

AI in Capital Markets Awards 2025 Winners' Report

About AI in Capital Markets Awards 2025

We are delighted to announce the winners of the inaugural AI in Capital Markets Awards. These awards were created to recognise the AI and machine learning solutions that deliver tangible, real-world value to financial institutions across the globe.

In capital markets, AI has clearly moved from a speculative technology to a practical tool for gaining a competitive edge. This year's award recipients are prime examples of this shift, demonstrating how intelligent automation can be applied to solve the industry's most complex challenges.

Our winners were recognised for their innovative work across four key areas: Data Management, Trading Technology, RegTech, and ESG. Their solutions are helping firms to improve operational efficiency, strengthen compliance and risk management, and support the market's move towards sustainable growth.

We would like to thank all the technology providers who submitted entries. The quality of the solutions was consistently high, making the selection process a challenging one for our editorial team and advisory board.

Our congratulations go to all the winners. In a competitive field, their solutions stood out as a testament to their innovation and hard work in advancing the practical application of AI in finance.

To continue the discussion on AI's impact, we also invite you to join us at our upcoming summits. Mark your calendars for the **AI in Data Management Summit** in New York City on March 19, 2026, and the **AI in Capital Markets Summit** in London in May 2026, to explore the latest trends and solutions.

If you'd like your company to be considered for future AI in Capital Markets Awards, you can find more information [here](#). You'll be able to sign up for notifications when nominations open or submit your entry if they are already being accepted.



Andrew Delaney
President & Chief Content Officer
A-Team Group

I'd personally like to thank our advisory board for their time and valuable input.

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Founder and CEO, Data4Real, LLC

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Financial Crime Strategy & Change Lead, Starling Bank

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Programme Delivery Manager – Data Warehouse & Analytics, Old Mutual Wealth

Bloomberg

Winner: Best AI Solution for Historical Data Analysis

BQuant unlocks the potential of Bloomberg's industry-leading financial data and advanced analytics, enabling users to uncover deeper insights and respond faster to rapidly evolving markets.

BQuant Desktop, included with Bloomberg Anywhere subscriptions, is a turnkey platform for building, testing, and sharing investment strategies. Running on Bloomberg-managed infrastructure, it offers a Python-based coding environment with access to open-source data science libraries, sample notebooks, and Bloomberg's vast datasets—enabling Bloomberg Anywhere users to incorporate quantitative approaches in their investment processes.

Users can publish BQuant Desktop projects as applications directly to the Bloomberg Launchpad of their permitted colleagues, transforming financial strategies into interactive, code-free tools. This facilitates team collaboration while maintaining full access control, versioning, and updates of the published BQuant application.

For firms needing greater scale of compute and deeper integration with their internal infrastructure, BQuant Enterprise extends these capabilities by offering dedicated clusters with advanced computing power. BQuant Enterprise supports seamless integration with customers' proprietary data and internal systems and enables distribution of research within the enterprise.

Whether you're developing alpha strategies, risk models, or interactive dashboards, BQuant delivers a flexible analytics solution built for the demands of today's investors.



James Jarvis: BQuant, Product Manager

About Bloomberg

Bloomberg

Bloomberg is a global leader in business and financial information, delivering trusted data, news, and insights that bring transparency, efficiency, and fairness to markets. The company helps connect influential communities across the global financial ecosystem via reliable technology solutions that enable our customers to make more informed decisions and foster better collaboration. For more information, visit [Bloomberg.com/company](https://www.bloomberg.com/company) or [request a demo](#).

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www.a-teaminsight.com

Bloomberg

Bloomberg BQuant Wins A-Team AICM Best AI Solution for Historical Data Analysis Award

When global markets were roiled by the announcement of massive US trade tariffs, Bloomberg saw the amount of financial and other data that runs through its systems surge to 600 billion data points, almost double the 400 billion it manages on an average day.

"These were just mind-blowingly large volumes of data," says James Jarvis, Bloomberg BQuant Desktop Product Manager. "Add to that the unstructured data that we receive through Bloomberg News and other sources. It's a vast quantity of data."

Far from being overburdened by such data overload, however, the company's clients are able to take that information in their stride and make valuable and actionable sense of it all. Bloomberg's BQuant turnkey quantitative analysis and data science solution is a suite of tools that enable financial institutions to integrate large volumes of data into a programmable environment where they can create analytics and other workflows to help inform their investment decisions and aid in other critical use cases.

AI Capabilities

Introduced about eight years ago, BQuant builds on a host of Bloomberg functionality, including its artificial intelligence capabilities that the company has been developing for deployment in its products since 2009.

BQuant's ability to tap Bloomberg's vast pools of data and apply that information to multitudinous uses has made it a winner of A-Team Group's AI in Capital Markets Best AI Solution for Historical Data Analysis Award.

These awards were created to recognise the AI and machine learning solutions that deliver tangible, real-world value to financial institutions across the globe. Winners were recognised for their innovative work across data management, trading technology, RegTech and ESG.

BQuant is available as BQuant Desktop, within the Bloomberg Anywhere subscription, and BQuant Enterprise.

BQuant Desktop gives enabled Bloomberg Terminal users programmatic access to Bloomberg data and analytics in a secure sandbox environment, where they can quickly develop and refine different strategies, enabling them to get new ideas to market fast.

BQuant Enterprise is a fully managed, cloud-based analytics platform that enables financial institutions to scale investment workflows with advanced compute power, broad access to Bloomberg data, integration with their own internal systems, and seamless collaboration.

Flexibility is Key

AI is also deployed to generate intelligent metadata that makes the underlying data usable, traceable and, importantly, trusted. As well, it makes possible sentiment analysis and pattern recognition to power investment research.

"We always like to think about the problems that clients have and how we can provide them with the tools to solve for them," explains Jarvis from his office in New York.

"But rather than try to design a very specific solution to a very specific problem that's the end of the story, we try to think about the individual components that go into solving that problem... so flexibility is at the heart of all of this."

With BQuant regularly updated, clients include some of the largest financial institutions in the world. Among the most recent institutions to have adopted the service is Mitsubishi UFJ Asset Management, which has deployed BQuant Enterprise as part of its digital transformation.

