



## FactSet Accelerates Innovation in Banking with Launch of a New AI-Native Solution in Partnership with Finster AI

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**FactSet also announces an investment in Finster AI**

NORWALK, Conn., March 30, 2026 (GLOBE NEWSWIRE) -- FactSet (NYSE:FDS | NASDAQ:FDS), a global financial digital platform and enterprise solutions provider, today announced the alpha launch of FactSet AI for Banking, an AI-powered workflow automation ecosystem. Built in collaboration with Finster AI, FactSet's AI solution for banking gives investment banking teams and, more broadly, research and sell-side firms, a unified, secure environment that automates complex deal processes and unlocks new data-driven insights. Concurrently, FactSet announced an investment in [Finster AI](#), deepening its strategic commitment to next-generation innovation.

This launch marks a bold move by FactSet to reimagine both the established market data and emerging AI agent landscapes, cementing FactSet's leadership in AI-driven solutions for institutional finance.

"At FactSet, we envision a future in which powerful intelligence and AI agents seamlessly enhance one another; where, in an ever-evolving landscape, trust in core systems is more essential than ever as clients seek insights at pace," **said Kate Stepp, Chief AI Officer at FactSet.** "With FactSet's new AI solution for banking, we are delivering an agentic ecosystem that unlocks seamless access to an unprecedented array of datasets, proprietary agents, and task automation capabilities, all in direct support of our banking and research clients' most critical goals. FactSet's solution embodies our commitment to innovation and trust, empowering clients to move confidently from insight to action wherever those decisions are made."

FactSet's AI solution for banking is positioned at the intersection of traditional market data providers and standalone, off-the-shelf AI agent solutions that often require users to juggle numerous disconnected tools. FactSet's AI solution for banking provides a unified, purpose-built workflow in regulated environments. Through natural language prompts, it orchestrates the production and synthesis of critical transaction assets and other complex processes across the entire deal lifecycle, delivering full traceability.

Designed to transform bankers' ability to focus on high-value tasks, the multiple agents within FactSet's AI solution for banking streamline the proactive, trigger-based generation of pitch materials, company profiles, memos, deep research, and buyer/seller analysis, among other specialized investment banking workflows.

"This advancement signifies FactSet's unwavering commitment to solving the daily challenges of bankers," **said Kristina Karnovsky, Executive Vice President of Dealmakers & Wealth at FactSet.** "With multiple trigger-based agents and broad UX interoperability, combined with an industry-leading breadth of data, FactSet's AI solution for banking empowers investment banking teams to focus on higher-value activities: delivering differentiated insights and deepening client relationships. By embedding intelligent automation within workflows, bankers can rapidly move from idea to execution, expanding deal capacity while delivering increased quality of every client interaction."

FactSet's AI solution for banking is available through FactSet Workstation, with seamless integration into Microsoft Office Suite, and as a virtual private cloud or single tenant deployment, configurations designed to meet the rigorous requirements of highly regulated financial sectors. The solution delivers comprehensive, auditable task automation and workflow connectivity, harnessing the latest advancements in both agentic and generative AI through technical collaboration with Finster AI and FactSet's own internal AI experts, led by FactSet's recently appointed Chief AI Officer, Kate Stepp.

Powered by FactSet's trusted data, and offering clients the flexibility to incorporate proprietary insights, this alpha launch affirms FactSet's commitment to streamlining banking workflows—from origination and research to execution and client delivery.

This open architecture and flexible user interface empower clients to go beyond FactSet's extensive data universe. In addition to leveraging the full breadth of content available from FactSet, clients are welcome to bring their own Model Context Protocols (MCPs) and other critical data sets to FactSet's AI solution. This flexibility enables the FactSet AI solution for banking to serve as a unified "single pane of glass," delivering seamless access, supervision, and workflow automation across all essential investment banking content sets, regardless of source.

"We are incredibly proud to partner with FactSet, an industry stalwart that has defined financial data and analytics for decades," **said Sid Jayakumar, CEO of Finster AI.** "FactSet's vision for AI aligns deeply with our belief that the future of finance will be driven by intelligent AI agents operating natively within workflows, underpinned by a secure data ecosystem. Together, we are bringing that vision to life for investment banks."

FactSet AI for Banking is now available in alpha for select clients, with broader rollout planned through 2026. Full functionality details are available here: [www.factset.com/marketplace/catalog/product/factset-ai-for-banking](http://www.factset.com/marketplace/catalog/product/factset-ai-for-banking).

## 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](#).

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