



March 2026

MSCI Connector

Connecting Claude to MSCI data

Two integrated MCP tools:

- MSCI IndexAI Insights™
- MSCI Private Capital Intelligence (PCI)

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Notice and disclaimer

1. What Is the MSCI Connector?

MSCI Connector gives you direct access to MSCI data from within Claude. Using the Model Context Protocol (MCP), Claude connects securely to MSCI's content and retrieves entitlement-controlled information in response to your questions.

Two MCP servers are available, each covering a distinct data domain:

Capability	What You Can Ask
MSCI IndexAI Insights™ ("IndexAI Insights")	Query MSCI index performance, constituents, factor analytics, and methodology documentation
MSCI Private Capital Intel (PCI)	Benchmark private capital funds using IRR, TVPI, DPI, and other performance measures across vintages, geographies, asset classes, and fund sizes

Each tool connects securely to MSCI to access, analyze and interact with MSCI data that matches your existing entitlements. The tools can be used independently or in combination within the same conversation based on your entitlements.

2. What's Available?

2.1 IndexAI Insights

Through conversational interaction, you can ask plain-language questions about index performance, exposures, constituents and methodologies and get insights that are grounded directly in MSCI's proprietary data.

Capability	What You Can Ask
Performance	"Show me year-to-date performance of the MSCI Emerging Markets Index in USD."
Constituents	"What are the top 10 securities by weight in the MSCI World Core Multi-Factor Index?"
Methodology	"What are the differences between MSCI ACWI Quality and MSCI ACWI Momentum?"
Comparison	"Draft a one-page comparison of the MSCI World Index and MSCI USA Index for our quarterly review."
Charting	"Plot performance of MSCI World Core Multi-Factor Index vs MSCI World Index over the last 3 years."

Index Performance: Index levels, returns (price, gross, net), and fundamental ratios (P/E, P/B, dividend yield).

Constituents & Securities: Security-level composition data: constituent weights, country/sector breakdowns, market cap, fundamentals, and valuation ratios.

Proprietary Datasets & Analytics: FaCS factor scores (Value, Momentum, Quality, Size, Volatility, Yield, Growth), plus Sustainability and Climate metrics.

Corporate Actions: Dividends, splits, mergers, spin-offs, and rights issues, including their impact on index additions, deletions, and weight changes.

Index Methodology: Rules governing index construction from public MSCI methodology documents: eligibility criteria, rebalancing, and how derived indexes inherit rules from parent indexes.

2.2 Private Capital Intelligence (PCI) — Fund Benchmarking

PCI provides universe analytics for private capital funds, drawing on the MSCI PCI database. You can filter by geography, asset class, vintage, industry, fund size, and vehicle type.

Capability	What You Can Ask
Performance benchmarks	"Show me median IRR and TVPI for US Buyout funds, vintages 2015–2020."
Asset class comparison	"Compare IRR across Venture Capital, Buyout, and Infrastructure."
Geographic analysis	"What is the pooled IRR for European private equity funds?"
Time series	"How has DPI for US Buyout funds changed over the last 5 years?"
Fund size filter	"Show IRR for large-cap buyout funds over \$5B."

Available measures: IRR (including 1yr, 3yr, 5yr, 10yr, 15yr, 20yr periods), TVPI, DPI, RVPI, Distributions, Net Cash Flow, Paid-in Capital, Valuation, and more.

Filters: Asset class (Equity/Buyout, Equity/VC, Debt, Real Assets, etc.), Geography, Vintage year, Industry, Fund size (min/max), Vehicle type (Fund or Fund-of-Funds).

3. Getting Started on Claude

3.1 Prerequisites

- An active Claude account (Enterprise or Pro)
- MSCI credentials (same login as MSCI ONE / Private I site)
- The relevant MSCI connector(s) enabled by your IT team — contact your MSCI account manager if not yet set up

3.2 Connecting the MSCI Connector

The MSCI connector is listed in Claude’s connector directory, allowing you to connect to it directly.. See Appendix B for step-by-step instructions to configure and use the Claude Connector for MSCI.

