

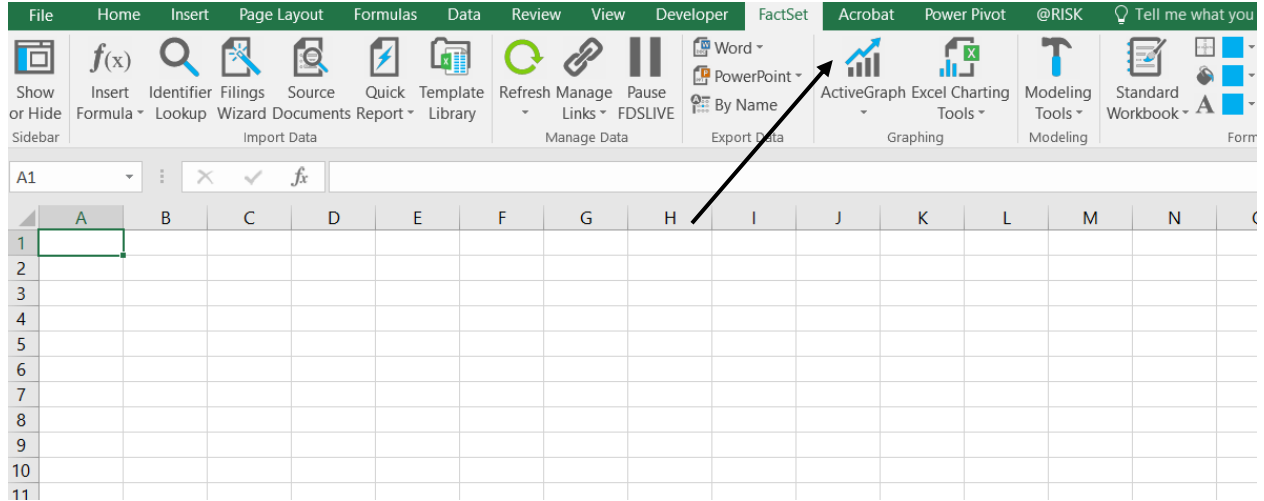


FactSet: Building Graphs

Created by: Tyson Corner '22

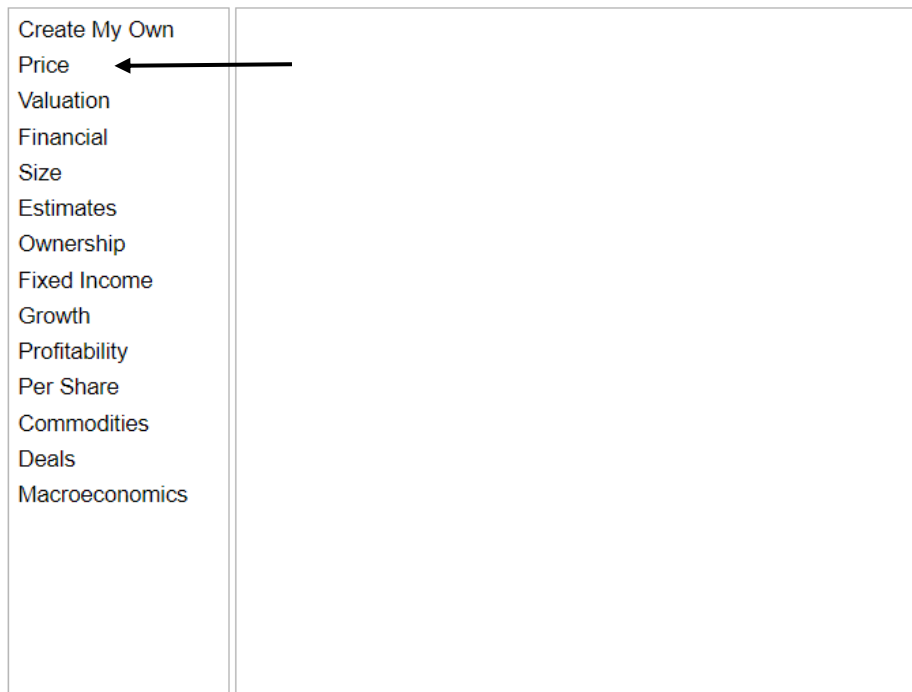
Building Graphs with FactSet

- 1) If you have FactSet on your laptop open up excel on your laptop otherwise you can use any of the Cutler Center Terminals and open excel
- 2) Click on the FactSet button on the ribbon
- 3) Click on the bars with a blue trend line above the Active Graph function



- 4) There are many options for types of charts and metrics that can be used. We will start with indexed price.
- 5) Click on "Price."

Choose a chart and click Next



- 6) To index an individual ticker against a benchmark, double click "Indexed Price (with Target Volume -Optional.)"

Choose a chart and click Next

Create My Own	Closing Price - Single or Multi-Company
Price	Closing Price - Dual Axis
Valuation	Indexed Price (with Target Volume - Optional) ←
Financial	Price Volume
Size	Price Volume Histogram
Estimates	Bull, Bear, Base
Ownership	Relative Strength
Fixed Income	Currency Exchange Rates
Growth	Exchange Ratio
Profitability	
Per Share	
Commodities	
Deals	
Macroeconomics	

7) In the "Target" section put the company name or ticker that you are interested in. For this example the target will be Facebook (FB)

Inputs

Annotations

Target

Comparables

All	Equity	ETF
Facebook, Inc. Class A FB-US	Equity	
Maxima LT UAB 06QZBR-E	Private Compan	
Facebook Ireland Ltd. 0CDZWJ-E	Private Compan	
Facebook, Inc. (Venture Capital) 08BG79-E	Private Equity	
Leverage Shares 2x Facebook ETP FB2-GB	ETF	
Leverage Shares Public Limited Company Leverage Shares -1x F... FRS-GB	ETF	

