



TradingTech

Insight

From **A-TEAM** GROUP

**Using AI for rapid access
to robust, accurate and usable
insights:** How AI is enabling data
discovery for optimal trading
and investment decisions

Commissioned by:

LSEG

Table of Contents

Introduction	3
The problem of data overload	4
Using AI for data discovery, interoperability and personalisation	6
Data integration and the criticality of user experience optimisation	9
Translating into real-world experiences	10
How traders and investment managers benefit	12
About LSEG	14

Introduction

"The advent of agentic AI or AI agents is expected to move the landscape further towards real-time, 24/7 end-to-end automation in sales and trading." – Practitioner at a Tier 1 UK sell-side institution.

Data discovery is rapidly emerging as a key differentiator for financial market practitioners managing vast volumes of information and insights. For traders and investment managers, timely access to relevant financial content is critical to performance, and the demand for robust, accurate data has never been greater.

At the same time, user convenience is paramount. Financial information providers need to ensure delivery of the right content to customers in a timely and easy-to-digest way. Services need to be compliant with applicable regulations. And content needs to be of high quality to improve decision making for optimal actions and outcomes.

AI can make it easier for market practitioners to discover content. AI also helps consolidate fragmented data sources and offer visualisations, helping to make data simple to digest, resulting in cost efficiencies, time savings and performance benefits.

LSEG has partnered with Microsoft and others such as Rogo, to address the potential of adding AI to workflows in the trading and investment segment. Specifically, it is working with partners to add world-leading UX/UI models, allowing for an immersive experience where collaboration and augmentation come together.

What is augmentation?

Customers need to make faster, smarter, more confident decisions - and they want complete confidence that speed does not compromise quality. AI is part of the solution when solving this problem, by augmenting workflows with AI and personalisation tools. With AI-enabled discovery and visualisation, customers can get better insights, at speed.

Using AI, LSEG can integrate data into Microsoft Teams to facilitate streamlined workflows, optimise meeting preparation and deliver personalised AI-driven insights. This integration of AI technologies demonstrates how augmentation can significantly reduce time spent on data discovery and report generation.

This paper explores how AI can improve trader and investment manager workflows, highlighting real-world deployments that are already delivering measurable benefits. As these technologies become more embedded in financial decision-making, their success increasingly depends on trust, scale, and transparency.

The problem of data overload

Traders and investment managers historically have been well served by the data they use to inform their decision making. Data is critical to financial institutions' ability to succeed in market activities.

Most traders and investment professionals, however, face several key challenges with respect to data access and management. The first is the sheer volume of data available. With many financial exchanges, brokers and research organisations globally generating pricing, news and analysis, this leads to an industry-wide problem of too much content and significant 'noise', making it hard for users to find relevant content.

This content is usually accessed across multiple platforms and applications – an approach that suffers from integration frictions, resulting in points of weakness, costly and time-consuming bespoke technology builds, slow deployment, data errors and gaps in coverage.

On top of this, the volume of structured and unstructured data creates significant hurdles to data ingestion and analysis. While LSEG Workspace adds structure to many sources of financial content, including market and reference data, a lot of the context around these datasets continues to exist in unstructured data formats, such as emails, PDFs, transcripts, filings and research documents.

Structured and unstructured data

Structured data is organised in predefined formats which are easy to search and analyse, such as spreadsheets and databases.

Unstructured data does not have a predefined format, such as text documents, images, audio and video files.

According to a data manager at a Tier 1 global custodian, "Previously, documents like client contracts or KYC forms were stored in one place with metadata governed separately from structured repositories. Now, AI can scan through these

and pull out the metadata for the documents, including client name, address, industry code and risk rating. While people don't trust this capability fully yet, they will use it to crunch through thousands of documents in minutes rather than months, and then apply human review to identify discrepancies."

This example underscores a broader concern: data quality and trust. As Emily Prince, Head of Analytics and AI at LSEG, puts it, trusted data is the foundation of any successful AI use case. "If you have limited, unverifiable, poor quality or not easily accessible data, your ability to help your customers differentiate is limited."

