heart of modern data strategies. Where are firms making progress? Where are they stalling? And what does it take to turn strong foundations into real AI outcomes?

10:15 AM

The New Allocation Playbook: Public vs. Private in a Changing Market

The lines between public and private markets are increasingly blurred. In this panel, investors discuss how asset allocation strategies are evolving – balancing opportunity and complexity while navigating shifting market conditions, client expectations, and liquidity needs.

11:00 AM

Featured Speaker

Writer, analyst, and cohost of entrepreneur Scott Galloway's daily podcase "*Prof G Markets*," Ed Elson will share his perspective on the news moving the capital markets and the insights shaping today's media landscape. Recently named to Forbes' 2026 30 Under 30 – Media list, Ed brings a fresh and informed voice to the conversation.

12:00 PM

End of FOCUS 2026

FOCUS 2026 concludes. Don't forget to grab your boxed lunch before you head out!
