FactSet and Hamilton Lane Announce Strategic Partnership to Deliver Integrated Private Markets Analytics

November 2, 2026

New solution is designed to unify expansive public and private markets intelligence into a single, connected portfolio analytics workflow

NORWALK, Conn. and CONSHOHOCKEN, Pa., Nov. 02, 2026 (GLOBE NEWSWIRE) -- FactSet (NYSE: FDS | NASDAQ: FDS), a leading global intelligence and AI solutions provider to the financial markets, and Hamilton Lane (NASDAQ: HLNE), a leading global private markets investment firm, today announced a strategic partnership that will make Hamilton Lane's institutional-grade private markets data, covering more than 70,000 funds, 240,000 assets and proprietary fund- and deal-level benchmarks built on decades of expertise as a private markets solutions provider, accessible within FactSet's portfolio analytics platform*.

Through this partnership, Hamilton Lane's proprietary data will be embedded directly into FactSet's analytics infrastructure, closing the gap that has long forced institutional investors to manage public and private portfolios on separate systems. The firm's benchmarks equip limited partners, institutions, financial advisors and researchers with institutional-grade data to evaluate and compare performance and identify trends, with transparency across strategies, vintage years and geographies within private markets.

"Private markets have become a central allocation for the world's most sophisticated investors, yet the tools available to analyze the whole portfolio have proven insufficient," explained David Mellars, Senior Director, Product Management at FactSet. “Institutional investors have long managed public and private portfolios in isolation. As allocators increasingly view their portfolios as a single, unified whole, the demand for systems, data, and analytics that span both asset classes has become critical. This partnership meets that demand head-on and gives users the ability to make better-informed allocation decisions across their entire portfolio in a single place."

The integrated solution is designed to deliver across three core capabilities:

- **Proprietary Benchmarking:** Hamilton Lane's indices and benchmarks, built on decades of high-quality private markets data, will be natively accessible within FactSet's performance measurement environment, providing a differentiated, transparent alternative to public index proxies, with the ability of clients to create and apply custom benchmarks directly within their existing workflows.

- **Enhanced Risk and Commitment Pacing Models:** The integrity of an investment decision begins with the integrity of the data behind it. Embedding Hamilton Lane's institutional-grade private markets data directly into FactSet's analytics infrastructure is intended to eliminate a fundamental bottleneck giving allocators the inputs, the engines, and the workflow to act with greater conviction across their entire portfolio.

- **Whole Portfolio Construction and Monitoring:** Clients can track public and private exposures in a unified view, with performance, attribution, and risk analytics that span asset classes, positioning FactSet as a true multi-asset class provider capable of delivering analytics across the entire portfolio.

Griff Norville, Head of Technology Solutions and Co-Head of Innovation at Hamilton Lane, commented, “Private markets are our sole focus, and have been for over 30 years. That singular dedication gives us a level of data depth and insight that's difficult to replicate. Yet our clients aren't managing private markets in isolation — they're overseeing entire portfolios. By partnering with FactSet, we can integrate our private markets expertise directly into the platforms investors already rely on, giving them a complete, unified view.”

Additional details on product availability and expanded capabilities will be shared in the coming months, and interested clients can learn more at www.factset.com and www.hamiltonlane.com.

*As of June 30, 2026

About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) supercharges financial intelligence, offering enterprise data and information solutions that help our clients maximize their potential. Our cutting-edge digital platform seamlessly integrates proprietary financial data, client datasets, third-party sources, and flexible technology to deliver tailored solutions across the buy side, sell side, wealth management, private equity, and corporate sectors. With over 48 years of expertise, a presence in 20 countries, and extensive multi-asset class coverage, we leverage advanced data connectivity alongside AI and next-generation tools to streamline

workflows, drive productivity, and enable smarter, faster decision-making. Serving more than 9,200 global clients and over 260,000 individual users, FactSet is a member of the S&P 500 dedicated to innovation and long-term client success. Learn more at www.factset.com and follow us on X and LinkedIn.

About Hamilton Lane

Hamilton Lane (Nasdaq: HLNE) is one of the largest private markets investment firms globally, providing innovative solutions to institutional and private wealth investors around the world. Dedicated exclusively to private markets investing for more than 30 years, the firm currently employs approximately 800 professionals operating in offices throughout North America, Europe, Asia Pacific and the Middle East. Hamilton Lane has $1.1 trillion in assets under management and supervision, composed of more than $146 billion in discretionary assets and $914 billion in non-discretionary assets, as of June 30, 2026. Hamilton Lane specializes in building flexible investment programs that provide clients access to the full spectrum of private markets strategies, sectors and geographies. For more information, please visit www.hamiltonlane.com or follow Hamilton Lane on LinkedIn.

Forward-Looking Statements

Some of the statements in this release may constitute "forward-looking statements" within the meaning of Section 27A of the Securities Act of 1933, Section 21E of the Securities Exchange Act of 1934 and the Private Securities Litigation Reform Act of 1995. Words such as "will," "expect," "believe," "estimate," "continue," "anticipate," "intend," "plan" and similar expressions, or the negative version of these words or other comparable words, are intended to identify these forward-looking statements. Forward-looking statements discuss management's current expectations and projections relating to, among other things, the terms and results of the strategic partnership. All forward-looking statements are subject to known and unknown risks, uncertainties and other important factors that may cause actual results to be materially different. For more information regarding the risks and uncertainties that Hamilton Lane faces, you should refer to the "Risk Factors" detailed in Part I, Item 1A of the firm's Annual Report on Form 10-K for the fiscal year ended March 31, 2026 and in its subsequent reports filed from time to time with the SEC, which are accessible on the SEC's website at http://www.sec.gov. The forward-looking statements included in this release are made only as of the date hereof. Hamilton Lane undertakes no obligation to update or revise any forward-looking statement as a result of new information or future events, except as otherwise required by law.

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