Ultimately, the challenge for practitioners lies in cutting through the noise of multiple sources of insight to access the right data and analysis at the precise moment it's needed. Says the UK sell-side practitioner: "The overall trajectory in financial services is towards processes becoming more continuous and hands-off, with humans being more 'in the loop' than constantly 'at the helm'. This involves moving from discrete model development on historical data to 24/7 real-time systems using diverse data sources like social media, images and earnings calls. Getting to this state, however, requires significant infrastructure and time."

Using AI for data discovery, interoperability and personalisation

Traders and investment managers are increasingly leveraging AI capabilities to navigate the growing complexity and fragmentation of financial data. From search and discovery to integration and personalisation, AI offers new ways to access, analyse and act on information – using natural language, contextual understanding and automation to streamline workflows and improve decision making.

Rethinking data discovery with AI

AI can significantly enhance data discovery by enabling users to interact with data using natural language, supporting how traders and investment managers operate. Instead of relying on technical syntax or navigating complex platform structures, users can pose questions in plain language and receive relevant insights.

Prince sees search, discovery and summarisation together as representing a cluster of AI capabilities that address the fundamental problem of accessing and making sense of vast amounts of information, whether it's documents, data, or subject matter expertise. The goal, she says, is to gain efficient access to this information based on user prompts, in any language, which is "incredibly powerful for financial services."

Bart Joris, head of FX sell-side trading proposition at LSEG, adds: "AI allows platforms, like LSEG Workspace, to look into the intent of the conversation or query to bring relevant data towards the users." This is key to bridging the gap between a person talking 'trader language' and the technical language needed to make an API call to retrieve structured data.

According to the sell-side practitioner, "AI agents are expected to have the biggest impact in use-cases that require gathering and synthesising information from diverse sources to generate insights for human action." Increasingly, consumers will be able to use natural language to source new insights and commission tasks to AI agents.

This new search model also includes a shift from pull to push experiences. AI can find relevant content based on user context, ensuring important data points aren't missed. "Users don't necessarily want to go to a specific app each time they need a data point," says Akansha Goyal, product lead for LSEG Workspace AI and Personalisation specialising in content discovery at LSEG. "They want relevant and accurate insights summarised and delivered to them quickly."

Automating workflows and enhancing interoperability

Beyond answering specific questions, AI enables systems that can move from one task to another, leveraging large language models (LLMs) to understand the broader intent behind a query, and retrieve the most relevant insights from a data platform like LSEG Workspace.

AI also plays a role in monitoring and control. In highly automated trading scenarios, Joris explains, AI can serve as a control mechanism – monitoring algorithmic behaviour, identifying anomalies, and flagging them to human risk controllers to ensure compliance and reduce the risk of market disruptions.

As previously mentioned, AI also helps process and summarise both structured and unstructured content, from earnings calls and news services to research documents. "Whether it's structured data needing summarisation from a large database or unstructured text needing key headlines," says Joris, "AI models are rapidly evolving to do this accurately."

Joris cites LSEG's partnership with Tradefeedr, a foreign exchange Transaction Cost Analysis (TCA) platform, as an example of AI assisting in the integration and analysis of data. By using AI to process historical trade data from Tradefeedr and real-time market data to derive insights and facilitate discussions around improving executions, traders and investment managers are able to analyse and benchmark their trade executions against market segments or competitors. In this instance, AI helps interpret the user's request (for example, asking for benchmarking data in chat) and retrieves the necessary structured data from the analytics platform.

Getting personal

Personalisation is another key area where AI is being deployed to tailor the financial data experience to individual users' needs and workflows. Prince envisions a significant shift towards personalised financial services, noting that while chat interfaces offer a degree of personalisation, the industry is only at the beginning of this journey.