1	<p>Launch Claude</p> <p>Open Claude via the desktop app or claude.ai in your browser. Log in if prompted.</p>
2	<p>Open Settings → Connectors</p> <p>From the top menu, select File → Settings → Connectors (or navigate to Settings → Capabilities → Connectors).</p>
3	<p>Connect the MSCI connector</p> <p>Locate the MSCI connector and click Configure or Connect. You will be redirected to the MSCI login page.</p>
4	<p>Sign in with MSCI credentials</p> <p>Enter your MSCI username and password. Accept the app consent on first use.</p>
5	<p>Verify and start</p> <p>The connector will appear as Connected. Start a new chat, enable the MSCI connector from the chat input, and disable web search to ensure responses come from MSCI data.</p>

⚠ Important: Always disable web search when using MSCI connectors. This ensures responses are sourced from your entitled MSCI data, not from the open internet. You can verify the data source by looking for MSCI tool-call indicators (e.g., "executeIndexGQLSchema") in the response.

4. Tips for Best Results

Be specific about what you want

Include the index name, or fund type, geography, time period, or metric in your prompt. The more context you provide, the more accurate the result.

Instead of: "Show me performance."

Try: "Show me the 3-year annualized IRR for European Buyout funds, grouped by vintage year."

Iterate within a conversation

You can ask follow-up questions to refine your results. Claude maintains context across turns, so you can progressively narrow down your analysis without repeating the full query.

Use the right tool for the right question

- **IndexAI Insights:** Index search, index level data, performance, constituents, valuation ratios and fundamentals, factor analytics (FACS), Sustainability and Climate metrics, methodology documentation
- **PCI:** Private fund benchmarking, vintage analysis, peer comparisons

Ensuring MSCI-Sourced Responses

When you use the Connector, follow these guidelines to ensure that responses are sourced from MSCI data rather than from the AI model's general training data or the open internet:

- **Enable only the MSCI Connector:** Turn off web search and any other external data sources in the platform's settings.
- **Verify the data source:** Each time the AI provides an answer, look for tool-call references related to MSCI.
- **Ask the AI to confirm its source:** If you are unsure, you can ask the AI to confirm the source of the answer to verify that it is as MSCI-sourced information.

Downloading results

To download data or charts, include a download request in your prompt. Example: "Show me the year-to-date performance of the MSCI EM Index and download the data." Supported formats include CSV (convertible to Excel). Charts and additional formats may be available depending on the tool.

5. Entitlements & Data

The data you can access reflects your existing MSCI entitlements. Queries outside your license will not return results. Contact your MSCI account manager to expand access.

- **Index data:** Updated on a T+1 basis. No intraday data.
- **PCI benchmarking:** Updated quarterly in line with PCI universe updates.

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6. Troubleshooting

Capability	What You Can Ask
Response seems too general	Check that the MSCI connector is enabled and web search is disabled. Look for MSCI tool-call references in the response.
Query timed out	Simplify your prompt or break it into smaller requests (e.g., compare two indexes rather than five at once).
No data returned	Verify the data falls within your entitlements and that you are using the correct index name, geography path, or asset class.
Connector not appearing	Contact your IT team to confirm the MSCI connector has been configured. See Section 3 or reach out to your MSCI account manager.

7. Getting Help

- **MSCI Support:** Contact your MSCI account manager or submit a request via the MSCI support portal. Please contact ClientService@msci.com for support with IndexAI Insights. For PCI support please contact pcssupport@msci.com.
- **IT setup documentation:** Detailed connector configuration guides for Claude Enterprise are available from your MSCI representative.

8. Appendix A: IndexAI Insights

8.1 Use Cases & Example Workflows

The examples below illustrate how IndexAI Insights supports common client workflows. All responses are grounded in MSCI-sourced, entitlement-controlled content.

8.2 Insights & Analysis

IndexAI Insights supports iterative analysis: you can progressively refine your questions and build on prior responses within a single conversation.