Period

Frequency

Index as of

Index by

End Labels

Advanced Options

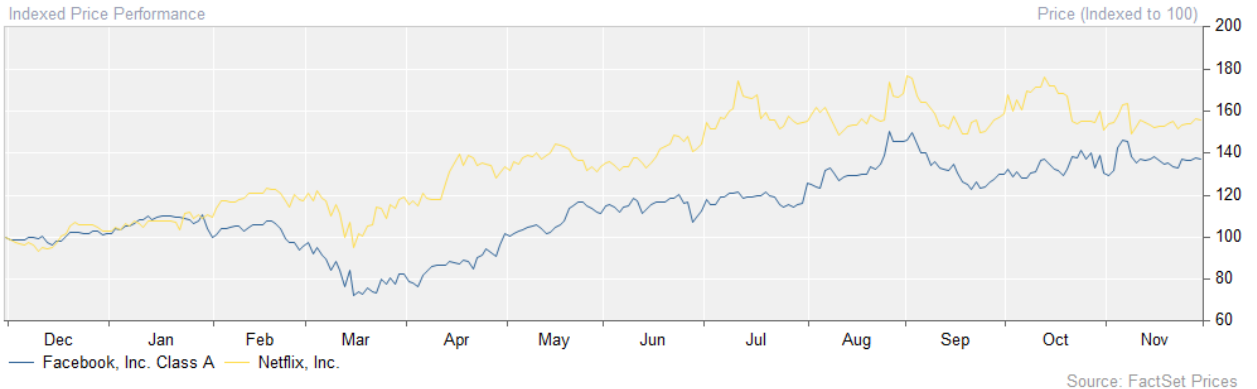
Show Secondary Listings

- 8) After selecting a target, you can then compare the target to peers, a group of stocks, or relevant benchmarks. For this example we will compare Facebook (FB) to the other FAANG stocks (compare them to Apple, Amazon, Netflix, and Google). To put in a comparison ticker go to the “Comparables” field and start inputting tickers (APPL, AMZN, NFLX, GOOGL).

ActiveGraph - Indexed Price (with Target Volume - Optional)

Facebook, Inc. Class A vs. Peers

Indexed Price Performance



Inputs Annotations

Target: FB-US [Search] [Reset]

Show Target Volume in: None [Reset]

Comparables: NFLX-US [Search] [Settings] [Reset]

- 9) To insert additional “Comparables” simply highlight and delete the ticker name in the “Comparables” section and begin typing a new ticker, FactSet will hold on to the old tickers data unless you choose to exclude it later.

- 10) Once you have all the “Comparables” you want in you can click the down arrow key by “Comparables” to see whether or not you want to remove any. To remove simply click the “x” by the ticker in the drop down.

Facebook, Inc. Class A vs. Peers

Indexed Price Performance



Inputs Annotations

Target: FB-US [Search] [Reset]

Show Target Volume in: None [Reset]

Comparables: AAPL-US [Search] [Settings] [Reset]

Period: All Equity [Close]

Netfix, Inc. NFLX-US	Equity	
Alphabet Inc. Class A GOOGL-US	Equity	
Amazon.com, Inc. AMZN-US	Equity	
Apple Inc. AAPL-US	Equity	[X]

Print Series

To remove a name.

11) Next you'll want to select a date range. Go to the "Period" section and select YTD for year-to-date return

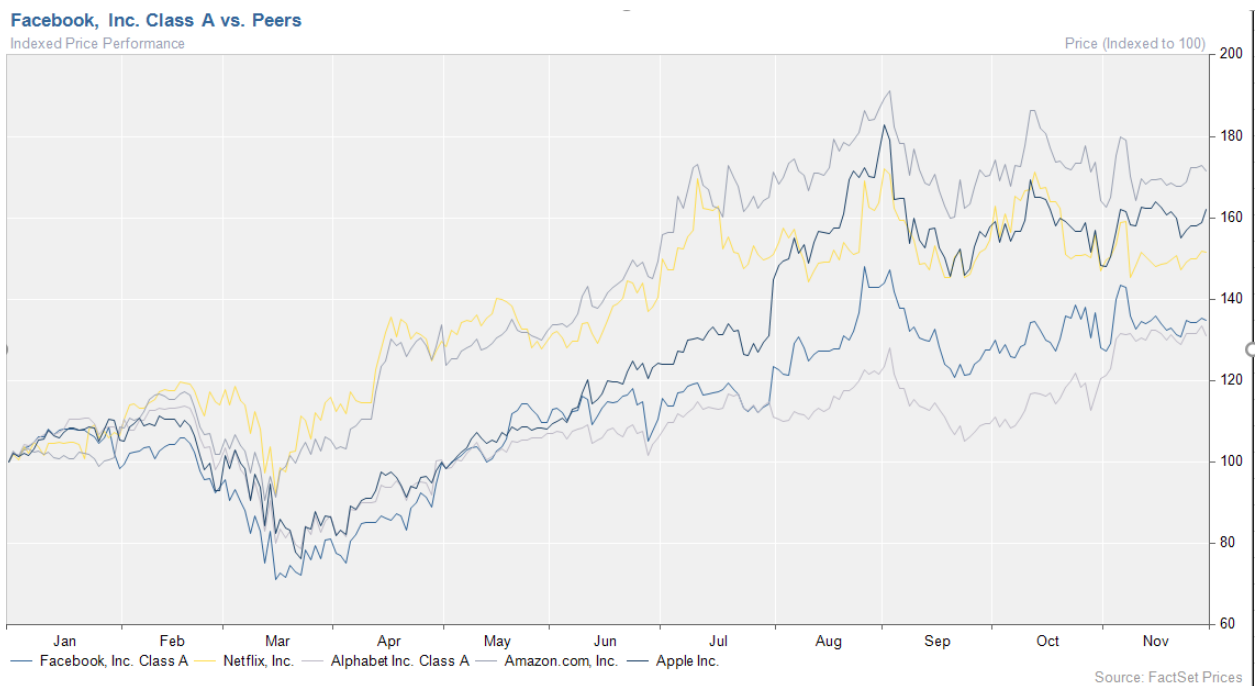
Period	YTD 3M 6M 9M 1Y 2Y 3Y 5Y 10Y 20Y 30Y All Data Custom
Frequency	Daily <input type="button" value="R"/>
Index as of	1/1/0 <input type="button" value="R"/>
Index by	<input checked="" type="radio"/> Index <input type="radio"/> Price Index Value <input type="text" value="100"/>
End Labels	None
<input type="button" value="+ Add Series"/>	

12) Next is "Frequency". Daily is the default "Frequency" metric and it is usually good, but if you want monthly or yearly depending on your return analysis timeframe click the down arrow by daily and select a different "Frequency."

