Announcements

Advancing Claude for Financial Services

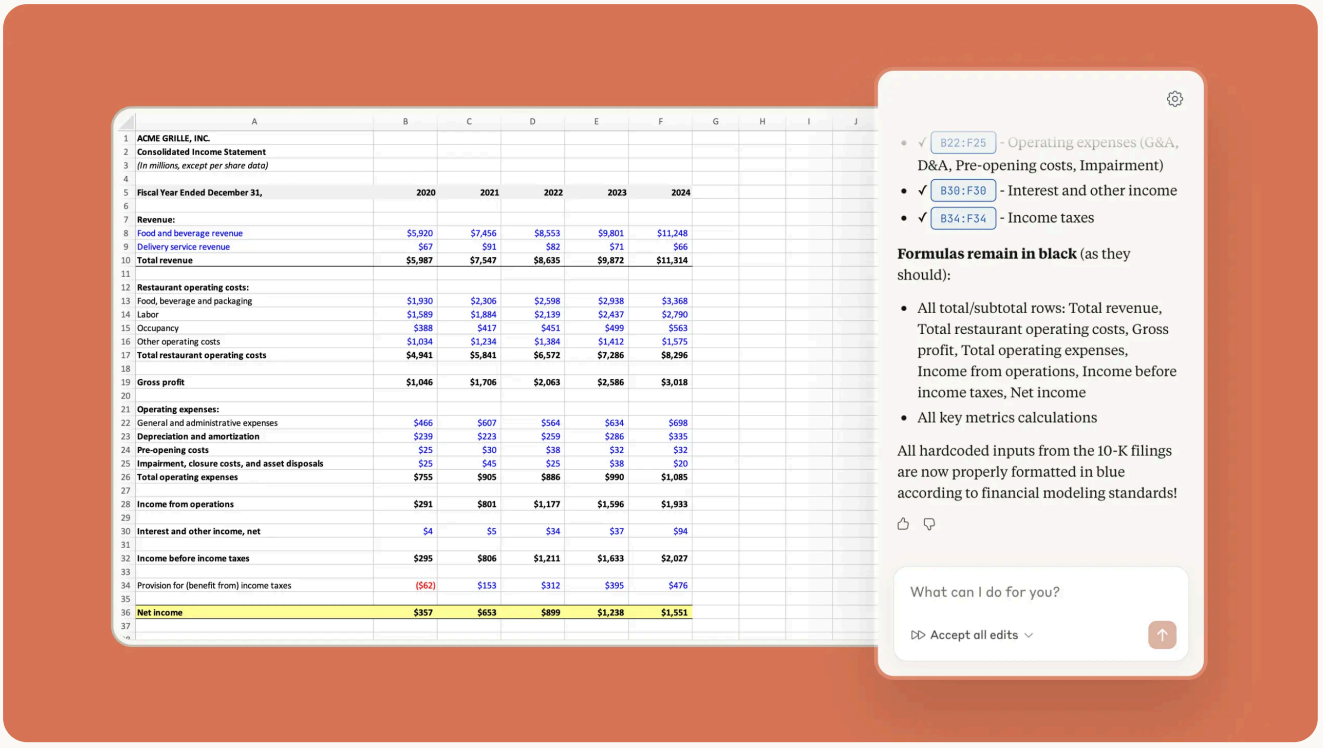
Oct 27, 2025 • 4 min read

We're expanding Claude for Financial Services with an Excel add-in, additional connectors to real-time market data and portfolio analytics, and new pre-built Agent Skills, like building discounted cash flow models and initiating coverage reports.

These updates build on Sonnet 4.5's state of the art performance on financial tasks, topping the Finance Agent benchmark from Vals AI at 55.3% accuracy. They augment Claude's intelligence with solutions for time-consuming but critical financial work, built into preferred industry tools.

Claude for Excel

We're releasing Claude for Excel in beta as a research preview. This allows users to work directly with Claude in a sidebar in Microsoft Excel, where Claude can read, analyze, modify, and create new Excel workbooks. Claude provides full transparency about the actions it takes: it tracks and explains its changes and lets users navigate directly to the cells it references in its explanations.