Example workflow:

You Ask	IndexAI Insights Response
You: Compare the performance of my custom MSCI World Core Multi Factor Index against the MSCI World Index.	Returns a performance chart and comparison table, both downloadable as Excel files.
You: Show me the top 10 constituents of the custom index.	Displays constituent names, weights, and summary statistics.
You: What are the P/E and P/B ratios for the largest holdings?	Retrieves valuation metrics for the specified securities based on your entitlements.

8.3 Methodology Comparison

IndexAI Insights can produce structured, point-by-point comparisons drawn directly from public MSCI methodology documentation.

Example prompt: "What are the methodology differences between MSCI ACWI Quality and MSCI ACWI Momentum?"

IndexAI Insights will respond with a comparison covering:

- Factor definitions used by each index
- Security selection and eligibility criteria
- Rebalancing frequency
- Weighting approach

8.4 Content Creation & Communication

You can use IndexAI Insights to draft structured summaries and comparison narratives for internal discussions, presentations, or client communications.

Example prompt: *"Create a one-page comparison of the MSCI World Index and the MSCI USA Index for an investment committee."*

IndexAI Insights will produce a concise written summary highlighting key differences in coverage, composition, and performance characteristics. You can refine the output or export it for further use.

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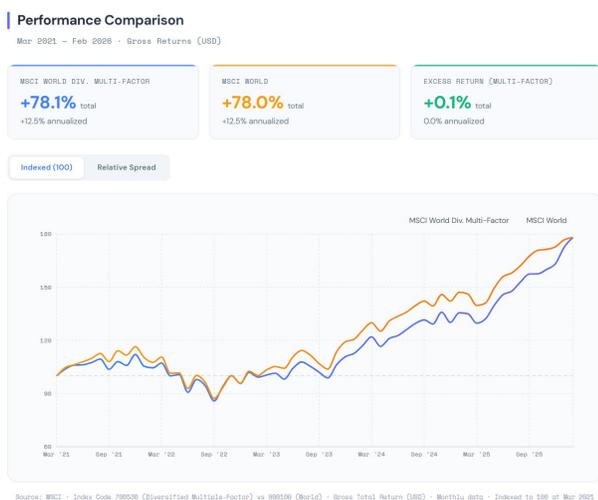
8.5 Charting and Visualization

Generate interactive charts, performance plots, and visual comparisons to help you understand index behavior and trends.

Charts can be customized by:

- Time period (e.g., year-to-date, trailing 12 months, custom date range)
- Currency (e.g., USD, EUR, local currency)
- Comparison parameters (e.g., relative performance)

Example: *"Plot performance comparison for MSCI World Core Multi Factor Index vs MSCI World Index."*



8.6 Analysis & Insights

Ask conversational questions to receive performance comparisons, constituent breakdowns, valuation summaries, and factor exposure analysis. You can refine your questions iteratively within the same session.

Example: "What is the Top 10 securities by weight of MSCI World Core Multi Factor Index?"

MSCI World Core Multi Factor Index (761497)

Total Securities: **388**

Rank	Security	Country	Weight (%)	Market Cap (USD Bn)
1	NVIDIA	US	4.95%	\$2,324.8
2	APPLE	US	4.55%	\$2,138.1
3	ALPHABET A	US	4.49%	\$2,107.3
4	MICROSOFT	US	3.89%	\$1,825.7
5	AMAZON.COM	US	2.57%	\$1,205.7
6	META PLATFORMS A	US	1.89%	\$886.5
7	BROADCOM	US	1.77%	\$831.4
8	LAM RESEARCH	US	1.77%	\$829.4
9	JOHNSON & JOHNSON	US	1.58%	\$739.8
10	NOVARTIS	CH	1.25%	\$584.8