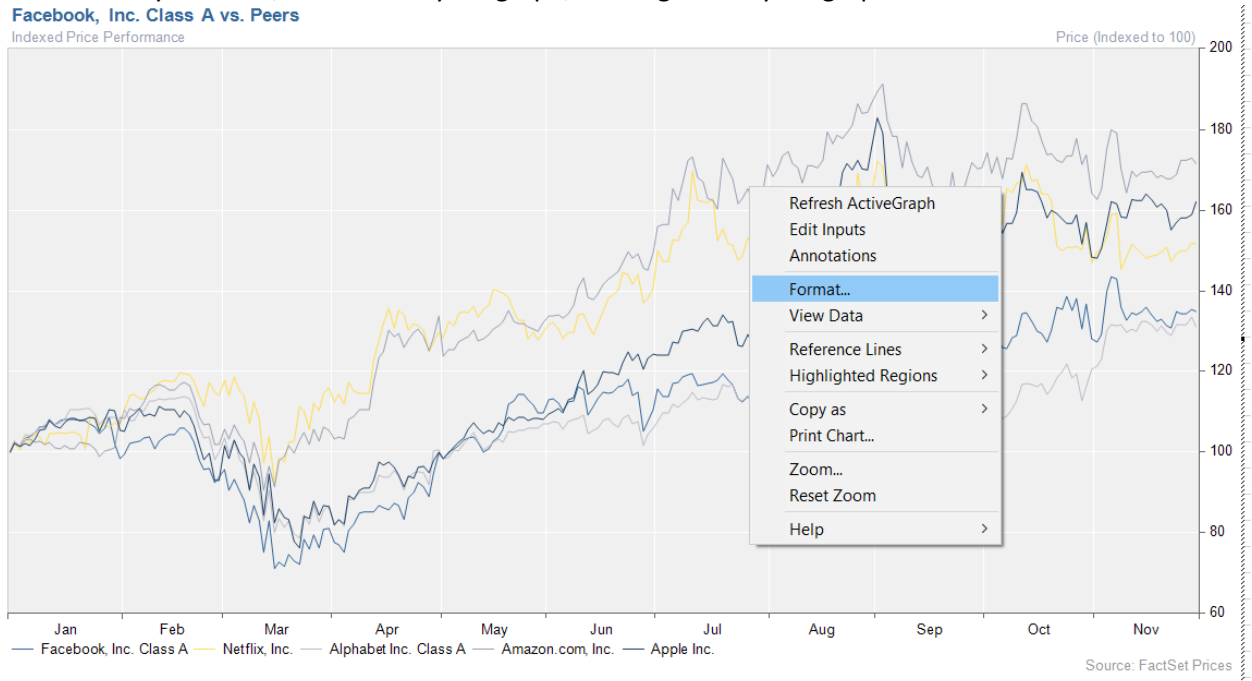
Frequency	Daily <input type="button" value="R"/>
Index as of	<input type="button" value="R"/>
Index by	
End Labels	
<input type="button" value="+ Add Series"/>	

- Daily
- Weekly
- Monthly
- Calendar Qtr
- Fiscal Qtr
- Calendar Year
- Fiscal Year

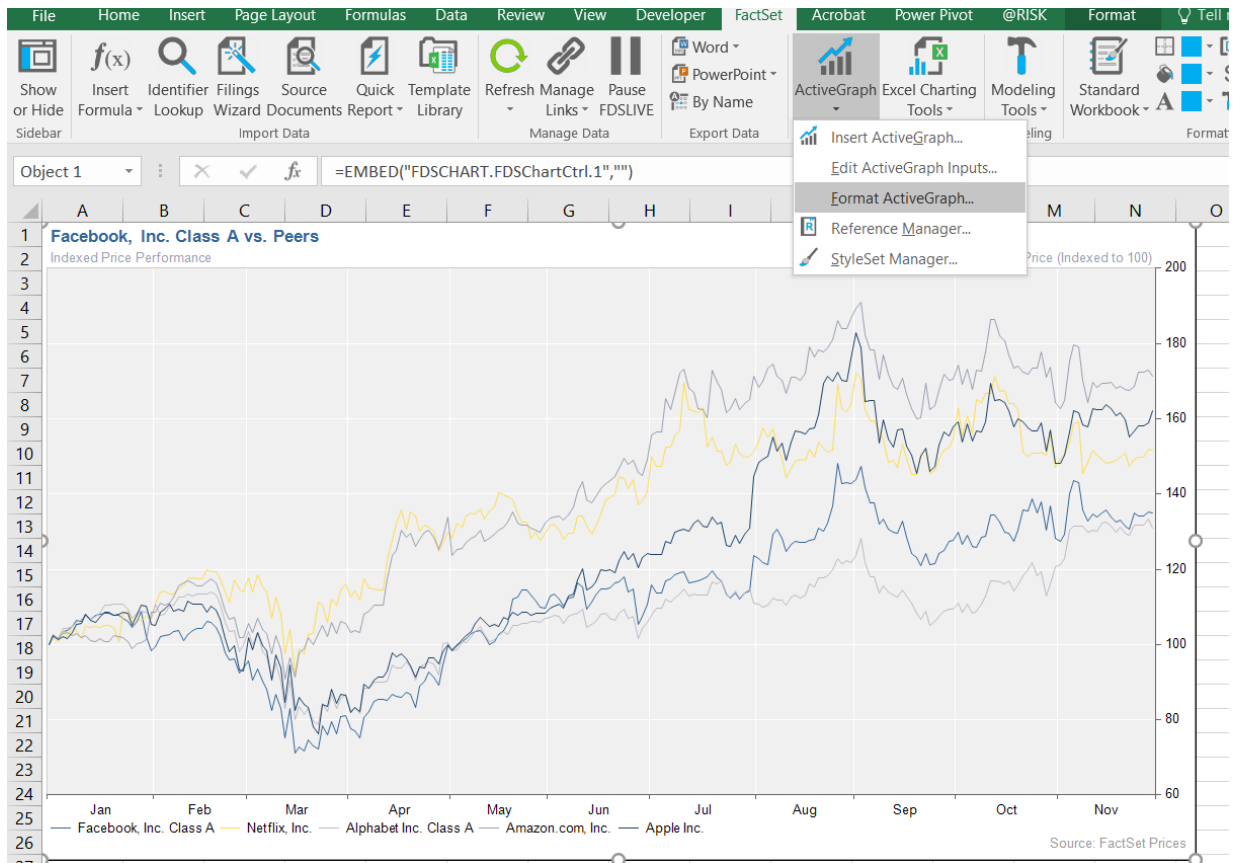
13) Click "Ok" at the bottom right and a graph will be created in Excel.