"As we strive to realise Japan as a nation of asset management, enhancing our operational capabilities is an urgent task," said Akira Takanabe, Chief Investment Officer of Mitsubishi UFJ Asset Management. "BQuant Enterprise allows us to drive innovation faster and more efficiently than building these systems ourselves."



James Jarvis, Bloomberg BQuant Desktop Product Manager

Jarvis, a former foreign exchange trader who is well aware of the programming needs of both buy- and sell-side professionals, explains that BQuant's flexibility is chiefly the result of being built on Python. The "go-to tool of choice for people working with large volumes of data" makes BQuant at once easy to adapt to any application and quick to learn.

Python's power resides in its elegant simplicity.

"It is popular, in part, because it is an easy language to learn – people that know how to code Python are up and running instantly," he says.

That offers another of BQuant's advantages – it can facilitate rapid speeds-to-market that mean clients can begin realising value from their creations within hours instead of days, as would be likely with less automated platforms.

Notebooks and Templates

Further helping BQuant users is access to pre-built example notebooks and templates as well as integration with an array of Bloomberg's financial tools, including its order and execution management platforms.

The platform also provides a productivity boost by presenting users with clean, ticker-aligned multi-asset data.

BQuant's collaborative capabilities are another strong point that Jarvis is keen to stress, explaining that BQuant users can share their ideas with other users as BQuant Applications in Launchpad, Bloomberg's customisable workspace.

"It allows teams to collaborate and share interactive insights with people that may not even know that they're working on something that was built using Python," he explains. "To them, it just renders as though it's another part of Bloomberg, even though it's being built in-house by their team."

RegPass

Winner: Best AI Solution for Regulatory Horizon Scanning

RegPass™ is the intelligent compliance advisor built for financial services and developed by Braithwate. Winner of A Team Group's 2025 AI in Capital Markets Award for Best AI Solution for Regulatory Horizon Scanning, RegPass™ gives firms end to end traceability – from first alert to audit assurance.

RegPass™ curates global regulatory updates in a living knowledge graph, then uses AI to filter what's relevant to your entities, products and regions. Alerts link directly to underlying rules, mapped policies/controls, and the evidence that proves adherence. Automated redlining shows what changed and why it matters; reviewers see rationale and confidence, approve with a click, and each decision is recorded.

The built in Policy Advisor answers natural language questions with fully cited research notes and suggested actions. AI assisted mapping accelerates impact analysis and control updates, while hierarchical control libraries let you reuse proven patterns across desks and jurisdictions. Versioned records, diffs and exports make audits faster.

Clients use RegPass™ to cut alert triage by 60–80%, reduce policy/control mapping effort by 50–70%, and shorten audit preparation by 40–60%. Integrations connect to your GRC and ticketing systems without disrupting systems of record.

With RegPass™, compliance teams act faster, keep humans in control, and can prove every step – from alert to audit with confidence.



James Nicholls, Founder & MD & Adrian Collingwood-Ellis, Head of Product

About RegPass



RegPass™ is a Braithwate venture built by financial services experts who've spent decades advising global institutions on regulatory change. We launched RegPass to fill a market gap: an AI powered platform that elevates the signal over the noise, showing firms what matters and turning change into action. Awarded A Team Group's 2025 Best AI Solution for Regulatory Horizon Scanning, we deliver alert to audit traceability with human oversight, security, and open integrations for teams worldwide.

www.regpass.ai



www.a-teaminsight.com



Intelligent Compliance Agent

WINNER

Best AI Solution for Regulatory Horizon Scanning

A-Team AI in Capital Markets Awards 2025

Built by experts. Accelerated by AI.

What RegPass delivers:

- **Relevant alerts only:** AI filters by your business, products, and regions, then maps new rules to your policies and controls.
- **Comprehensive rules library:** your single source of truth for applicable rules, enriched with summaries, obligations and related documents.
- **AI Policy Advisor:** ask in plain English; get fully cited research notes and suggested actions.
- **Instant change insight:** automated redlining shows what changed and what it means for your business.
- **Human in control, 10x faster:** AI does the heavy lifting and provides clear rationale; humans review and approve.
- **End-to-end traceability:** from regulatory alert to rule, to policy and control, to evidence and audit assurance.

Results clients report:

- **60–80%** faster horizon scanning alert triage
- **50–70%** less control mapping effort
- **40–60%** faster audit preparation



Experience RegPass live at our booth.

Thursday, November 20, 2025

Can't attend?

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RegPass

RegPass™ Wins Best AI Solution for Regulatory Horizon Scanning

RegPass has won the award for Best AI Solution for Regulatory Horizon Scanning in the inaugural AI in Capital Markets Awards 2025. These awards recognise established providers and innovative newcomers offering AI powered solutions, services and consultancy to capital markets participants globally. We spoke with James Nicholls, Managing Director, RegPass about the company's success.

Congratulations on winning the A-Team Group AI in Capital Markets Award for Best AI Solution for Regulatory Horizon Scanning. What does this recognition for your proactive compliance technology mean to the team at RegPass?

JN: It validates that our focus on real-world rule applicability, paired with human-in-the-loop oversight, is the right way to bring AI into compliance.

The A Team community votes make it especially meaningful: clients, peers, and practitioners are telling us RegPass™ is solving a real problem – turning regulatory change into precise and controlled action.

It also recognises the depth of domain expertise behind RegPass, developed by Braithwaite, and motivates us to keep raising the bar on explainability, quality, and trust.

Could you provide an overview of your award-winning solution? How does it leverage AI to help capital markets firms move beyond reactive compliance and proactively identify, interpret, and prepare for future regulatory changes on a global scale?

JN: RegPass™ is an intelligent compliance advisor that manages the full regulatory lifecycle from alert to audit. We aggregate global regulatory updates, assess applicability to the nuance of each firm's footprint, and translate change into clear actions mapped to policies and controls.

AI speeds the work – suggested mappings, automated red-lining, and a fully cited Policy Advisor – while compliance officers stay in charge with

detailed explanations of each AI action and end-to-end traceability. The result is efficient, consistent compliance across desks, products, and regions.

Regulatory horizon scanning involves processing a vast and continuous stream of information from countless sources. Could you elaborate on the AI technology that powers your solution? For instance, what role do Natural Language Processing (NLP) or Generative AI play in scanning, filtering, and summarising potential regulations from diverse global sources?