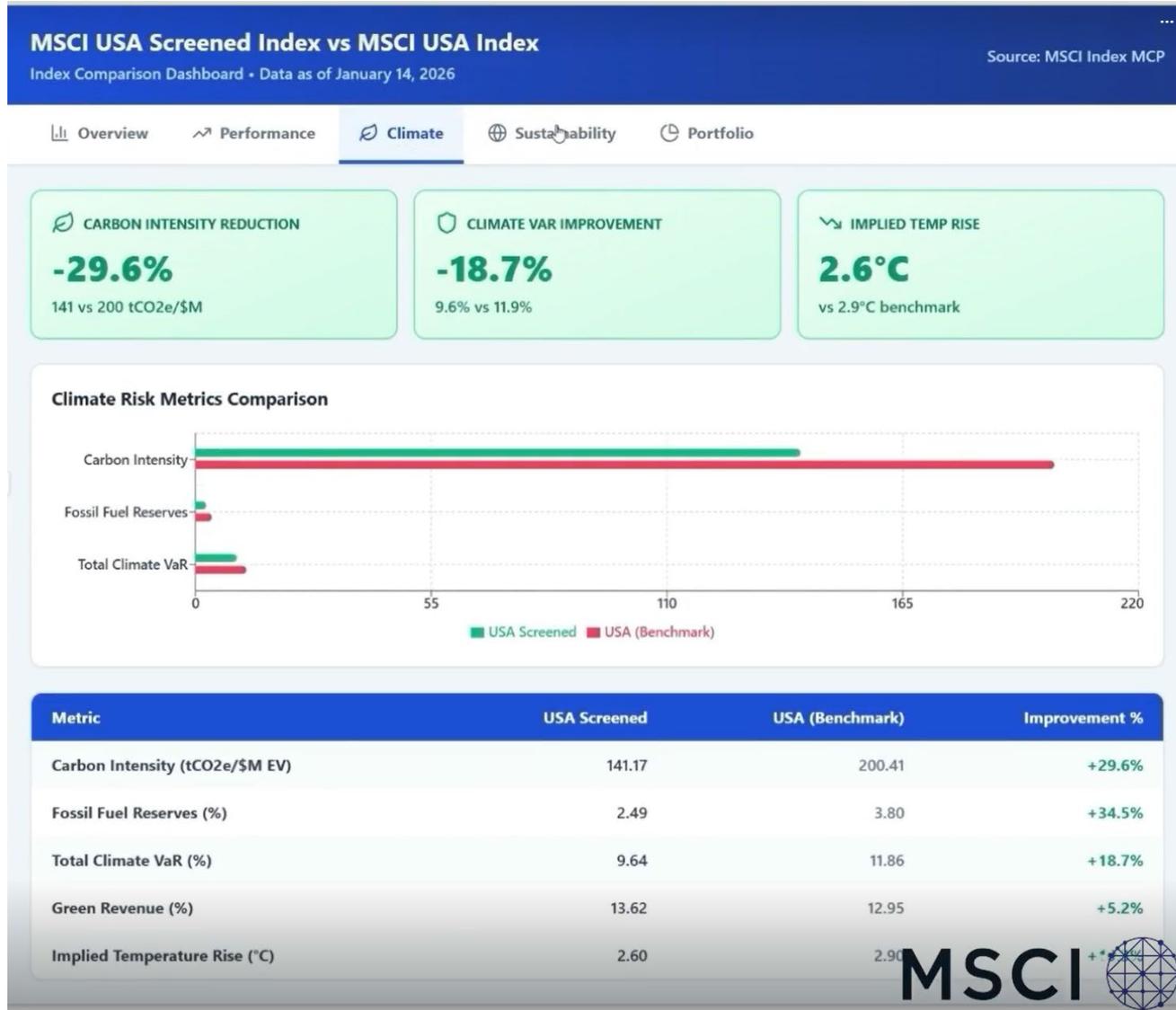
Top 10 Total Weight: 29.70%

8.7 Content/Blog Creation

IndexAI Insights can generate summaries suitable for presentations, or internal communications. You can request specific formats such as one-page summaries, comparison narratives, or briefing notes.

Example (below example uses Claude Desktop): "Draft a one page comparison dashboard for MSCI USA Screened Index and MSCI USA Index for our quarterly review."

The output can be refined through follow-up prompts and exported for further editing



9. Known Limitations

Please be aware of the following limitations when using IndexAI Insights. If you encounter issues not listed here, contact MSCI support (see Section 8).