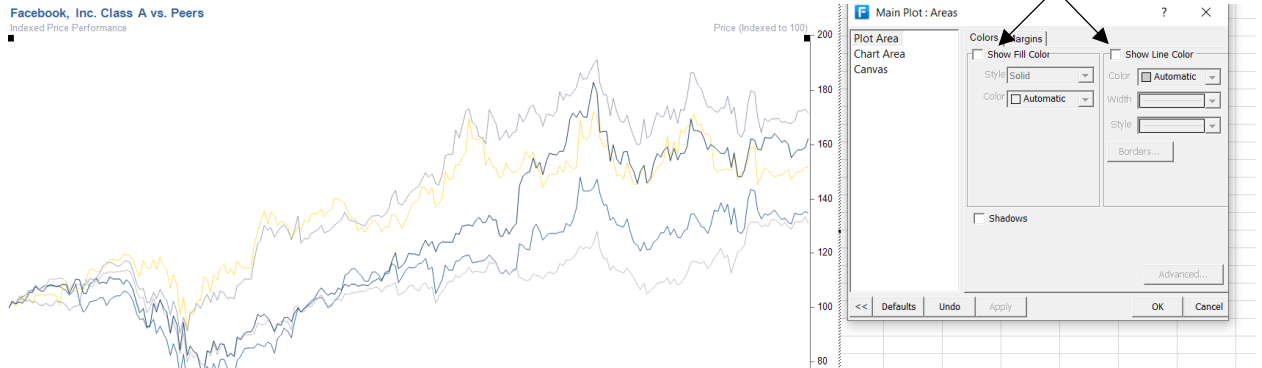
14) This graph is the base graph that FactSet spits out and it is not very appealing to the eyes, luckily edits are easy. To start, double click your graph, then right click your graph and click "Format."



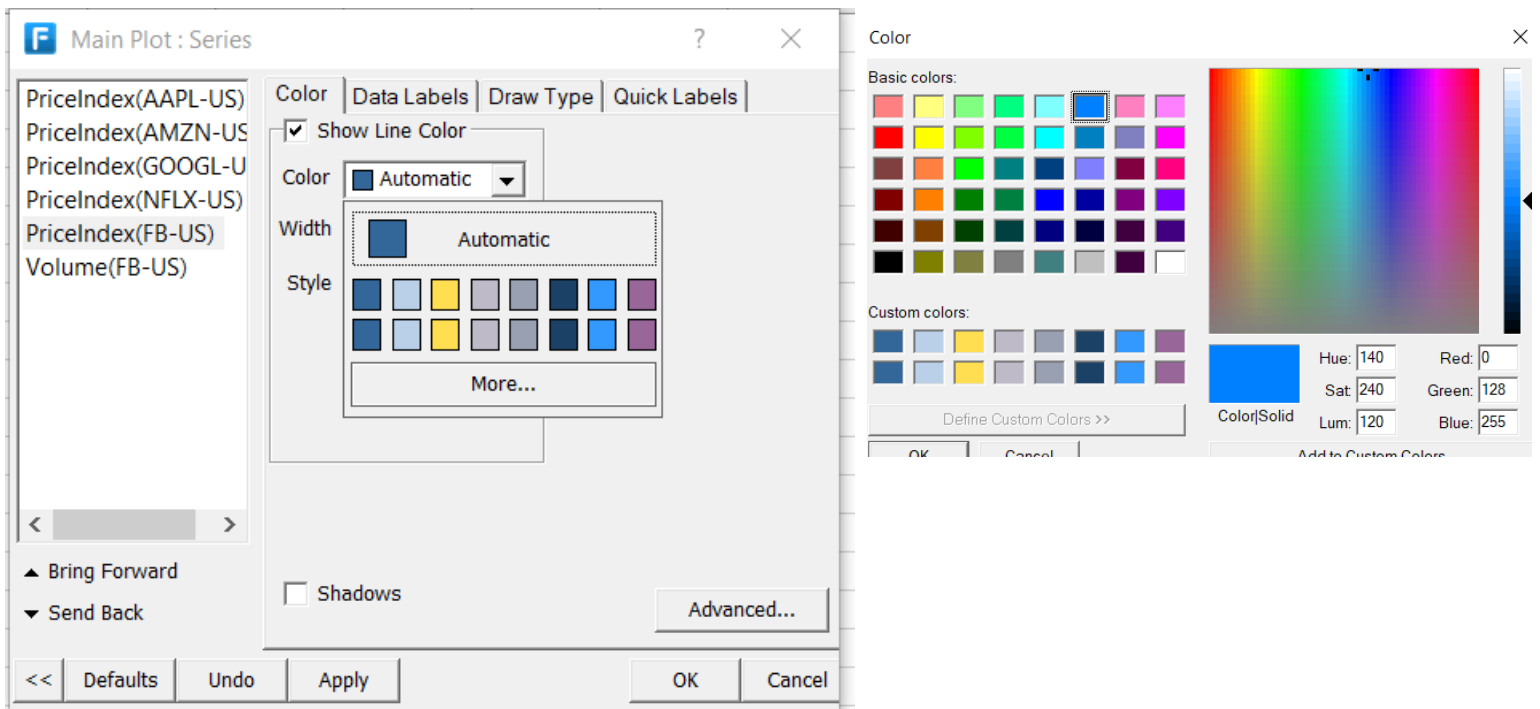
15) The other option is to left click once on your graph, select the drop down arrow by the Active Graph symbol, and select "Format Active Graph."



16) Once you are in formatting mode, the fastest way to format an Active Graph is to click on the sections you want to format. To start click on the background of your graph and uncheck “Show Fill Color” and “Show Line Color,” then click “Apply” and the gray grid will go away.