"The biggest kind of step changes are coming" she says, "as people are able to increasingly tailor based on preferences, history and other parameters." The goal is to "recognise the individuality of people and better serve them in that personalised way," delivering "the right information to the right individuals at the right moment."

Goyal's team at LSEG focuses on this, using AI to analyse usage data and user interactions to push highly targeted content and alerts. "We look at everything from AI search and content discovery to product usage and telemetry," she says. "The goal is to make the user's experience significantly better by making the platform more intuitive, and relevant and hyper-personalised."

Natural language interfaces further enhance personalisation by responding directly to user intent and context, building personalised workflows that surface not just relevant content, but interactive UI widgets, allowing users to take action, explore data, or trigger tools in-line – without requiring users to navigate generic menus or applications.

Rapid evolution, varied approaches

Approaches to AI adoption vary widely. Some firms are adopting a hybrid model that combines a group-wide layer for strategy, governance and policy with decentralised execution. In this model, business units manage their own operating committees, prioritise use-cases based on risk and benefit, and manage risks specific to their domains.

Others are pursuing mass adoption of agents, empowering teams to create AI agents within defined frameworks. "Something like 95% of the firm has access to our AI agent workbench," says the head of data management at the US custodian. Many of the agents and models created in this way will remain on the desktops of their creators, for exploration and experimentation, he says. But some will gain wider acceptance, providing a bottom-up approach to AI proliferation.

Notwithstanding this enthusiasm, the industry recognises that 'getting there' requires a lot of infrastructure investment and careful steps. Says the UK sell-side practitioner: "More controls for agentic AI are expected, likely starting with low thresholds and narrow risk appetites."

Adds the head of AI at a Tier 1 US fund manager: "A primary challenge for agentic AI is agency and responsibility. Who makes decisions on behalf of whom? What happens if the action was not good and harms someone? Who is responsible?"

This practitioner stresses that "it's crucial to understand that humans are responsible for the data and models, as AI is not a sentient entity. Independent data testing, similar to stress testing in financial models, is vital for ensuring accuracy and preventing bias. Trustworthy data is fundamental for any conversation," she continues, "from a simple average to complex AI models. Incorrect data, even in simple scenarios, can have significant consequences."

Data integration and the criticality of user experience optimisation

With practitioners now deploying AI models to help source and consolidate fragmented and hard-to-find data sets, visualisation can play a key role in making data and analysis easy to digest. By adopting a robust UX/UI model at the intersection of collaboration and augmentation, firms can deliver immersive experiences that enhance the value of their data infrastructure and operations.

"Trusted data is foundational for anyone working in financial markets," says Nej D'Jelal, Group Head, LSEG Workspace platform. "AI enables us to unlock a world of data and market intelligence through new capabilities and trading tools. With features such as AI news summaries, economic forecasts, and marketing sentiment tracking, traders and analysts can consume more information faster, uncover new trends, and make smarter decisions in real time."

This evolution is driving a shift in platform UX, moving away from traditional, siloed applications towards a more interoperable approach. Where in the past, users had distinct sets of applications – some for chat, some for workflow functions – this new approach aims to create a single immersive experience, in which users interact with the system in a more intuitive manner.

"But in the financial world, interoperability and intercompany collaboration has to be underpinned by accuracy, auditability and licencing," adds D'Jelal. "These are non-negotiables."

The ultimate aim of this sophisticated UX/UI and underlying interoperability is a seamless workflow. This mix of collaboration and augmentation can be illustrated by the Chat to Trade function within LSEG's Advanced Dealing FX collaborative arranging platform. From a discussion in LSEG Messenger, users can initiate a regulated trade directly using a command such as '/trade'. This allows traders to move efficiently from discussing terms with a counterparty to executing the trade within the same product interface. LSEG's integration with Microsoft Teams makes this kind of convergence possible, with AI adding relevant data directly into the chat to provide context using custom LSEG bots and connectors integrated with Microsoft Teams.