JN: Our pipeline combines NLP and Generative AI with guardrails:

- Intelligent spiders use agentic AI to identify, ingest and normalise global sources.
- NLP classifiers tag topic, jurisdiction, entity type, and regulatory lifecycle.
- Applicability models match alerts to a firm's profile (jurisdiction, products, client types, business units) and produce risk/materiality scores.
- Generative AI summarises and drafts research notes with citations and explains why each item matters.
- Automated redlining uses NLP and Gen AI to highlight changes against prior versions.
- All AI outputs are suggestions. Human approval is required before publishing; lineage, reviewer overrides, and timestamps are captured for model governance and audit trail.

A major challenge for global firms is cutting through the noise to find relevant regulatory intelligence. How does your solution help a compliance team at a multi-jurisdictional bank or asset manager to personalise this process and focus only on the upcoming changes that will directly impact their specific business lines and regions?

JN: We personalise horizon scanning to each organisation:



James Nicholls, Managing Director

- Entity aware profiles: jurisdiction, booking model, products, client segments, and legal entities.
- AI-enhanced applicability filters and thresholds reduce over 75% of the daily noise; only material items are routed to the relevant compliance officer.
- Role based views by business line and region; duplicates and related items are clustered.

RegPass™ content is richly interconnected, with one-click from alert to the affected rules, policies, and controls, so teams know exactly what to do next.

Can you share some insights into the direct impact this solution has on your clients? What tangible benefits are they reporting in terms of reducing the risk of non-compliance, improving strategic planning, or increasing the efficiency of their compliance and legal teams?

JN: Clients report:

- Millions in annualised savings on external counsel
- 60–80% faster alert triage and earlier engagement on consultations.
- 50–70% less effort to map obligations to policies and controls using AI suggested mappings and AI tips on how to improve control effectiveness.
- 40–60% faster audit prep thanks to the clear audit trail of decisions and the end-to-end traceability from rule to control.
- Better regulatory readiness and fewer last minute remediation sprints, improving strategic planning for product launches and market entry.

Looking ahead 12-18 months, what are the most significant regulatory themes you see emerging on the horizon? How is your solution's AI being trained and adapted to effectively scan for and analyse these new, complex areas of regulation?

JN: How we keep the RegPass™ AI sharp: we don't train LLMs; instead, we embed decades of Braithwaite's domain expertise in a living regulatory knowledge graph.

As new regulations land and markets evolve, our SMEs work hand in hand with AI to curate and enrich that graph so that it reflects the latest nuances. The AI models then leverage this graph for retrieval, summarisation, applicability scoring, and automated redlining. Updates hit the knowledge graph, not the models, which gives clients instant, explainable improvements without model risk headaches.

What we see on the horizon: politically, many markets are in a deregulatory or "recalibration" phase. That creates opportunity for firms that can cut through the noise and quickly understand what the newly arranged rules mean for their business.

Key patterns we're tracking:

- Reporting simplification and consolidation: pruning duplicative reports, higher thresholds, and more proportional regimes.
- Market structure updates: transparency and best ex rules being streamlined while preserving core investor protections.
- Digital assets rationalisation: clearer licensing, custody, and market abuse guardrails that enable responsible participation.
- Operational resilience "right sizing": harmonising incident reporting and third party risk expectations across frameworks.
- ESG recalibration: sharper anti greenwashing standards and materiality focused disclosures over volume driven reporting.
- AI governance moving to practical, risk based expectations that encourage innovation with accountability.

This is where RegPass™ excels: our applicability first engine personalises this landscape to your entities, products, and regions – reducing noise, highlighting only what matters, and showing exactly how proposed changes map to your rules, policies and controls. In a world shifting from “more rules” to “smarter rules,” that clarity becomes a competitive advantage.

How does this award-winning AI solution for regulatory horizon scanning fit into the broader vision for RegPass? What is your strategic outlook on the future of AI-driven RegTech and your company's role within it?

JN: Horizon scanning is the front door to our end to end platform. RegPass™ carries change through impact analysis, policy/control updates, attestations, evidence, and reporting – every step traceable from first alert to final assurance.

Strategically, we're building the intelligent compliance layer for financial institutions: AI that makes teams 10x faster while keeping humans in control, open by design (the platform is API-first), and governed for auditability.

As AI driven RegTech matures, we see RegPass™ setting the standard for explainable, applicability focused automation that lets firms move from reactive compliance to confident, proactive execution.

Symphony

Winner: Best AI Solution for Trader Workflow Management

Symphony is a communication and markets technology company powered by interconnected platforms: messaging, voice, directory and analytics.

Our modular technology - built for global finance - enables over 1,300 institutions to prioritize data security, navigate complex regulatory compliance and optimize business interactions.

Symphony Analytics is our AI-powered markets and communication intelligence platform. Powered by its proprietary intelligence engine, Symphony Analytics is the insights platform for global finance. Leveraging secure, flexible AI models plus data from customers, third parties, and Symphony's communication platforms, it provides bespoke insights that powers business workflows and compliance intelligence while keeping customers in control of their confidential company data.

Enhance your enterprise AI strategy by leveraging the safety and security of Symphony's robust communication infrastructure and drive workflow efficiency in the era of agentic AI.



Brad Levy, Chief Executive Office

About Symphony



Symphony is a communication and markets technology company powered by interconnected platforms: messaging, voice, directory and analytics. Our modular technology – built for global finance – enables over 1,300 institutions to ensure data security, navigate complex regulatory compliance and optimize business interactions.

symphony.com



Symphony

Symphony Secures Prestigious A-Team Award for AI Innovation in Trader Workflow

Symphony, the markets infrastructure and technology platform, has been awarded 'Best AI-Enabled App for Trader Workflow Management' at the 2025 AI in Capital Markets Awards. This accolade recognises Symphony's innovative application of artificial intelligence to streamline and enhance the complex daily workflows of traders.

The AI in Capital Markets Awards celebrate the pioneering advancements and significant contributions of AI-driven technology within the financial markets sector. Symphony's win underscores its commitment to empowering financial professionals with cutting-edge tools that drive efficiency, reduce operational risk, and unlock new opportunities.