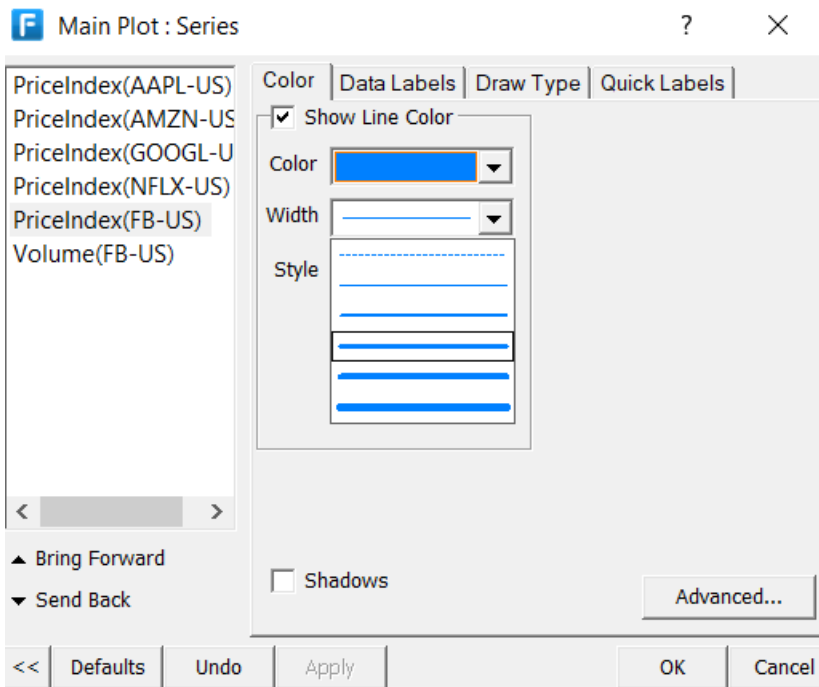


17) Next, let’s change the line colors so that they are all clearly different from each other. Click on a trend line and you will be taken to that section of formatting. Hover over trend lines to see which ticker they correspond to and pick the Facebook trend line. The first option will be color. It will say “Automatic” next to it. Click the drop down menu, select “More...” and pick a color or enter a custom RGB code. I chose the lighter blue.



18) Once you select or input a color, select “OK” and then press “Apply”

19) Next change the width so that the lines are a little clearer, with five lines I suggest the median width, which is the fourth width option.

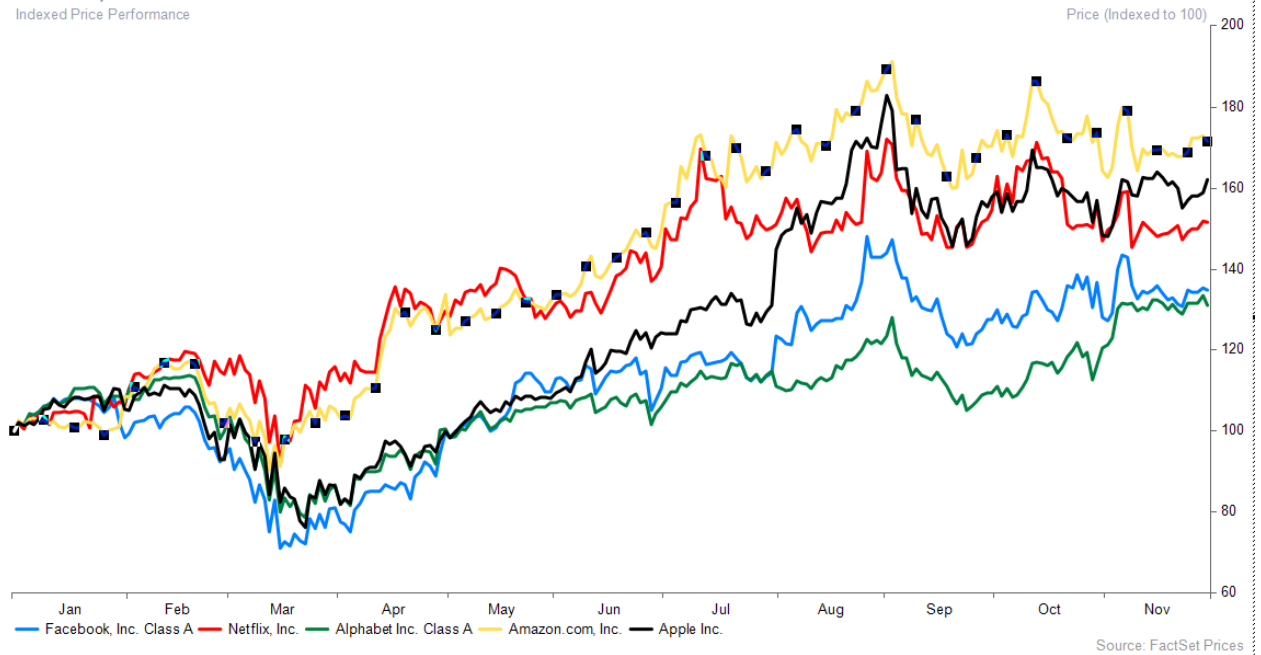


20) Click on the width and click "Apply," your graph should look like the one below now.



21) Do this to every trend line.