Limitation	Description	Workaround / Next Steps
Entitlements	Some licensed index modules, custom indexes delivered solely via vendors, and certain data modules (e.g., Float, Thematic Exposure, Business Segment, Constituent AUM, Investability Data product, Sustainability Index Methodology Data, Factor Index Methodology Data, Index Rebalance Criteria Report) are not yet available through IndexAI Insights.	Contact your MSCI Client Services team with related queries.
Custom Index History	Historical data for custom indexes may be limited to 12 months.	For longer history, consult your MSCI Client Service team about alternative data delivery options.
Standard Index History	Historical data for standard MSCI indexes is available for up to 20 years, subject to data availability and your MSCI index license.	Consult your MSCI Client Service team about alternative data delivery options.
Long-Running Queries	Complex queries or calculations may time out or return incomplete/incorrect results due to processing or context-window constraints.	Simplify your prompt or break your request into smaller parts. For example, shorten the review period, or the amount of data that is to be extracted at once by the tool.
Complex Calculations	Complex calculations may not result due to context window limitations	Consult your MSCI Client Service team about alternative data delivery options.
Turnover	Currently the tool surfaces daily turnover (Index API) and doesn't yet reflect the one-way turnover definition used in MSCI Factsheet/Index Metrics (sum of rebalance-date turnover over the past year)	Support for the Factsheet-style calculation is expected as a future enhancement
ChatGPT access	Currently, the IndexAI Insights MCP connection is available only through the ChatGPT Web App, not the ChatGPT Desktop application.	This limitation has been raised with ChatGPT for enhancement.

Limitation	Description	Workaround / Next Steps
Pro Forma information	IndexAI Insights supports pro-forma date information, but currently it bases the pro-forma timing on the index’s indicative period. This usually aligns with the standard rebalance gap for most indexes, but it can differ for some (for example, GIMI indexes). Also, once the first day of that indicative period is reached (for example, T-9), the tool does not update to reflect additional pro-forma changes announced later in the advance notice window (for example, T-8 through T-1).	Consult your MSCI Client Service team for alternative pro forma information.
Index Name	Index names reflect the most recent naming conventions. Historical name changes are not represented in the tool.	For any historical index-name-related questions, please refer to the relevant index code in your search or reach out to the Client Service team for assistance.

10. Appendix B: Claude Desktop Connector Setup

This appendix provides instructions for connecting MSCI with Claude Desktop using the Model Context Protocol (MCP).

Prerequisites:

- Claude Desktop application installed
- MSCI client credentials with MSCI access

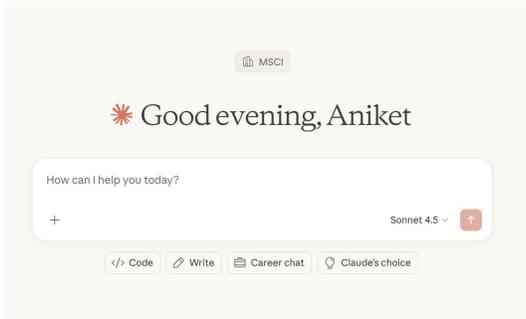
Compatible Environments:

- Claude Desktop (macOS, Windows)
- Claude Web

How to connect to the MSCI connector?

This section provides step-by-step instructions to configure and use the Claude Connector for MSCI. Each step includes a description along with a corresponding screenshot.

STEP 1



Launch Claude using Desktop Application or Web (<https://claude.ai/>)

Open Claude using the desktop application or access it via a web browser at <https://claude.ai/>. Log in with valid credentials if you are not already signed in. Upon successful login, the welcome screen will appear with navigation options on the left-hand side.