In an exclusive interview with TradingTech Insight, Michael Lynch, Chief Operating Officer at Symphony, discusses the significance of this award and the transformative impact of the company's AI solutions.

TTI: Congratulations on Symphony winning the award for Best AI Solution for Trader Workflow Management at our AI in Capital Markets Awards! What does this specific recognition mean to the team and for Symphony's position as an innovator in the industry?

ML: Thank you. Awards like this are always incredibly important. They are recognition of the hard work and focus of the Symphony team. That, coupled with the even more important customer recognition and feedback that we're helping them solve real problems, is a real validation.

Symphony, since its founding, has always had an open API at its core; we've always stood for this. I think this award recognises the evolution we've been through over the last couple of years, turning that open API and platform philosophy into solutions that can extend into how our customers are using AI to transform the market.

TTI: Could you give us an overview of the award-winning solution? How does it specifically leverage AI to transform a trader's daily workflow,

moving beyond simple communication to create actionable intelligence from unstructured data?

ML: Here at Symphony, we have a multi-pronged approach to AI with a number of streams. Two of those streams are the most relevant when we talk about trader workflow. The first is what we're doing around our platform and transforming it into an AI enabler. As you know, Symphony, the messaging platform, has always supported inter-firm communication with inbuilt controls around data loss, protection, info barriers, et cetera. What we're now building into that are more and more tools for users to use those same controls to deploy their agents on that platform. If you think about an agent as a type of user, you can now apply the same controls that you would to a human conversation to an agentic conversation. That has really empowered customers and partners to have a trusted environment in which they can expose those agents to their employees and, excitingly, to their counterparties.

The other key part of our strategy that is very relevant in the trader space is what we're doing with trader voice analytics. This is where, given our Cloud9 product and our ability to deliver a modern approach to trader voice, we can now add the ability to understand the incredibly complex conversations that happen over our product all day, every day. We can turn those into structured insights that can then be fed into a CRM, a trading system, or a compliance system, and really help our customers make better, faster decisions, not just for themselves, but across the whole desk. It harnesses the intelligence of opportunity across a desk by turning voice data into a usable data set.

TTI: Trader workflows are often fragmented, involving multiple systems and a high volume of communications. What are the key pain points—such as information overload, operational risk, or missed opportunities—that your AI solution is designed to solve for traders and their firms?



Michael Lynch, Chief Operating Officer at Symphony

ML: The challenge of fragmented, disconnected systems is very real. A lot of the opportunity identification and data synthesis today happens in the trader's brain. The system does some of it, and increasingly more, but there's still a lot that depends on a human making a connection across multiple disparate systems and data sets.

Where we are focused with our agent strategy, and where we're seeing more of our customers leverage AI, is taking the intelligence that is somewhere in a system that they can't find or don't know how to access, and exposing that in the right place, at the right time, based on the right prompt. As you think about a move towards autonomous agents, and what you can do in terms of surfacing opportunities or risk situations to a trader, being able to understand that system A has data that connects to system B and being able to expose that to the trader in a way that is understandable and actionable, is a transformative opportunity. A lot of this comes down to desktop real estate and not having enough space on your eighth screen! So, being able to deliver that in a messaging window that you're already using for other use cases is incredibly powerful.

TTI: Trust and control are paramount when AI is used to interpret trade-related communications. Could you elaborate on the technology underpinning your solution and the measures you have in place to ensure the security and compliance of the data used and the workflows it automates?

ML: Absolutely. Symphony, having grown up in the financial markets, is secure and compliant by design. Whether that's end-to-end encryption, where our customers own their own encryption keys, our info barriers that help enforce internal regulatory walls, data loss prevention, or malware control, all of these tools have been historically applied to human and bot interaction. We have applied those to agentic flows, which means that our

customers can apply the same sort of rules to their agents that they have for human conversation, or apply specific rules that are more or less restrictive based on the use case.

To highlight this specifically, there's a lot of talk around the difference between a bot and an agent. The key word for me is autonomy. An agent has to have a level of autonomy that a bot today doesn't. I ask a bot a question, it gives me the answer. An agent takes that a couple of levels further in terms of solving problems for their human or doing flows that have no human involvement. The challenge here is that in a world where we have regulatory controls, autonomy is a scary word. So what we provide allows our customers to deliver autonomy, but with the guardrails that come with the type of security and compliance controls that we have. You have autonomy within that box. As the technology becomes more sophisticated and as our customers become more confident, that box can expand, contract, or change shape, but you can still experiment and really deliver autonomy. Let's call it what it is: controlled autonomy. It will evolve and become more autonomous, but that's the value proposition that we deliver.

TTI: Can you share some insights into the direct impact this solution has on your clients? What tangible benefits are trading desks experiencing in terms of efficiency gains, reduced operational risk, improved compliance, or even enhanced trading performance?

ML: The number one benefit that we're already seeing from our customers that have deployed agents with us is the incredible time they are saving by getting the intelligence and information they need faster. Being able to interrogate an agent within a Symphony window to locate a data set or answer a question, for which today they are going into a data system or trading system and doing multiple clicks and queries to find that specific piece of information, is saving

a significant amount of time in their trading day. That's the feedback we're getting.

This is very much about finding ways to make those kinds of queries for difficult-to-find information - which is often in legacy systems that probably aren't winning any UI awards anytime soon - much faster. It helps their traders move quickly when the markets are moving quickly. So that's what we are hearing already in terms of the benefits that our customers are seeing.

TTI: Looking ahead 12-18 months, what do you see as the next major evolution for AI in trader collaboration and workflow management? How is Symphony planning to enhance its offerings to meet those future demands and further evolve the "intelligent desktop"?

ML: I often think about the hype cycle: the initial peak of elevated expectations, and then the trough where it's like, "Oh man, none of this worked. I thought this was all going to be faster." Then you move into the steady state of incremental progress towards the real end point, which was never as high as you were hoping at the beginning, but it's significant.

To me, we are just on that upward slope. I think the trough was probably 2024, where everyone was doing POCs and realised this is much harder than they thought. Everyone had 20 POCs, and now I think most firms have found the three to five that are saying, "Hey, this is going to deliver real value." We're now on a path of rapid, incremental innovation toward what those can do to not just make a great demo, but actually deliver tangible, financial benefits to our customers, whether that's time saved or money made. I think that's where we are in the market.