Facebook, Inc. Class A vs. Peers
Indexed Price Performance

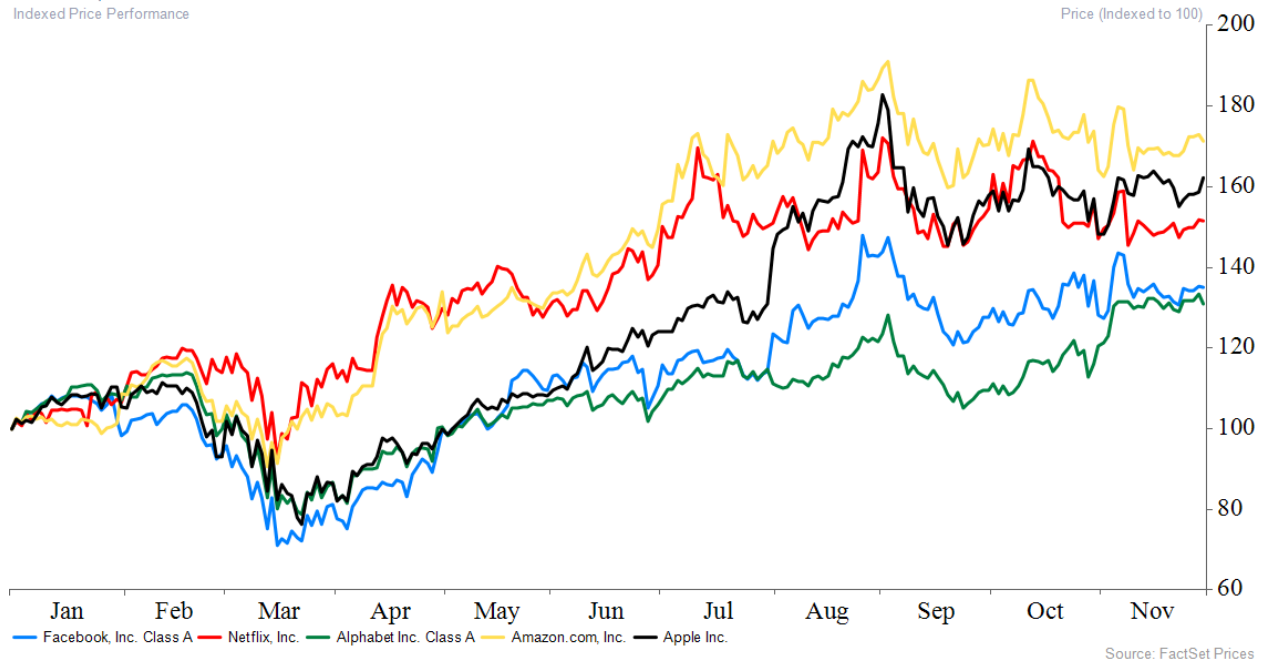


22) You also have the option of changing the text and layout of the x and y axis. Again to format, simply click on the axis. Start with the X axis which is in months. Once in select the labels section and change the font to Times New Roman and the Font Size to 14. Click “OK” and “Apply.”

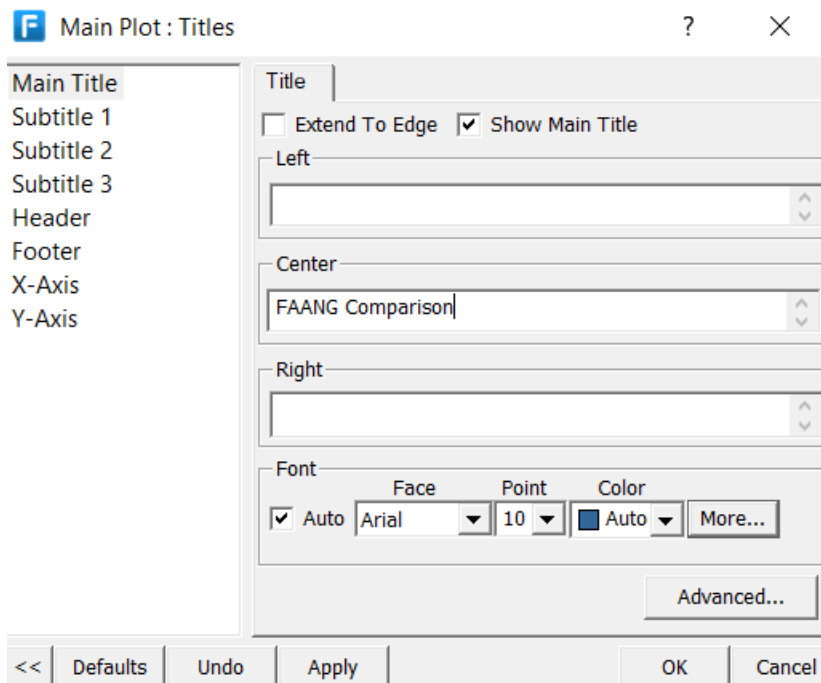
The image shows two side-by-side screenshots of the 'Main Plot : Axes' dialog box. Both screenshots have the 'Labels' tab selected. In the left screenshot, the 'X-Axis' is selected, and the font face is set to 'Times New Roman' and the point size is '14'. In the right screenshot, the 'Y-Axis' is selected, and the point size is '14'. Both screenshots show the 'Show Labels' checkbox checked and the 'Orientation' set to 'Horizontal'. The 'Font' section includes a 'Face' dropdown (Times New Roman), a 'Point' dropdown (14), and a 'Color' dropdown (Auto). Buttons for 'Advanced...', 'OK', 'Cancel', 'Apply', and 'Defaults' are visible at the bottom of the dialog boxes.

23) Do the same thing to the Y axis. Your new graph should look similar to the one below.

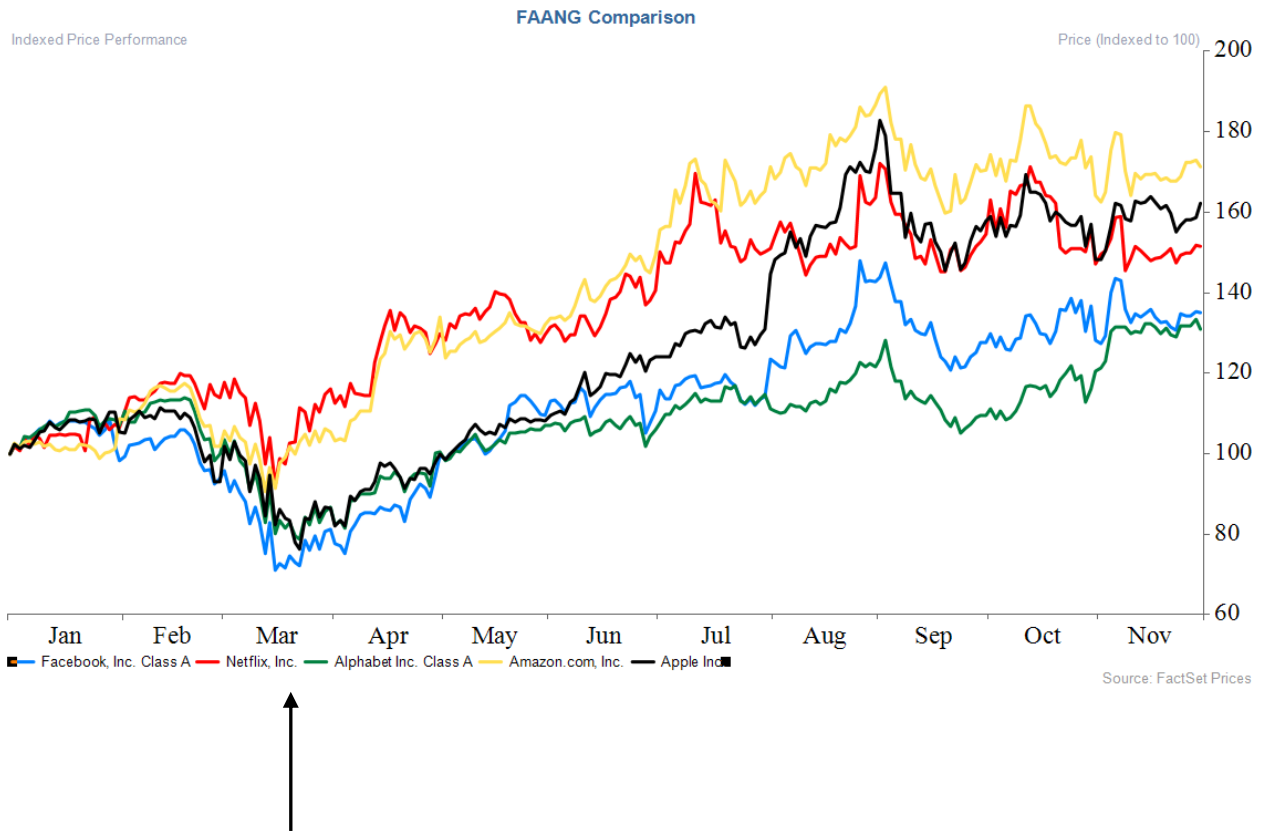
Facebook, Inc. Class A vs. Peers
Indexed Price Performance