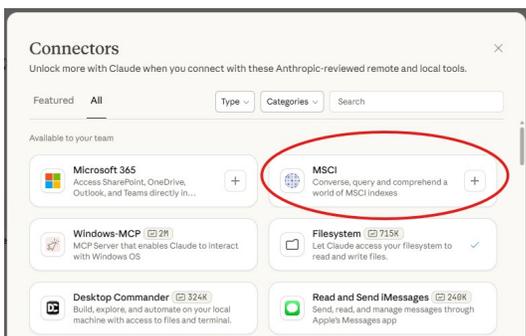
STEP 2



Open Settings

From the top menu, click on File and then select Settings to open the configuration panel.

STEP 3



Navigate to Connectors

In the Settings window, select Connectors under Capabilities. Locate the MSCI connector under Connectors – Browse Connectors menu.

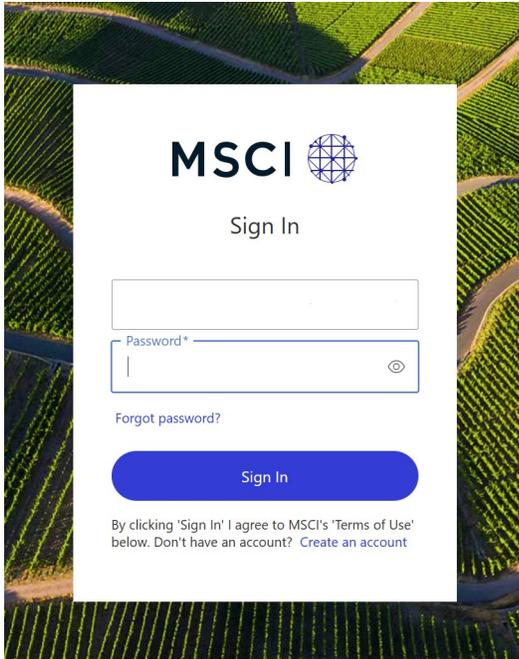


STEP 4

Initiate Index MCP Connector Configuration

Click on the '+' button for the MSCI connector to initiate connection.

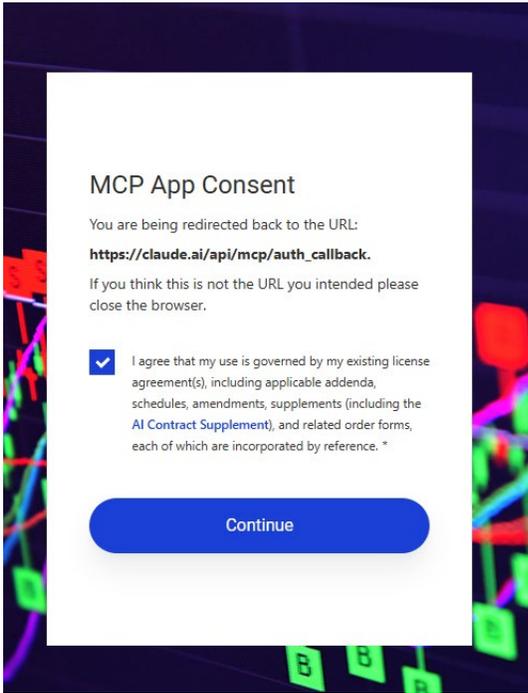
STEP 5



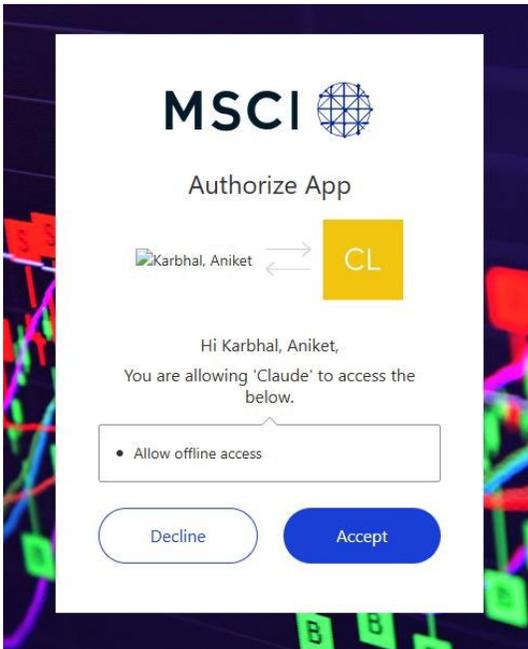
MSCI Sign-In

You will be redirected to the MSCI login page. Enter your MSCI credentials to proceed.