And that's exciting to me, because a lot of this is now around really listening to customers and fine-tuning the product set that you have out there. You have the base, and you need to make sure you're really solving for that exact right use case that is transformative for your customers. I think that's going to be the next year or so. Obviously, the broader AI space is going to continue to evolve by leaps and bounds with each new evolution. And all of us as technology providers servicing this market will evolve and capture those and deliver them to our customers.

TTI: Thank you, Michael.

Finastra

Winner: Best AI-Enabled App for Capital Markets

Summit is a leading capital markets solution, offering comprehensive front-to-back capabilities for treasury and trading operations. Designed to accelerate straight-through processing, reduce time to market, and lower operational costs, Summit supports business growth with a modular, multi-tier architecture that ensures flexible deployment, high availability, and seamless integration with leading market data providers such as Bloomberg and Refinitiv.

Summit delivers robust functionality across trading, risk management, and post-trade processing. Its cloud-enabled infrastructure supports real-time data access and decision-making, enabling firms to respond swiftly to market volatility and shifting regulatory landscapes. Out-of-the-box simulation and migration tools facilitate smooth upgrades, while ensuring compliance and business continuity. By enhancing agility and operational resilience, Summit helps institutions stay competitive in a rapidly evolving financial ecosystem.

Recent innovations in AI-driven pre-settlement matching and performance optimization help reduce trade breaks, accelerate reconciliation, and enhance efficiency. These award-winning back-office enhancements allow financial institutions to streamline operations and focus on strategic growth.

Through Finastra's managed services and partner ecosystem, clients benefit from enhanced support, automated testing, and continuous innovation. Summit is trusted by financial institutions including development banks, multilateral agencies, commercial banks and asset servicers, as a reliable foundation for modern capital markets infrastructure.



Elena Nicolescu, Director of Product Management, Treasury & Capital Markets

About Finastra

FINASTRA

Finastra is a global provider of financial services software applications across Lending, Payments, Treasury and Capital Markets, and Universal (retail and digital) Banking. Committed to unlocking the potential of people, businesses and communities everywhere, its vision is to accelerate the future of Open Finance through technology and collaboration, and its pioneering approach is why it is trusted by ~8,100 financial institutions, including 45 of the world's top 50 banks.

finastra.com



Finastra

Finastra's Summit Crowned Best AI-Enabled App at Inaugural AI in Capital Markets Awards

Finastra has secured the award for "Best AI-Enabled App for Capital Markets" for its Summit solution at the first-ever AI in Capital Markets Awards, hosted by the A-Team Group. This new awards programme recognises the growing importance of artificial intelligence in transforming capital markets by honouring the leading AI-driven solutions that deliver significant value to financial institutions.

Finastra's Summit, a comprehensive solution for OTC derivatives trading, has been recognised for its innovative use of AI to automate and streamline post-trade operations. The AI-powered pre-settlement matching solution within Summit is designed to tackle the complexities of unstructured data, improve accuracy, and reduce operational risk, which is increasingly critical as the industry moves towards compressed settlement cycles like T+1.

To understand more about the award-winning solution and its impact, TradingTech Insight spoke with Elena Nicolescu, Director of Product Management for Summit, Treasury & Capital Markets at Finastra.

TTI: Congratulations on the award. To start, could you give us a high-level overview of the Summit pre-settlement matching solution and the specific post-trade challenge it was designed to solve?

EN: Thank you. Summit's AI-powered pre-settlement matching solution automates payment validation by extracting and reconciling trade details from unstructured data. This improves accuracy, speeds up processing, and reduces operational risk.

Fully integrated with Summit, the solution supports next-day settlement readiness, enhances compliance, and delivers measurable efficiency across post-trade operations.

It was designed to solve challenges such as the validation of cash settlements before sending payment orders, to secure payment orders and meet cut-off times, and to handle different file formats in an automated manner.

In fact, the most notable challenge our clients face is managing a myriad of non-standard information flows and processes. To complete their daily settlements, they are often forced to rely on manual steps, such as reconciling emails, screenshots, and spreadsheets with trade data; tasks that cannot be resolved through mapping or automated tools.

Our solution not only provides an engine that can easily interpret data and extract required information, but it seamlessly introduces that data into Summit's STP processing, allowing the client to use a fully automated, end-to-end workflow.

TTI: Your entry highlights an AI-powered workflow as the core innovation. Can you elaborate on how this AI differs from traditional, rule-based systems in handling unstructured data like PDFs and how it continuously learns to improve matching accuracy?

EN: Unlike traditional rule-based systems, Summit's solution uses AI to interpret and structure the external data into Summit readable formats, enabling seamless integration into the STP workflow.

The AI continuously improves matching accuracy by learning from historical data and exception patterns. We also offer customers the flexibility to integrate their own AI engines, as more and more frequently, we see clients adopting AI strategies centred around their proprietary models. In this case, it can incorporate proprietary data to improve matching accuracy.

TTI: With the industry's move to T+1 settlement, how critical is this level of automation for ensuring regulatory readiness and reducing the risk of failed trades under compressed timelines?

EN: This is part of the big picture. As these settlements are part of the T+1 reg readiness deadlines, the technology frees up operations and will lead to increased efficiency in other areas.



Elena Nicolescu, Director of Product Management, Treasury & Capital Markets

That said, automation enables real-time visibility into trade status, allowing firms to forecast cash needs and manage liquidity proactively. It increases the volume of settlement notifications that can be handled, as manual processes simply cannot scale to meet this speed, especially across time zones.

This impacts risk reduction, minimising trade failures due to mismatches or late instructions. It is also important for regulatory compliance, as it helps institutions align with SDR, SEC, and other global mandates. The solution handles high volumes without manual intervention, supporting operational scalability. All of these improvements increase competitive advantage, enabling faster settlement, freeing up capital and improving client service.

TTI: The solution is described as “client-proven.” Could you share any anonymised metrics that demonstrate the measurable gains in straight-through processing (STP) rates and operational efficiency that clients have achieved since implementation?