Claude analyzes a spreadsheet containing Acme Grille, Inc.'s consolidated income statement from 2020-2024, providing real-time guidance on financial modeling.

This means that Claude can discuss how a spreadsheet works, modify it while preserving its structure and formula dependencies, debug and fix cell formulas, populate templates with new data and assumptions, or build new spreadsheets entirely from scratch.

Claude for Excel adds to our existing integrations with Microsoft's applications. In the Claude apps, Claude can also create and edit files, including Excel spreadsheets and PowerPoint slides, and connect to Microsoft 365 to search for files, emails, and Teams conversations. Select Claude models are also available in Microsoft Copilot Studio and Researcher agent.

Claude for Excel is now in beta as a research preview for Max, Enterprise, and Teams users. We'll collect real-world feedback from 1,000 initial users before rolling the feature out more broadly. To join the waitlist, click here.

Connecting Claude to live information

Connectors provide Claude with direct access to external tools and platforms. In July, we added connectors for S&P Capital IQ, Daloopa, Morningstar, and PitchBook. We're adding new connectors that give Claude immediate access to more information in real time:

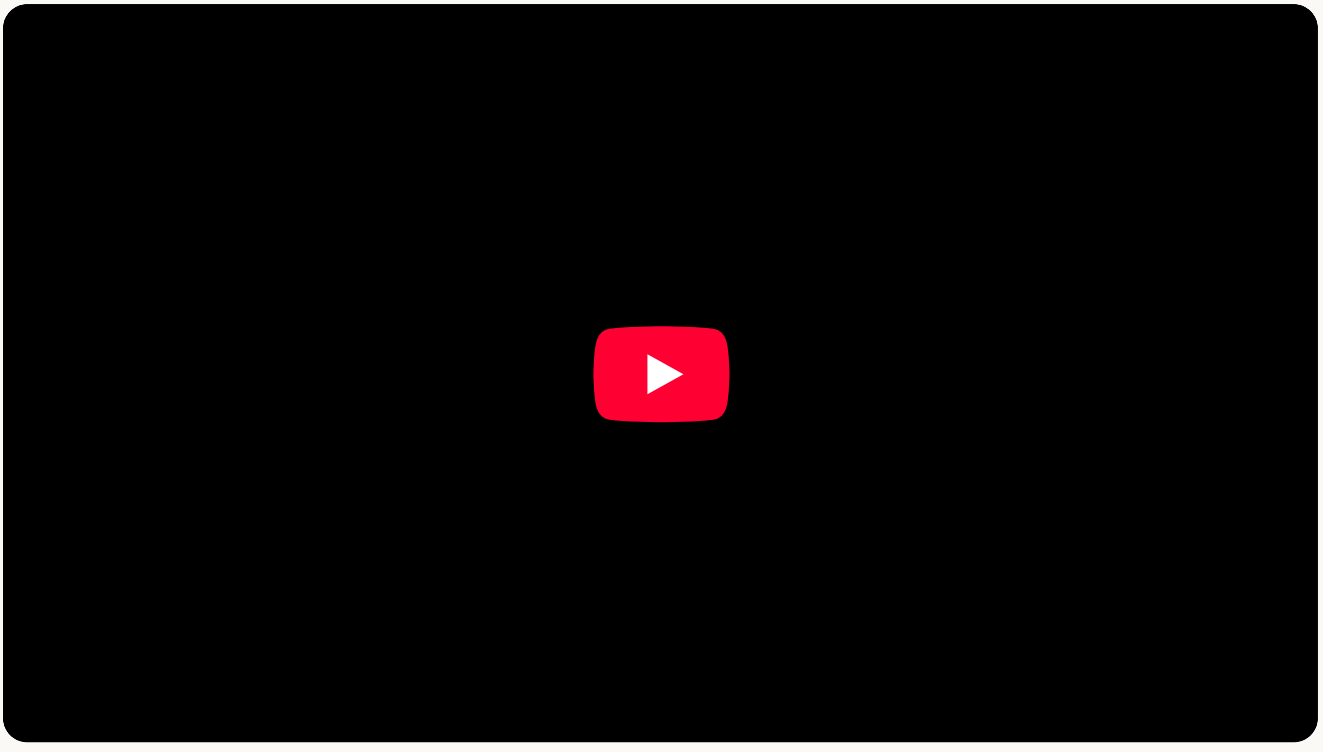
- **Aiera** provides Claude with real-time earnings call transcripts and summaries of investor events, like shareholder meetings, presentations, and conferences;
- Aiera's connector also enables a data feed from **Third Bridge**, which gives Claude access to a library of insights interviews, company intelligence, and industry analysis from experts and former executives;
- **Chronograph** gives private equity investors operational and financial information for portfolio monitoring and conducting due diligence, including performance metrics, valuations, and fund-level data;
- **Egnyte** enables Claude to securely search permitted data for internal data rooms, investment documents, and approved financial models, while maintaining governed access controls;
- **LSEG** connects Claude to live market data, including fixed income pricing, equities, foreign exchange rates, macroeconomic indicators, and analysts' estimates of other important financial metrics;
- **Moody's** provides access to proprietary credit ratings, research, and company data – including ownership, financials and news on more than 600 million public and private companies – supporting work and research in compliance, credit analysis, and business development;
- **MT Newswires** provides Claude with access to the latest global multi-asset class news on financial markets and economies.