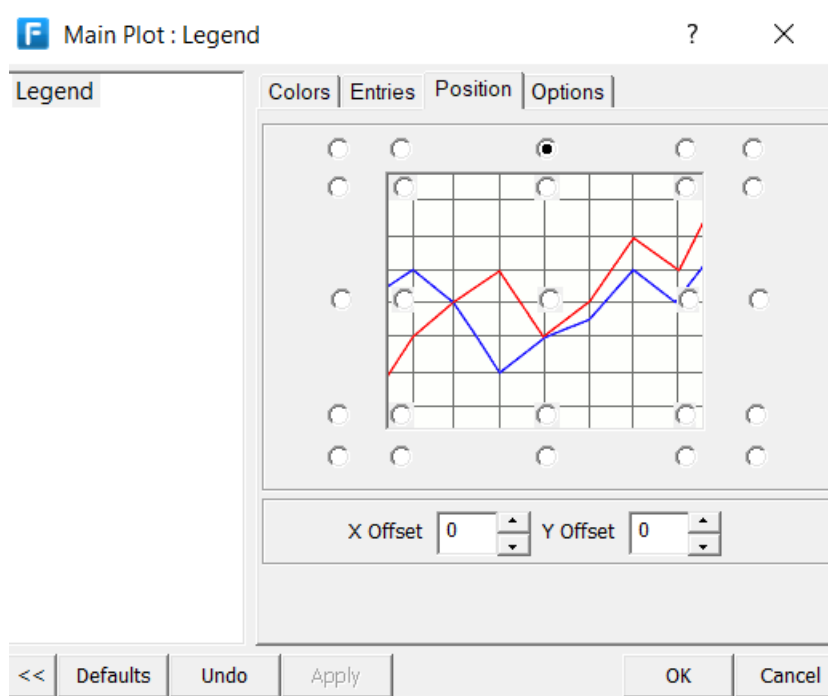
24) You can also change the title of the graph by clicking on the top title. Let's change the title to "FAANG Comparison" and put it in the middle of the chart. To do this delete the text that appears in the "Left" section. Then write "FAANG Comparison" in the "Center" section. You can also change the font type and size. Let's make it Times New Roman, size 18. Click "Apply."



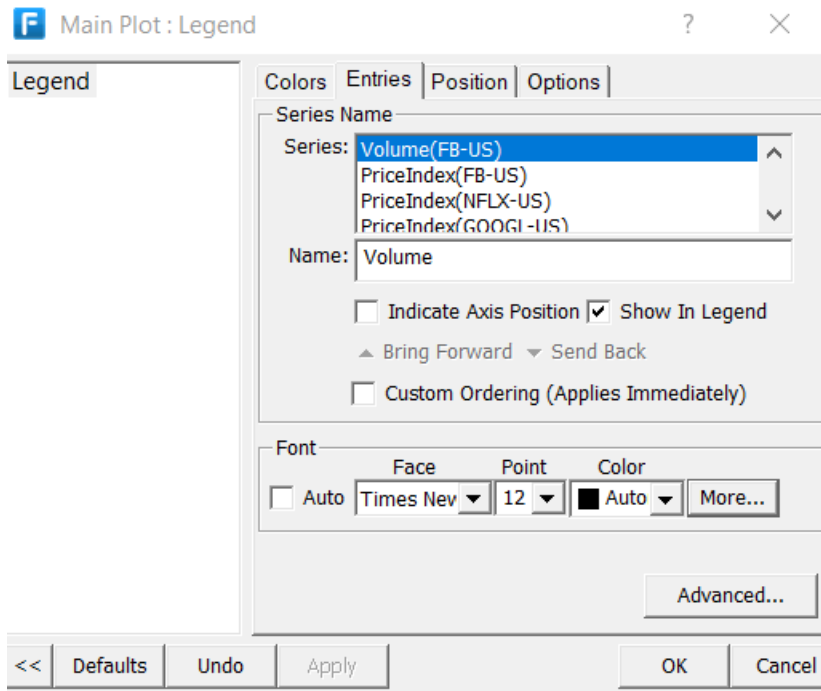
25) Additionally, you can change the position and size of the companies' names. Let's put the names in the middle and make them Times New Roman size 14. To do this highlight the bottom where all of the companies' names are.



26) To put the companies' names in the middle, click on the "Position" tab and select the middle dot that is above the graph image as seen below. Then click "Apply."

