

FACTSET OWNERSHIP (formerly LionShares) DATA ON WHARTON RESEARCH DATA SERVICES (WRDS)

Considered the market standard, FactSet Ownership provides global institutional, mutual fund, and stakeholder, and float-related share ownership information.

FactSet provides the flexibility to investigate share ownership from both the company and holder perspective. From ultimate parent ownership to holder peer analysis, FactSet Ownership allows you to analyze ownership.

FACTSET OWNERSHIP ENCOMPASSES THE EQUITY POSITIONS HELD BY:

30,000+
institutions

40,000+
mutual funds

400,000+
insiders and stakeholders



FACTSET OWNERSHIP SUMMARY DATA TOOL

How does the FactSet Ownership Summary Tool enhance the Ownership data?

- Provides aggregate ownership measures (at the firm-quarter level) that are commonly used in analysis or papers not often easy to compute from the original data.
- Delivers a simple downloadable file with new data insight: details in terms of origin and type of institutional investors (Herfindhal Index).
- Flexible delivery: Download the data with a few clicks using the web interface or run the sample code available to replicate the data.

This tool was created by Professor Miguel Ferreria (Nova School of Business and Economics) and Pedro Matos (University of Virginia – Darden School of Business), in collaboration with WRDS.

OWNERSHIP DATA THROUGH WRDS

- Easily extract and download data via simple web queries
- Merge or integrate FactSet Ownership with other databases such as CRSP, Compustat, AuditAnalytics, Option Metrics and NYSE's Trade and Quotes.
- Access data from 13F, 13G, 130, and Insiders Filings
- Consistent methodology ensures the most accurate information.

▲ Coverage from 1999, over 120 countries

ABOUT FACTSET

FactSet helps the world's best investment professionals outperform. For more than 35 years, financial professionals have relied on FactSet's streamlined solutions and unmatched client support to get their jobs done, better. FactSet's global datasets, powerful analytics, and comprehensive data feeds let users stay ahead of market trends, access extensive company and industry intelligence, and monitor performance of their equity and fixed income portfolios in the office or on the go. Headquartered in Norwalk, Connecticut, FactSet conducts operations with over 6,800 employees in 35 global office locations. Learn more at FactSet.com, and follow us on Twitter: Twitter.com/factset.

ABOUT WRDS

Wharton Research Data Services (WRDS) is the leading data research platform and business intelligence tool for over 30,000 corporate, academic, government and nonprofit clients at over 350 institutions in 33 countries. WRDS provides the user with one location to access over 200 terabytes of data across multiple disciplines including Accounting, Banking, Economics, Finance, Insurance, Marketing, and Statistics. Flexible data delivery options include a powerful web query method that reduces research time, the WRDS Cloud for executing research and strategy development, and the WRDS client server using PCSAS, Matlab, Python and R. Our Analytics team, doctoral-level support and rigorous data review and validation give clients the confidence to tailor research within complex databases and create a wide range of reliable data models.

From partnerships with data vendors, to our own tools including the WRDS SEC Analytics Suite, to develop custom-tailored datasets from all SEC filings, parsing millions of regulatory reports, WRDS Quant Alpha, a powerful tool to discover and test unknown stock anomalies, and the Wharton School's OTIS, an online trading and investment simulator — WRDS is the global gold standard in data management and research, all backed by the credibility and leadership of the Wharton School.

ABOUT THE WHARTON SCHOOL

Founded in 1881 as the first collegiate business school, the Wharton School of the University of Pennsylvania is recognized globally for intellectual leadership and ongoing innovation across every major discipline of business education. With a broad global community and one of the most published business school faculties, Wharton creates economic and social value around the world. The School has 5,000 undergraduate, MBA, executive MBA, and doctoral students; more than 9,000 participants in executive education programs annually and a powerful alumni network of 93,000 graduates.

For trial of the data or subscription information

WRDS | www.whartonwrds.com | wrds@wharton.upenn.edu | +1 877-438-9737

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