Financial professionals are already benefiting from AI's ability to consolidate and summarise fragmented data, making vast information volumes manageable. Combined with modern UX, these capabilities are transforming how users interact with data – moving from disjointed experiences to streamlined, actionable workflows.

Translating into real-world experiences

These capabilities are now translating into real-world experiences in a growing number of ways. Here are three examples:

Pre-trade data discoverability and analytics



A significant pain point for financial professionals is the need to access relevant data quickly and efficiently, especially when discussing potential trades. AI is addressing this by augmenting data sets for discovery and processing. In trading, this could be manifested by incorporating advanced analytics, specifically TCA, directly into collaborative workflows.

For example, a sales trader could initiate a conversation with a prospective client using Open Directory, a new collaboration capability currently being piloted in LSEG Workspace, integrated in Microsoft Teams using LSEG-developed connectors. Open Directory will provide a user directory and network, enabling access and connectivity with customers, prospects and internal and external colleagues within the Microsoft Teams environment, making collaboration faster and more intuitive. During the discussion between the sales trader and prospect, the prospect can ask about past trade performance with their provider bank using natural language. The AI-supported system interprets the query – framed in 'trader language' – and translates it into a programmatic call to retrieve structured data from relevant databases, such as the firm's past trades and associated analytics.

If the analytics reveal outliers or suboptimal execution, the customer can then seamlessly transition from data analysis (augmentation) to discussion (collaboration) with the salesperson within the same interface. They can share the findings, ask why certain rates or latencies occurred, and collaboratively explore ways to improve future execution, such as trying different algorithms or execution methods.

This integration ties analytics directly into the conversation, augmenting the discussion and driving decision making without requiring users to switch between disparate applications for chat, data and analytics. AI's ability to interpret natural language and present insights in a digestible format can facilitate continuous collaboration around execution improvement – enabling new forms of conversation not always possible via traditional channels like phone calls.

Research summarisation for faster insight generation

The volume of available content can make it challenging for financial professionals to quickly identify actionable insights. Advanced AI models can help process large volumes of unstructured data, supporting analysts who need summaries of complex documents like earnings call transcripts or research reports.

Instead of reading through these lengthy documents, a user can ask a natural language question about a specific topic, company or event. The AI system understands the intent, searches across vast quantities of unstructured content, and summarises the relevant information. For instance, a user might ask how a company's cost drivers have evolved over several earnings calls or what a particular analyst's view is on a topic. The AI returns concise, aggregated summaries or key headlines, allowing users to grasp key insights quickly.

This capability streamlines research workflows and goes beyond direct answers – proactively surfacing related content or widgets based on inferred user interests. This ensures users don't miss important information and encourages a broader horizon view of the data. The goal is faster content discovery and simplified presentation to support efficient analysis.

Personalisation through intelligent content and capability discovery

Historically, users had to navigate a platform with many discrete applications to find the specific content or functionality they needed. The challenge was finding the right data points or understanding where to go for certain information. Under the emerging AI-driven UX/UI model, users experience a single, immersive platform that intuitively understands their needs and proactively brings relevant information and capabilities to them.

AI within the personalisation layer analyses the user queries and draws from various parts of the platform, presenting insights through modular components or widgets. Users don't necessarily need to know which underlying service provided the data; they can simply receive the information they need.

This seamless flow, where information is intelligently discovered, aggregated and presented directly to the user based on their inferred intent, is a key personalisation use case enabled by the sophisticated UX/UI and underlying AI capabilities.

How traders and investment managers benefit

From these use cases, traders and investment managers stand to gain significantly in terms of speed, performance, efficiency and opportunity.

Deploying AI to improve data discovery can afford traders and investment managers faster access to relevant data and analytics, such as TCA, directly within their collaborative workflows and conversations, eliminating the need to switch between disparate applications. Natural language queries can be immediately translated into programmatic calls to retrieve structured data, accelerating data access and potentially making the difference between fulfilling an order or failing to do so. Chat-to-trade functionality further enhances speed, allowing execution directly from a conversation.

