Make Your AI Tools Your Investment Workspace

Allvue® Investment Management MCP Connector lets you trade from your front office platform, inside the AI you already use.

Your team already uses AI for work. It's just been disconnected from your Allvue book of record. Now, Allvue's MCP connects your AI directly to your investment data, workflows, and logic.

Bring your trading desk into your AI workflow

Ask and Act in Plain English

- Turn plain-English instructions into structured orders, then carry each trade through its full lifecycle.
- Extract trade confirms from Teams, Outlook, Slack, or Excel and generate review-ready orders automatically.
- Chain agents, skills, and MCP capabilities into workflows that match how your desk actually trades.

Work With the Tools You Trust

- Compatible with Claude, ChatGPT, and Codex – simply connect and use.
- No separate logins or new screens to open. Work in the AI tools you're already using.
- Tailor workflow automation to your team's requirements and preferred processes.

Built on Governed Workflows

- Trades are checked against compliance and allocation rules automatically, before sizing and routing.
- Approve AI actions individually or fully automate part or all of the process.
- Allvue user permissions always apply, and every MCP action is logged to the individual user, providing a full audit trail.

AI-assisted workflows from start to finish



Trade Intake and Booking
Turn broker emails, Excel trade plans, and Teams requests into booked, allocated trades.

New-Issue Onboarding
Create new issuers and assets from credit agreements. Fill gaps with Bloomberg data.

Post-Trade and Operations
Monitor trade confirms, Excel reports, and Teams for breaks. Draft chaser emails.

Approvals and Governance
Send trade approval requests in Teams, monitor compliance digests, create audit packs in SharePoint.

Trade Management
Monitor Teams and email for trade-related questions, provide daily summaries, and answer ad hoc requests.

Who benefits

PMs and Traders
Move from plain-English request to booked, compliant trade in minutes.

Operations
Confirms and term sheets become review-ready orders without rekeying.

Investment and Ops Leaders
Scale trade volume, not overhead, with permission-based automation.

Coming Soon
Analysis of holdings and sec master data and hypothetical scenario management.

Interested?
Want early access? Ask your Customer Success Manager or Account Manager.

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Keep Every Deal Current From First Look to Monitoring

Allvue Investment Management MCP lets you create and update issuers, assets, and credits in Allvue in minutes using Claude, ChatGPT, or Codex.

Deal information sits across data rooms, email, term sheets, models, and memos. None of it reaches your credit record without hours of analysis and rekeying, and every change in terms or financials means doing it again. Allvue's Investment Management MCP helps deal teams cut credit setup from hours to minutes. You provide the deal documents and data, and it creates and updates the full record in Allvue.

Any Deal Data

- Update system with data from credit agreements, term sheets, models, emails, data room files and more, using your AI tool.
- Update one issuer, asset, or credit from several sources at once with your AI.
- Use your own templates and reporting formats, not a fixed document type.

Any Workflow Stage

- **Research:** Set up a deal for research as soon as a teaser or CIM arrives.
- **Deal Tracking:** Move deals to the next stage and keep them updated using your own workflow.
- **Monitoring:** Refresh records from each quarterly package so the credit stays current.

Governed in Allvue

- The workflow and system of record stay in Allvue, with no new interface or custom integration needed.
- Allvue user permissions apply, and every MCP action is logged to the individual user.
- Uses your configuration, with gaps flagged before anything is saved.

What you can create and update

Issuers

"Create the borrower from this teaser, then add sponsor, sector, and HQ country."

Assets and Credits

"Using the term sheet, set up the term loan and its credit: $50mm, S+550, 2030 maturity."

Financials and Capital Structure

"Load three years of financials and set up the capital structure."

Commentary and Activity Notes

"Log today's management call as an activity note."

AI-assisted workflows from start to finish

1 Screening

Turn inbound teasers, CIMs, and deal emails into a tracked pipeline deal. Benchmark opportunities with Nexius MCP.

2 Due Diligence

Easily enrich credits in Allvue with diligence data for more complete, accurate, and consistent records across every deal.

3 Deal Close

Create issuers, assets, credits, and commentary in Allvue from final documents and client spreadsheets.

4 Monitoring

Update financials, capital structure, and deal events in Allvue from borrower reports; draft borrower follow-ups, if required.

5 Portfolio Review

Generate portfolio summaries from Allvue data for investment committees, investors, and leadership, replacing manual report preparation.

Who benefits

Credit Operations

Set up new credits without rekeying, with gaps flagged before anything is finalized.

Credit Analysts

Financials, capital structure, and commentary are ready for analysis.

Investment and Ops Leaders

Scale deal volume, not overhead, with consistent records from any source.

Interested?

Want to try the beta MCP? Ask your Customer Success Manager or Account Manager.
Need broader document management and data traceability? Ask us about Document IQ.

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