

# MSCI Connector

A governed connector that brings MSCI's data, analytics and tools into clients' AI ecosystems through the Model Context Protocol (MCP).



The **Model Context Protocol (MCP)** is an open, industry-standard interface for connecting AI applications to external data, tools and systems. The MSCI Connector implements this standard to give clients governed access to MSCI's data, models and analytics through a single interface. It enables access to MSCI insights from within the AI tools they already use and to bring their own portfolio data to MSCI's calculation engines, while maintaining enterprise-grade security, control and auditability across every interaction.

## The Challenge

Investment teams increasingly operate inside AI-powered environments, yet the way they access and apply data and analytics has not kept pace.

- Manual data search and aggregation
- Data-security concerns
- Slow decision cycles
- Inability for AI to safely access governed investment data
- No standards-based path to bring MSCI analytics into existing AI workflows alongside client portfolio data

Together, these challenges limit the ability to deliver timely, secure and consistent insights and prevent clients from integrating governed analytics into the AI-powered workflows where investment decisions are increasingly made.

## The Solution

MSCI Connector addresses these challenges by enabling AI-driven insights within a governed environment.

- Provides a single-entry point across MSCI datasets and analytics
- Delivers conversational, on-demand insights
- Enables explainable AI with visible reasoning
- Creates workflow efficiencies with presentation ready output
- Meets clients inside the AI tools they already use, with full governance over both MSCI data and client portfolio inputs

## How it works

The MSCI AI Connector enables interaction between AI platforms and MSCI data through a controlled request and delivery flow.

- 1. Connect** — One-time OAuth setup authenticates the user's enterprise AI environment to MSCI.
- 2. Query** — Users submit natural language requests; MCP translates these into structured API calls with schema discovery and query optimization.
- 3. Receive** — Authorized data is returned in presentation-ready format, with visible reasoning and full auditability.

Importantly, MSCI's models and analytics engines perform all data processing, risk calculations and output generation. The LLM acts only as a natural-language interface by translating user questions into structured requests and routing them to the appropriate MSCI tools and workflows. The result is analytical output that's governed and traceable to MSCI's validated methodologies while supporting the capabilities and flexibility that LLM platforms provide.

## Key Capabilities

- **Ask in plain language** — Query MSCI data using natural language; no query language or technical expertise required
- **Works inside your AI environment** — Access MSCI data directly from within your own AI platform, with no separate login or product switch
- **On-the-fly visualization** — Generate charts and dashboards instantly as part of the same conversation
- **Customizable with a follow-up** — Refine, reformat or re-cut any output with a single prompt
- **Branded, presentation-ready outputs** — Responses adapt to client design and branding, ready to share without further formatting
- **Governed data access** — Requests are authenticated and permissioned, ensuring only authorised data is returned
- **Consistent, reproducible results** — The same inputs return the same outputs, supporting auditability and compliance

## Primary Use Cases

- **AI-enabled product features** — Embed generative AI insights into MSCI platforms
- **Cross-platform enablement** — Reuse AI capabilities across multiple products and asset classes
- **IndexAI Insights** — Query index performance, constituents, exposures, corporate actions and methodology rules across 68,000+ MSCI indexes using natural language, with up to 20 years of history, to support benchmarking, research and portfolio construction, natively within any MCP-compatible AI tools your teams already use
- **Total Plan Manager (TPM)** — Query public-private exposure analysis, pacing models and capital planning scenarios across asset classes and geographies using Total Plan Manager directly from within an AI environment
- **Risk and portfolio analytics** — Access portfolio risk analysis, factor exposure interrogation, scenario analysis, attribution narratives and limits monitoring natively within any MCP-compatible AI environment, without requiring custom API development. Clients operating LLM-powered workflows can interrogate their portfolio data through MSCI's governed analytics layer directly using tools such as Claude, Microsoft Copilot or Cursor
- **Real Assets Index Intel** — Query detailed fund and asset performance across global real estate, infrastructure and real estate debt, with 30+ years of history and granular breakdowns by asset type, market and sub-market, to support benchmarking, research and underwriting, all directly from within an AI environment
- **Sustainability and Climate Data** — Retrieve ESG Ratings, Controversies, Business Involvement Screening Research (BISR) and Emissions data directly into supported AI platforms. Initial capabilities include factor and methodology discovery to understand what data is available and how it is calculated, single-company data retrieval to access live data for 10,000 companies, and Python or Java code generation to accelerate integration of APIs into client applications and AI-enabled workflows.

## Value & Differentiation

- **No context switching** — Users stay inside their existing AI workflow; MSCI data comes to them
- **From question to output in seconds** — Eliminates manual data search, aggregation and formatting
- **Outputs clients can actually use** — Dashboards, charts and summaries that match client branding and are ready for presentation
- **Fully in the user's control** — Any output can be adjusted, extended or reformatted with a follow-up prompt
- **Secure by design** — OAuth-authenticated access ensures data is only delivered to authorised users
- **Your data stays yours** — Client portfolio data submitted through MCP is used only to generate results for that client. It is not shared with other clients, retained beyond the session, or used to train or fine-tune any AI model
- **One platform, every dataset** — A single connection spans multiple MSCI products and asset classes, with more being added

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## About MSCI

MSCI (NYSE: MSCI Inc.) strengthens global markets by connecting participants across the financial ecosystem with a common language. Our research-based data, analytics and indexes, supported by advanced technology, set standards for global investors and help our clients understand risks and opportunities so they can make better decisions and unlock innovation. We serve asset managers and owners, private-market sponsors and investors, hedge funds, wealth managers, banks, insurers and corporates.

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