STEP 6

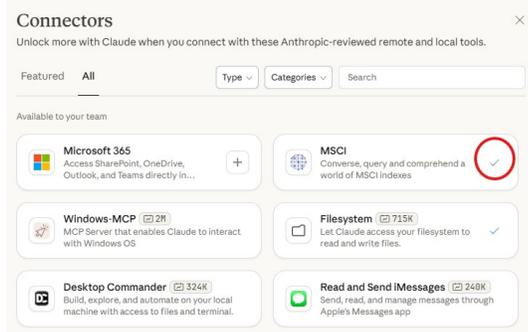


Accept the App Consent and Authorize Application Access



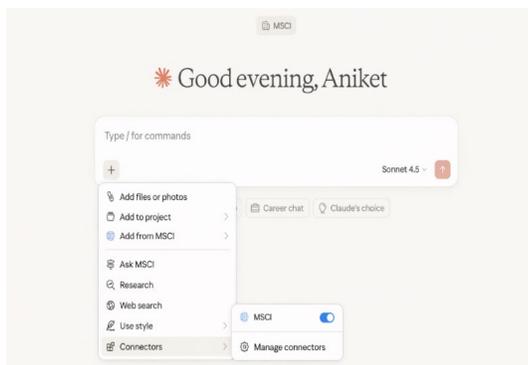
Review the access request and click Accept to authorize Claude to access MSCI.

STEP 7

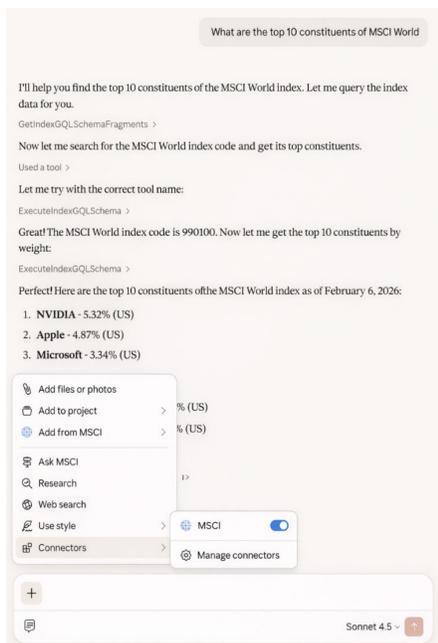


Verify Connector Availability

Once authorized, return to Claude. The MSCI Connector should now appear as connected.



STEP 8



Use MSCI in Conversations

You can now enable the MSCI Connector from the chat input options and start querying MSCI.

Note: Disable Web Search so that results are sourced exclusively from MSCI

11. Appendix C: FAQ

ClientService@msci.com

Based on your existing MSCI entitlements you can investigate index performance characteristics such as country, sector and factor exposures, constituent weights, and methodologies and explore private assets market trends, performance benchmarking, and holdings and risk factors.

Q: Is the data real-time?

No. Index data is updated on a regular schedule, generally on a T+1 basis. IndexAI Insights does not provide intraday data.

Q: Can I use IndexAI Insights for indexes I do not have a license for?

No. IndexAI Insights respects your existing MSCI entitlements. If you attempt to query data outside your license, the tool will not return results. Contact your MSCI account manager to discuss expanding your coverage.

Q: My query timed out. What should I do?

Try simplifying your prompt or breaking it into smaller requests. For example, instead of comparing five indexes at once, start with two. If the issue persists, contact MSCI support.

Q: How do I know whether a response comes from MSCI data?

When using external AI platforms, check for MSCI tool-call references in the response (e.g., "GetIndexGQLSchemaFragments" or "MSCI API"). If no such reference appears, the response may not be sourced from MSCI. See Section 3.2.1 for details.

Q: Can I redistribute MSCI content generated through Claude?

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