For details on MCP connector setup and prompting guidance to maximize the benefit of each connector, see our documentation here.

New Agent Skills for finance tasks

Earlier this month, we introduced Agent Skills. Skills are folders that include instructions, scripts, and resources that Claude can use to perform given tasks. Skills work across all Claude apps, including Claude.ai, Claude Code, and our API. To make Claude better at financial services tasks, we've added 6 new skills:

- **Comparable company analysis**, with valuation multiples and operating metrics, which can be easily refreshed with updated data;
- **Discounted cash flow models**, including full free cash flow projections, WACC calculations, scenario toggles, and sensitivity tables;
- **Due diligence data packs**, processing data room documents into Excel spreadsheets with financial information, customer lists, and contract terms;
- **Company teasers and profiles**, condensed company overviews for pitch books and buyer lists;
- **Earnings analyses**, which research quarterly transcripts and financials to extract important metrics, guidance changes, and management commentary;
- **Initiating coverage reports** with industry analysis, company deep-dives, and valuation frameworks.



As with Claude for Excel, these new skills are being rolled out in preview for Max, Enterprise, and Teams users. You can sign up on behalf of your team or organization here.

Claude's impact in financial services

Claude is already widely used by leading banking, asset management, insurance, and financial technology companies. It supports front office tasks like client experience, middle office tasks in underwriting, risk and compliance, and back office tasks like code modernization and legacy processes. With ongoing updates to our models and products specific to financial services, we expect Claude to become even better in roles like these.

"Citi chose to leverage Claude as part of its AI powered Developer Platform because of its advanced planning and agentic coding capabilities, focus on safety and reliability, and compatibility with our workloads.

David Griffiths
CTO, Citi

"Working with Anthropic goes beyond deploying another AI tool—it's about partnering with a company that understands the complexity that financial services requires. Claude excels by seamlessly integrating multiple data sources and automating workflows that previously consumed significant time.

Bobby Grubert
Head of AI and Digital Innovation, RBC Capital Markets

Below, Alexander Bricken, Applied AI Lead for Financial Services, and Nicholas Lin, Head of Product for Financial Services, discuss Anthropic's research and product strategy within financial services, as well as customer examples.

Getting started

To learn more about using Claude for Financial Services, see here or contact our sales team. And to see the new features in action and hear directly from financial services leaders, you can also register here for our launch webinar.

Anthropic officially opens Tokyo office, signs Memorandum of Cooperation with the Japan AI Safety Institute

Oct 29, 2025

News

Seoul becomes Anthropic's third office in Asia-Pacific as we continue our international growth

Oct 23, 2025

News

Expanding our use of Google Cloud TPUs and Services

Oct 23, 2025

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Haiku

Solutions

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Code modernization

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Claude Developer Platform

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Terms and policies

Privacy choices

Privacy policy

Responsible disclosure policy

Terms of service: Commercial

Terms of service: Consumer

Usage policy

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