



## FactSet Launches AI Doc Ingest for Cobalt, Transforming Private Capital Data Collection with AI-Powered Automation

February 4, 2026

**By eliminating the need for client-side model training, private capital firms can now gain speed, accuracy, and data transparency with a new automated solution for ingesting portfolio company documents**

NORWALK, Conn., Feb. 04, 2026 (GLOBE NEWSWIRE) -- FactSet (NYSE:FDS | NASDAQ:FDS), a global financial digital platform and enterprise solutions provider, today announced the beta release of AI Doc Ingest for Cobalt, a powerful AI-powered solution designed to revolutionize portfolio company data collection for private capital managers.

“Private equity, growth, venture capital, and private credit firms have long struggled with fragmented, manual portfolio data collection, relying on rigid templates, cumbersome plugins, and repeated reconciliations between teams. As portfolios expand and the demand for trustworthy AI-ready data increases, these inefficiencies compound, slowing reporting cycles, valuations, and other downstream workflows, and increasing operational risk,” **said Emily Monaghan, Senior Vice President and Senior Director, Private Capital at FactSet.** “FactSet has consistently invested in cutting-edge AI technology to address these challenges and lead the industry forward. With AI Doc Ingest for Cobalt, FactSet is delivering a breakthrough solution that automates data extraction and ingestion, reflecting our commitment to innovation and helping clients unlock greater accuracy, transparency, and efficiency in their reporting and investment workflows.”

FactSet’s AI Doc Ingest for Cobalt eradicates private capital workflow bottlenecks with a frictionless workflow that enables clients to securely upload raw source files and effortlessly extract, validate, and publish structured data, regardless of file format or changing document structures. By harnessing AI technology that, unlike competitors, needs no client-side training, AI Doc Ingest adapts instantly to evolving reporting formats, thereby removing hidden costs and reducing onboarding time.

This empowers firms with high volumes of source documents to unlock granular, real-time insights that would otherwise take hours to unearth or remain buried in opaque, disconnected files, giving private capital professionals a measurable edge in reporting accuracy, speed, and investment analysis.

Unlike competitive offerings reliant on legacy workflows and technology, or requiring costly, time-consuming model training, FactSet’s AI Doc Ingest leverages advanced AI capabilities in the market to extract data from PDFs, Excels, board decks, and other source files, then transforms it into a flexible, client-defined data model within Cobalt’s Portfolio Monitoring platform. This seamless workflow powers clients’ use of that data for reporting and analytics, valuations, and consumption through AI tools and workflows.

With the addition of Doc Ingest capabilities, key benefits are now available via FactSet’s Cobalt Portfolio Monitoring Platform:

- **Dramatic Reduction in Manual Effort:** Alleviates repetitive data entry for deal teams and streamlines data sharing for portfolio companies, condensing multi-day processes into minutes.
- **Superior Data Accuracy and Transparency:** AI-powered extraction minimizes human error; all extracted data is instantly traceable back to its source document through audit trails, enabling seamless validation and auditability.
- **Accelerated Reporting Cycles:** Enable faster LP, internal, and regulatory reporting, even as portfolios scale and complexity grows.
- **Built to Scale and Adapt:** No model training required; adapts evolving document formats while preserving the details in portfolio company financial statements and KPIs.
- **Integrated Directly into Cobalt Workflow:** Immediate, intelligent mapping to company data models, ensuring that clients invest their time in analysis, not administration.

“Early beta users, including multinational private equity firms, mid-market growth investors, and venture capital managers, have seen dramatic improvements in both efficiency and usability,” **said Monaghan.** “Clients report reducing formerly multi-day document processes to just minutes, while investment teams appreciate eliminating tedious manual mapping and gaining the flexibility to review and selectively import financial data. Across the board, beta users have praised the intuitive validation interface and the ability to view extracted metrics side-by-side with their source documents, helping them streamline workflows and maintain confidence in their reporting.”

AI Doc Ingest for Cobalt is available in beta to select clients in North America, with general release scheduled for March 2026. Rollout is planned for Europe in late spring 2026.

Learn more about FactSet’s Cobalt Portfolio Monitoring Platform and its AI capabilities: <https://www.factset.com/marketplace/catalog/product/portfolio-monitoring-platform>.

### About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) supercharges financial intelligence, offering enterprise data and information solutions that

power our clients to 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 47 years of expertise, offices in 19 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 9,000 global clients and over 239,000 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](http://www.factset.com) and follow us on [X](#) and [LinkedIn](#).

Investor Relations:

Kevin Toomey

+1.212.209.5259

[Kevin.Toomey@factset.com](mailto:Kevin.Toomey@factset.com)

Media Relations:

Kelsey Goldsmith

+1.207.712.9726

[Kelsey.Goldsmith@factset.com](mailto:Kelsey.Goldsmith@factset.com)

The logo for FactSet, featuring the word "FACTSET" in a bold, blue, sans-serif font.