For investment managers, AI-powered data discovery and augmentation significantly improve both workflow efficiency and insight quality. Natural language search capabilities allow users to find relevant information quickly, supporting faster responses to market opportunities.

AI also reduces the burden of processing large volumes of unstructured data, such as research reports and earnings call transcripts, enabling managers to grasp key points without reading lengthy documents. This provides greater insight to financial professionals, resulting in better decision making and overall improved performance. At the same time, traders can benchmark their execution against the market or competition using augmented TCA data, driving continuous improvement through integrated messaging networks.

The use of natural language queries and commands to access trading data programmatically bypasses the need for complex syntax or code to generate sophisticated analysis or initiate price discovery, boosting trade efficiency through pure productivity gains. AI helps distil relevance from the 'noise' of large datasets by summarising unstructured content, reducing manual search efforts and allowing consumers to focus on what's important. Traders benefit from operating within familiar interfaces like Microsoft Teams, with seamless single sign-on boosting overall efficiency.

AI's ability to aggregate fragmented data and visualise complex information in intuitive formats supports deeper analysis. By suggesting related content, AI systems provide managers with a more holistic understanding of market dynamics. Using AI tools like Microsoft 365 Copilot for data manipulation in Excel or other applications can further support analytical performance.

Finally, traders may enjoy more opportunity for profit from identifying outliers or areas for execution improvement through analytics. Using real-time transaction data to drive analytics and price discovery can reveal new opportunities, effectively turning compliance data into a profit-generating asset.

For Prince, the application of AI primarily translates into increased productivity for customers, enabling them to solve tasks faster, at scale. This speed is not just about efficiency; it serves a strategic advantage in financial services, whether for traders or researchers.

Prince highlights that improved accessibility to data through AI-powered chat interfaces enhances decision making, enabling time-critical actions when and where they're needed. This combination of speed and access empowers customers to carve out a distinct competitive edge in the market.

Beyond driving productivity, Prince sees AI as a catalyst for delivering personalised insights and enabling the creation of entirely new products and capabilities, opening up a world of opportunity.

About LSEG

LSEG is one of the world's leading providers of financial markets infrastructure and delivers financial data, analytics, news and index products to more than 44,000 customers in over 170 countries.

Through the three pillars of our AI Strategy, LSEG Everywhere, we are setting the standard for trusted AI in finance.

- Trusted data – our open, partnership approach fuels AI in financial services with world-leading, high-quality, accurate data
- Transformative products – delivering new AI products that enable our customers to work faster, smarter and with confidence
- Intelligent enterprise – using AI to drive efficiency, innovation and growth across our operations

We help organisations fund innovation, manage risk and create jobs by partnering with customers at every point in the trade lifecycle: from informing their pre-trade decisions and executing trades to raising capital, clearing and optimisation.

Backed by more than three centuries of experience, innovative technologies and a team of over 26,000 people in 65 countries, we are driving financial stability, empowering economies and enabling you to grow sustainably.

Find out more: lseg.com

Discover LSEG Workspace - our next-generation data and analytics workflow solution

LSEG Workspace creates a seamless experience across channels and devices with augmented, interoperable and collaborative workflows that streamline tasks and boost efficiency.

Intuitive, predictive discovery gives you a personalised and continually evolving interface that adapts to your needs, with powerful navigation and AI-powered recommendations to help you predict your next best move. Leverage best-in-class data and analytics, unmatched multi-asset class content and a single hub for broad and deep information.

[Discover LSEG Workspace.](#)

A-TEAMGROUP

For Marketing: www.a-teamgroup.com

For Content: www.a-teaminsight.com

A-Team Group is not a licensed investment advisor and therefore does not offer investment advice. The opinions and information provided in this material reflect our judgment as of the publication date and may change at any time without prior notice. This material is intended solely for informational purposes and should not be interpreted as investment advice. Although the information herein is derived from sources believed to be reliable, A-Team Group makes no warranty as to its accuracy or completeness.