EN: We’ve developed this module in close collaboration with some of our largest clients, including institutions that process millions of trades weekly. This has allowed us to rigorously test the solution across a wide range of use cases and operational environments.

While we do not have public client metrics available today, we can share that one of our clients – a major global custodian bank – currently manages over 58 million trades in their database and processes approximately 500,000 to 600,000 trades daily through this workflow. The scale and complexity of their operations have helped validate the robustness and scalability of the module.

The solution has been deployed in high-volume environments where manual reconciliation was previously a bottleneck. By automating exception handling and improving matching

accuracy through AI trained on historical data and exception patterns, clients have reported significant improvements in operational efficiency and straight-through processing (STP) – even if these gains are not yet publicly quantified.

Our internal testing has shown that the pre-settlement matching workflow significantly speeds up processing and improves accuracy as well. We have seen massive error reduction, as the automated matching process minimises errors, reducing discrepancies by over 90%.

In addition, there are demonstrable gains in processing speeds. Real-time matching capabilities ensure that 95% of settlement flows are processed within seconds of receipt.

TTI: Your entry notes a “cloud-ready architecture.” What benefits does this provide to clients in terms of deployment speed, scalability, and integration with their existing infrastructure via RESTful APIs?

EN: The solution is cloud-ready. Built on a containerised, scalable infrastructure with RESTful APIs, the solution supports rapid deployment and high availability, making it easy to integrate with clients’ existing systems and workflows.

Because it is fully embedded within Summit’s post-trade processing engine, including Swift messaging, netting, and accounting workflows, it also drives efficiency across post-trade operations.

Beyond deployment and integration, a cloud-ready solution opens the door to broader synergies. Many clients are building centralised cloud infrastructures that house all their operational data, including Summit data. When paired with an AI engine trained on this unified dataset, they unlock powerful new capabilities for insight generation, predictive analytics, and operational optimisation. This

positions them at the forefront of innovation, with a data strategy that is both scalable and future-proof.

TTI: The solution is fully embedded within Summit's post-trade ecosystem. What are the advantages of this integrated approach compared to using a standalone, third-party AI application?

EN: There isn't any need for additional development to integrate the solution.

The Summit Pre-Settlement Matching blotter displays both internal and external settlement flows - out-of-the-box, highlighting pending and matched items. This provides transparency, and a clear view of the settlement status.

TTI: Looking ahead, what is the future roadmap for this AI-enabled capability? Are you planning to expand its scope or introduce new machine-learning-driven features?

EN: Summit will remain a strategic platform for banks' digital transformation and operational excellence by proactively adapting to market changes, regulatory developments, and client needs.

The team will continue to deliver timely, standards-aligned solutions through close customer collaboration and by leveraging flexible As-a-Service models for rapid, non-disruptive deployment.

Our key focus areas for Summit enhancements centre on workflow optimisation, scalability, and advanced analytics. The platform is being enhanced to support real-time processing and automation through APIs, AI, and service extensions, while consolidating asset classes and post-trade processes for unified back-office control.

Improvements in parallel processing and system performance aim to reduce total cost of ownership and boost operational efficiency. Additionally, Summit is expanding its risk analytics capabilities with new data extraction tools, integration layers, and a modernised data aggregation framework to deliver a more powerful and intuitive user experience.

Our ultimate and continuing goal is to develop Summit as the Cloud platform of choice for banks' digital transformation and operational excellence.

S&P Global Market Intelligence

Winner: Best AI Solution for Research Summarisation

Our Single Platform for Essential Market Intelligence.

S&P Capital IQ Pro is an integrated market intelligence platform that enables you to uncover opportunities, address market challenges head-on, and accelerate your decision-making with comprehensive data, powerful visualizations, and advanced AI-based analytical tools.

It is S&P Global Market Intelligence's flagship data and analytics platform, offering access to deep, meaningful data on global financial markets, companies, and industries to help you make informed decisions. The platform provides proprietary research and in-depth analysis from thought leaders and industry experts, transforming more than 135 billion raw data points each year into actionable intelligence.

S&P Capital IQ Pro empowers smarter decisions with access to 109,000+ public companies, including 49,000 active with current financials, and a database of 58M+ private companies, including 1.3M+ early-stage firms. Gain insights from 140+ Capital IQ Estimates metrics covering 19,800+ active companies across 110+ countries. Integration with Visible Alpha Estimates adds 200M+ data points and over 1M consensus line items from 200+ brokers.

Access Fixed Income data on 19.4M+ securities, 115,000+ loan facilities, and discover Ownership data on 49,000+ public companies and 336,000+ insiders. Stay ahead with Transactions data on 1.2M+ M&As, 340,000 equity offerings, and 870,000+ funding rounds, plus comprehensive Macroeconomic and Country Risk data for 200+ countries and territories.

www.spglobal.com/capital-iq-pro



Daniel Kim, Senior Director, Head of Digital Engagement, Data & Research

About S&P Global Market Intelligence

S&P Global
Market Intelligence

www.spglobal.com/market-intelligence/en



www.a-teaminsight.com

At S&P Global Market Intelligence, we provide accurate, deep, and insightful information. Our experts deliver unparalleled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction. As a division of S&P Global (NYSE: SPGI), we are the world's foremost provider of credit ratings, benchmarks, analytics, and workflow solutions in the global capital, commodity, and automotive markets.

S&P Global Market Intelligence

S&P Global Market Intelligence Wins A-Team Group's AI In Capital Markets Best AI Solution for Research Summarisation Award

S&P Global Market Intelligence's flagship data and analytics platform has won A-Team Group's AI in Capital Markets Award for Best AI Solution for Research Summarisation.

Data Management Insight spoke to Daniel Kim, senior director, head of digital engagement, data and research at S&P Global Market Intelligence and discusses the AI capabilities of its S&P Capital IQ Pro platform.

Data Management Insight (DMI): Congratulations on S&P Global Market Intelligence winning A-Team Group's AI in Capital Markets Award for Best AI Solution for Research Summarisation. What does this specific recognition for summarising complex research mean to your team and the business?

