



FactSet Expands Model Context Protocol Suite to Portfolio Analytics

June 26, 2026

Investment teams can now access trusted, pre-calculated analytics through conversational and agentic AI interfaces, extending governed, audit-ready outputs to AI-native workflows

NORWALK, Conn., June 26, 2026 (GLOBE NEWSWIRE) -- FactSet, a leading global data and AI solutions provider to the financial markets, today announced the limited release of the FactSet Portfolio Analytics MCP, bringing widely trusted portfolio analytics into conversational and agentic AI workflows. The new tool will provide buy-side investment professionals with broader access to governed performance, attribution and risk insights without rebuilding data pipelines or compromising governance.

Portfolio analytics has long been central to how buy-side firms measure performance, manage risk, and meet reporting obligations. The solution extends these validated, audit-approved outputs, relied upon as a book of record by investment teams globally, into AI-native environments.

Portfolio Analytics MCP will serve as an additional distribution method for analytics already in use, broadening access across organizations and building upon FactSet's existing analytics infrastructure. The tool will also provide pre-calculated, approved results through natural language and agentic interfaces. Underlying this is a semantic and metadata layer that keeps AI-powered queries anchored to official and consistent outputs. Other features and capabilities of the solution include:

- **Natural language and agentic querying:** Users can query approved analytics conversationally, without manual workflow navigation or software builds.
- **Enterprise-level AI Ready Data:** Results are delivered inside clients' private LLM environments, keeping AI-powered workflows grounded in audit-friendly, book-of-record data.
- **Developer support:** Engineering and architecture teams can build proprietary agents and AI applications on top of FactSet's industry-leading analytics without custom integrations.
- **Seamless research integration:** Company-specific portfolio analytics connect directly into fundamental and quantitative research solutions developed by FactSet or by users.
- **Reduced setup complexity:** A guided semantic and metadata layer steers users toward approved outputs, minimizing configuration overhead.

"Flexible, seamless and open access to FactSet's industry-leading portfolio analytics has been a guiding principle as we work continuously to meet the needs of our clients. The new FactSet Portfolio Analytics MCP brings governed analytics to a wider audience within our clients' ecosystems and AI-native workflows, extending what they already trust, without compromising the auditability and consistency they depend on," - said David Mellars, Head of Portfolio Analytics at FactSet.

FactSet Portfolio Analytics MCP builds on FactSet's expanding suite of AI-ready data capabilities — including unstructured data MCP, vectorized data API, Event Hub, and Intelligent Document Service — giving clients access to a wide breadth of governed, enterprise-grade data they need to power AI solutions across their enterprises.

Learn more at <https://www.factset.com/marketplace/catalog/product/portfolio-analytics-mcp>.

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 241,000 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](#).

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