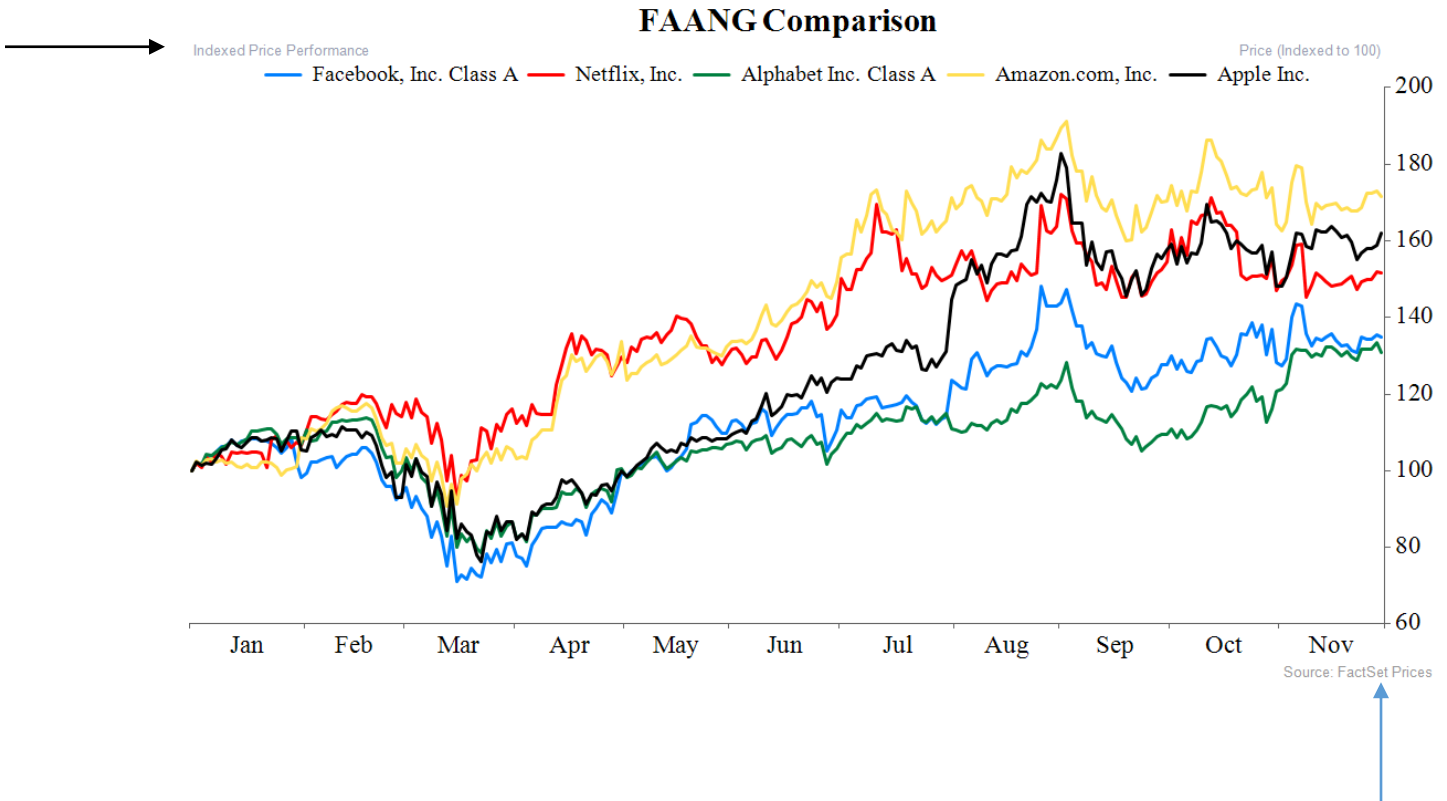


27) To change the font type and size, click the "Entries" tab. Change the type to Times New Roman and because there are 5 entries, they will not all fit on one line at size 14 so make them smaller (size 12).

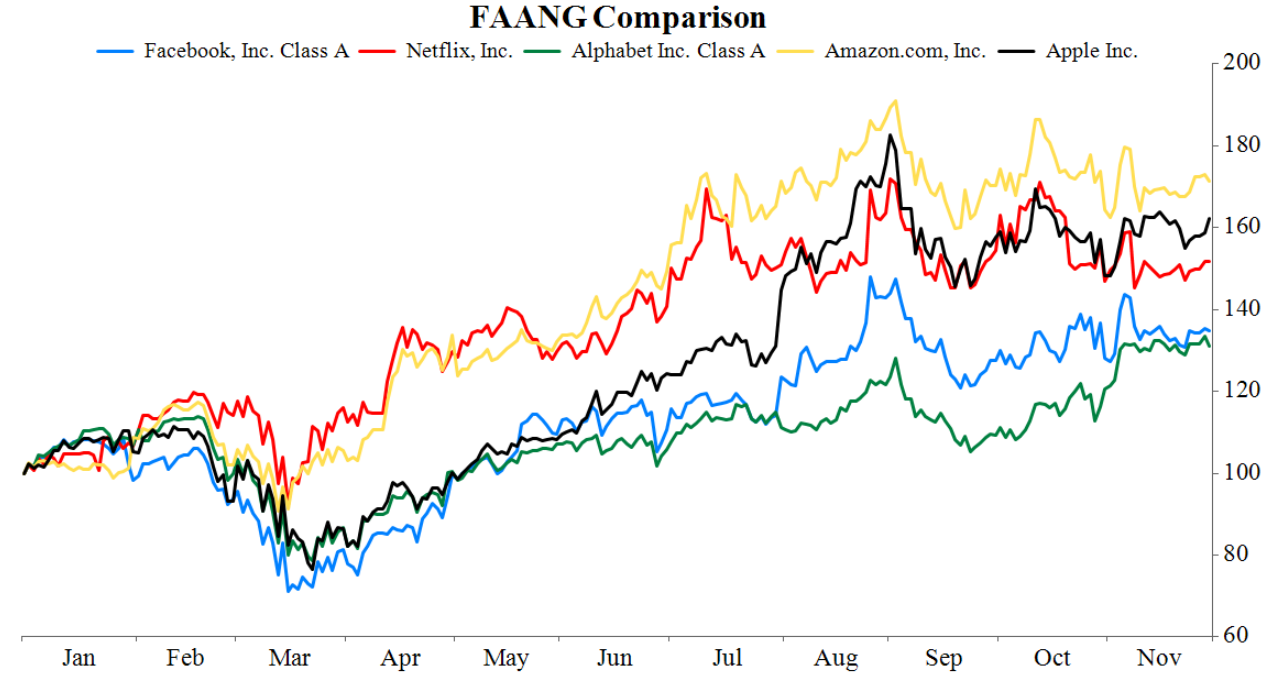


28) Your graph should now look like this.

You can remove the subtitle and footer by selecting them and unchecking the “Show Footer” section and hitting “Apply”. The footer is indicated by the blue arrow below. Click on the subtitle and uncheck “Show Subtitle 1” and hit “Apply.” The subtitle is indicated by the black arrow.



29) Your final product will look something like this.



30) Compare this to the original