Daniel Kim (DK): Winning this award is a testament to the hard work and innovation that goes into S&P Capital IQ Pro. S&P Global Market Intelligence's flagship data and analytics platform. This recognition reflects our dedication to leveraging cutting-edge technology to meet the evolving needs of our clients. The AI capabilities across the platform, particularly in Document Intelligence, empower clients to navigate the complexities of financial data and documents more efficiently, helping them save time and focus on making informed decisions.

DMI: Could you give us an overview of your award-winning solution? What are its key features, and how does it leverage AI technologies like Generative AI or advanced NLP to distill vast amounts of research into concise, actionable summaries for capital markets professionals?

DK: S&P Capital IQ Pro is designed to tackle the challenges of filtering vast amounts of unstructured data into concise, actionable and contextual insights. At the heart of this solution are several key AI capabilities integrated into the platform:

- S&P Capital IQ's Pro GenAI-powered document workflow tool enables users to analyse global company filings, transcripts, news and broker

research. They can benefit from smart search capabilities across documents, leverage transcript summarisation for detailed summaries of earnings calls organised by topic and sentiment, surface key phrases highlighting relevant and significant topics within transcripts, and access natural language processing (NLP)-derived sentiment scores to better understand how a company's narrative is perceived by investors.

- As our Generative AI assistant tool, when used within Document Intelligence, users can query documents using natural language like they would be asking a question to a person and retrieve insights such as financial highlights, strategic initiatives, growth drivers, operational opportunities or challenges that were discussed on an earnings call and more. With the ability to query multiple documents, users save significant time when doing so, as they can query across multiple sources to find insights on a single company, peer list, and industries.
- It enhances our clients' understanding of stock price movements. The capability summarises key events influencing market activity, saving our clients time when analysing price fluctuations during a specific timeline.

DMI: The problem of information overload is a major challenge for analysts, portfolio managers and investment bankers. How does your solution directly address this pain point and how does it help clients cut through the noise to find the most critical insights faster?

DK: Document Intelligence helps anyone doing research pinpoint the relevant information from the large corpus of textual data from filings, transcripts, investor presentations, news and broker research. Features such as Transcripts Summaries and Key Phrases automatically summarise key insights and highlight the most



Daniel Kim, Senior Director, Head of Digital Engagement, Data & Research

relevant key points and trends from earnings calls. Analysts, portfolio managers and investment bankers can quickly grasp the essential information without sifting through pages of content, allowing them to focus on what truly matters for their decision-making processes.

Additionally, ChatIQ in Document Intelligence enhances the research workflow by providing a conversational interface for users to ask questions within one or more documents. Instead of reading through lengthy text, clients can simply type in their queries and receive instant, contextual responses. This not only saves time but also ensures that users can access the insights they need in a straightforward manner, cutting through the noise of irrelevant data.

Finally, Chart Explainer digs through the text in news articles and events to provide key company news or events that could have impacted the stock price within the selected time frame. This saves users time when analysing market activity and stock movements for a specific company.

Together, these tools within S&P Capital IQ Pro empower our clients to navigate the complexities of financial information and unstructured data with ease by providing the ability to quickly find critical insights that inform their strategies, all while reducing the cognitive load associated with information overload.

DMI: Trust and accuracy are paramount when using AI for summarisation, especially in finance where decisions are critical. Could you elaborate on the technology underpinning your solution and the measures you have in place to ensure the reliability, accuracy and factual integrity of the summaries it generates?

DK: Trust and accuracy of our data are critical to our clients. S&P Capital IQ Pro is not only built on the highest-quality corporate, market and financial information available but it also provides the ability to audit financials and forecasts to the source

document as well as view the detailed calculations. We've brought this same capability to our AI-generated content to ensure clients can verify accuracy and easily navigate back to the source document.

In Earnings Call Transcript Summaries and ChatIQ, users can audit any part of the AI-generated content by tracing back any point included in the summary or answer to the source text to easily access and verify the information. Additionally, in Chart Explainer, each summary includes links to the underlying news articles that influenced the summary.

DMI: Can you share some insights into how your clients are using this solution in their daily workflows? What tangible benefits are they experiencing—for example, in terms of time saved, improved decision-making, or enhanced research capabilities?

DK: There are many examples and here are just a few:

- Clients are using Document Intelligence to quickly find documents they need to access and extract insights. With Earnings Call Transcript Summaries, our users are reading through short summaries that save them time by digesting large amounts of text into concise insights.
- With ChatIQ, clients can ask natural language questions about any filings, transcript, investor presentation and broker research report and receive instant, contextually relevant answers. With the ability to support multiple documents at once, this functionality enhances their research capabilities by providing quick access to insights that would otherwise require extensive searching and cross-referencing.
- Clients are finding Chart Explainer particularly valuable for understanding market movements and trends. By summarising key events and linking to underlying news articles, this tool provides a clear context for the data presented.

Clients appreciate the ability to quickly grasp the reasons behind market fluctuations, which enhances their decision-making process.

DMI: Looking ahead 12-18 months, what do you see as the next major evolution for AI in investment research? How is S&P Global Market Intelligence planning to enhance this solution or develop new capabilities to meet those future trends?

DK: The next major evolution of AI in financial and market research will be the move from retrieving information and creating summaries to generating actionable insights and deliverables. Analysts will expect to interact with their platforms conversationally, using natural language to build charts, screens and presentation-ready materials. This shift reflects a growing need for faster turnaround, personalisation and automation in workflows that have historically been manual and resource-intensive.

Our vision for S&P Capital IQ Pro to meet this demand is to enhance it in ways that will enable the various capabilities to come together to become our clients' virtual analyst. By working to embed ChatIQ across the platform and enable natural language-driven functionality, users would be able to generate charts and screens by describing what they need. The roadmap extends this capability to building pitch decks and presentations directly from the data—transforming raw metrics into polished outputs with minimal effort. This allows users to spend less time on formatting and data assembly, and more time on strategic interpretation and client engagement.

DMI: How does this award-winning AI solution for research summarisation fit into S&P Global Market Intelligence's broader strategy for integrating AI across your suite of data, analytics and workflow solutions for the global capital markets?

DK: S&P Capital IQ Pro exemplifies S&P Global Market Intelligence's approach to AI: combining high-quality data with trusted analytics and user-focused design based on workflows serves as both a showcase and a proving ground for how AI can transform the way users discover, analyse and act on data. By embedding capabilities such as ChatIQ, natural language charting and screening, and the ability to generate client-ready outputs like pitch decks, Pro demonstrates the shift from static data tools to dynamic, AI-driven solutions that execute tasks across workflows that help our users save time in finding the insights and analyses they need.

Winner: Editor's Recognition Award for AI Professional of the Year

Iro Tasitsiomi

PhD, Head of AI & Investments Data Science, T.Rowe Price

Iro Tasitsiomi is a global leader in quantitative finance, data science, and AI, with senior leadership roles at Fortune 500 firms spanning the sell- and buy-sides and both systematic and discretionary investment approaches. She is a well-published thought leader and frequent keynote speaker. She earned a Ph.D. in Astrophysics from the University of Chicago and taught at Princeton University before transitioning to finance.



Winner: Best Agentic AI Platform for Capital Markets

Acuity Knowledge Partners

Acuity Knowledge Partners is a leading global provider of bespoke research, data management, analytics and AI solutions to the financial services sector, including asset managers, corporate and investment banks, private equity and venture capital firms, hedge funds and consulting firms. Its global network of over 7,000 analysts and industry experts, combined with proprietary technology, supports more than 800 financial institutions and consulting companies to operate more efficiently, unlock their human capital and transform operations.

www.acuitykp.com



Winner: Most innovative use of AI in an enterprise data management initiative

Alkymi

Alkymi is the leading AI-powered data workflow platform for financial services, unlocking 100% of the investment and client data trapped in unstructured documents. Alkymi transforms this data into standardized, interactive datasets that integrate seamlessly with clients' core business processes. The platform empowers institutional investors, wealth managers, asset owners, and asset servicing firms such as Northwestern Mutual, PGGM, Strategic Investment Group, and SimCorp to scale their investments, serve more clients, and respond faster to changing market conditions.

www.alkymi.io



Harald Collet, CEO

ALKYMI

Winner: Best AI-Based Solution for Data Quality

Confluence

Confluence Technologies, Inc. is a global leader in enterprise data and software for compliance, regulatory, analytics, and investor communications. For over 30 years, we've empowered asset managers, fund administrators, asset owners, and consultants with fast, efficient reporting and insights. Headquartered in Pittsburgh, PA, our 700+ employees across five continents serve 1,000+ clients in 40+ countries. With expert teams and innovative tools, Confluence delivers speed, accuracy, and forward-looking solutions.

[Confluence.com](https://confluence.com)



Winner: Best AI Consultancy for Capital Markets

Element22

Element22 is a boutique data and AI consulting firm that helps financial institutions modernize data capabilities, harness AI, and meet regulatory requirements. Combining deep industry expertise with proprietary platforms, including Pellustro, Benzaiten, and ESGi, Element22 delivers solutions across data strategy, governance, technology architecture, AI, and sustainability reporting. As an EDM Council Diamond Certified Partner, Element22 empowers clients to transform data into trusted, actionable intelligence that drives business value.

www.element-22.com



(Left) Nata Berishvili - Data Scientist
(Right) Maryana Lazaridi - Director Information Security

element₂₂

Winner: Best AI Solution for Regulatory Intelligence

Muinmos

Muinmos redefines client onboarding, lifecycle management, and compliance through advanced AI-driven regulatory intelligence. Its proprietary platform analyses and interprets complex KYC, KYB, AML, and suitability and appropriateness assessments to deliver instant, explainable compliance and client classification across global jurisdictions. Combining deep legal, regulatory, and technological expertise, Muinmos empowers institutions to make faster, smarter, and fully compliant decisions transforming regulatory complexity into intelligent action, trusted by banks, investment firms, and crypto asset providers worldwide.

www.muinmos.com



Remonda Kirketerp-Møller, Muinmos' CEO

muinmos

Winner: Most innovative AI in Regulatory Compliance Initiative

n-Tier

n-Tier is an innovative financial technology company that couples deep industry expertise with a unique software platform to help institutions minimize the risks and costs associated with regulatory reporting. The Compliance Workbench is the only platform that has proven to programmatically unwind the complexity of trade flows across all front- and back-office environments globally to produce accurate regulatory reports while providing the independent monitoring and controls needed to manage critical reporting obligations.

www.ntierfs.com



Winner: Best AI Solution for Credit Risk Analysis

Oxane Partners

Oxane Partners, founded in 2014, is a leading Oxane Partners is a leading provider of technology solutions to the 'Private Credit+' industry. The firm helps global investment firms and banks transform the way the credit investments are managed and analysed. With 650+ professionals across London, New York, Gurgaon, and Hyderabad, Oxane's platform manages over \$800 billion in notional value for 100+ clients, including banks, private credit firms, hedge funds, and asset managers across 22+ global markets.

www.oxanepartners.com



Mritunjay Sinha, Director, Head of Product,
Oxane Partners



More AI in Capital Markets Awards 2025 winners

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Nasdaq

Best AI-Based Solution for Data Management

Opensee

Most Innovative AI in Trading Initiative

3AI

Best AI Solution for Client Communications

AiMi

Best AI Solution for Conduct Risk Management

AP Solution IO

Best AI Solution for Document Management & Data
Extraction

Canoe Intelligence

Best AI Solution for Sanctions Screening

Castellum AI

Best AI-Based Solution for Data Quality

Confluence

Best AI Solution for Compliance Mapping & Policy Management

Corlytics

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Best AI Solution for Transaction Cost Analysis

FactSet

Best AI Start Up for Institutional Markets

HAWK:AI

Best Solution for AI Model Orchestration

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Oxane Partners

Best AI Solution for Privacy

Pegasi AI

Best AI / ML solution for ESG

Physis Investment

Best Vector DB & RAG Solution for AI Deployment

Pinecone

Best AI Solution for Regulatory Reporting

Qomply

Best AI-Enabled Foundation Models for Capital Markets

Sense Street

Best AI Solution for Liquidity Discovery

Tradeweb

Best AI Solution for Trade Surveillance

Trading Technologies

Best AI Solution for Software Development

TurinTech AI

Best AI Solution for Quantitative Analysis & Risk
Management

Vidrio Financial

Best AI-Based Solution for Data Discovery & Classification

ZL Tech

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