



Evolution of Copilots & Agents in Financial Services

Adrian Crockett

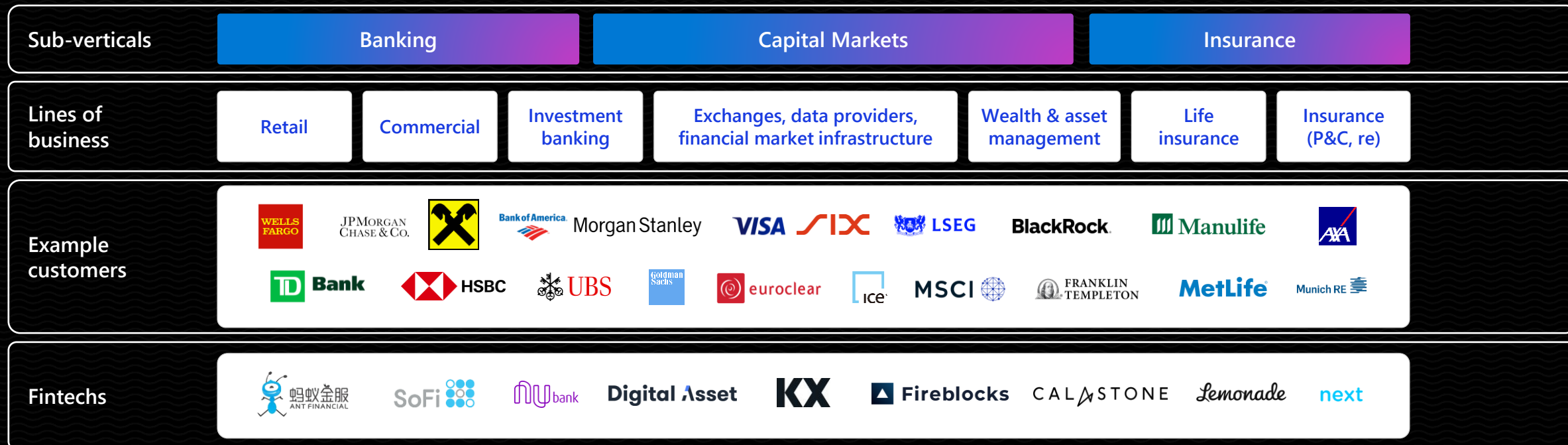
General Manager & Head of Product, Microsoft Cloud for Financial Services

Paul Lehner

Director, Capital Markets Digital Strategy

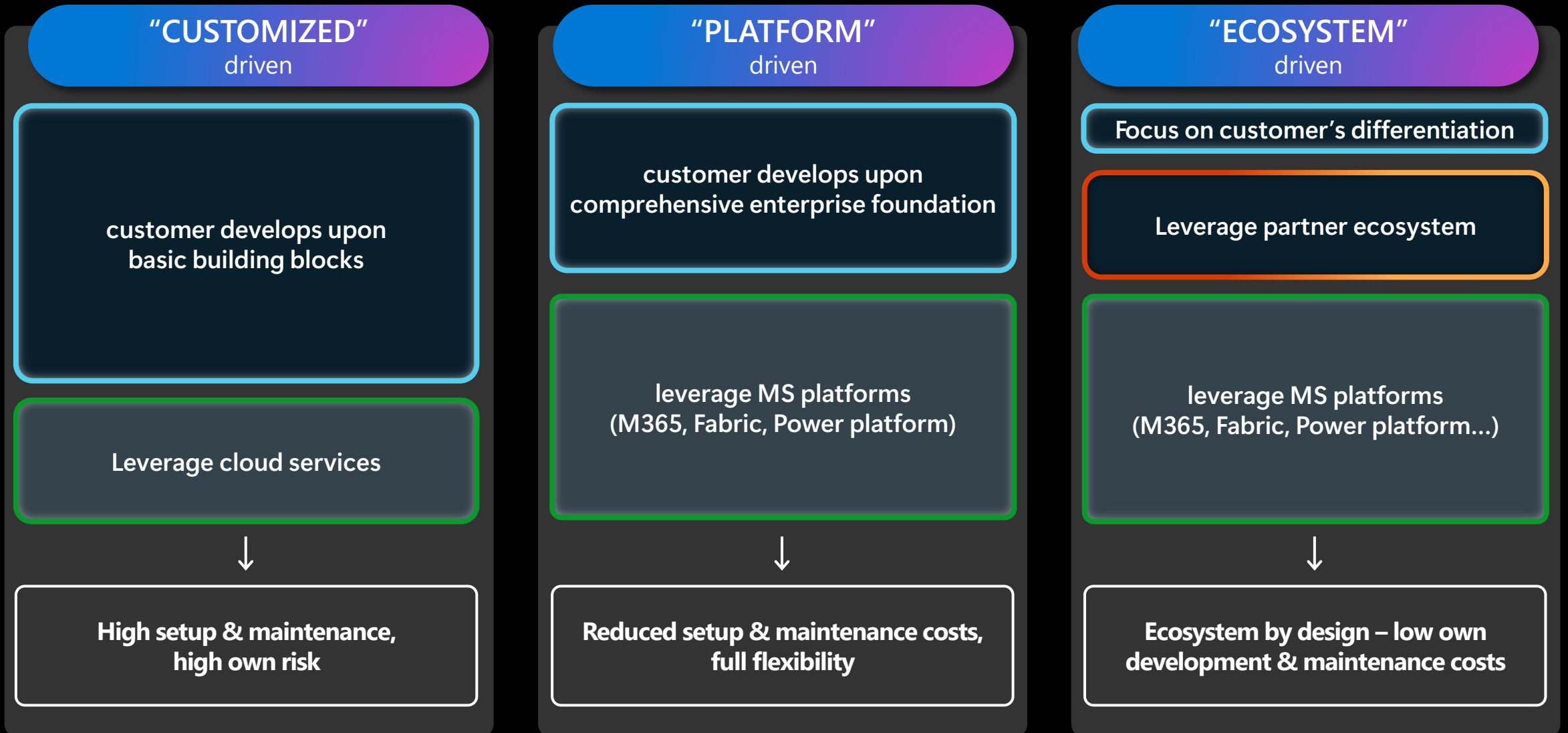


Our industry mission: Accelerate innovation and unlock new value with deeper customer connections



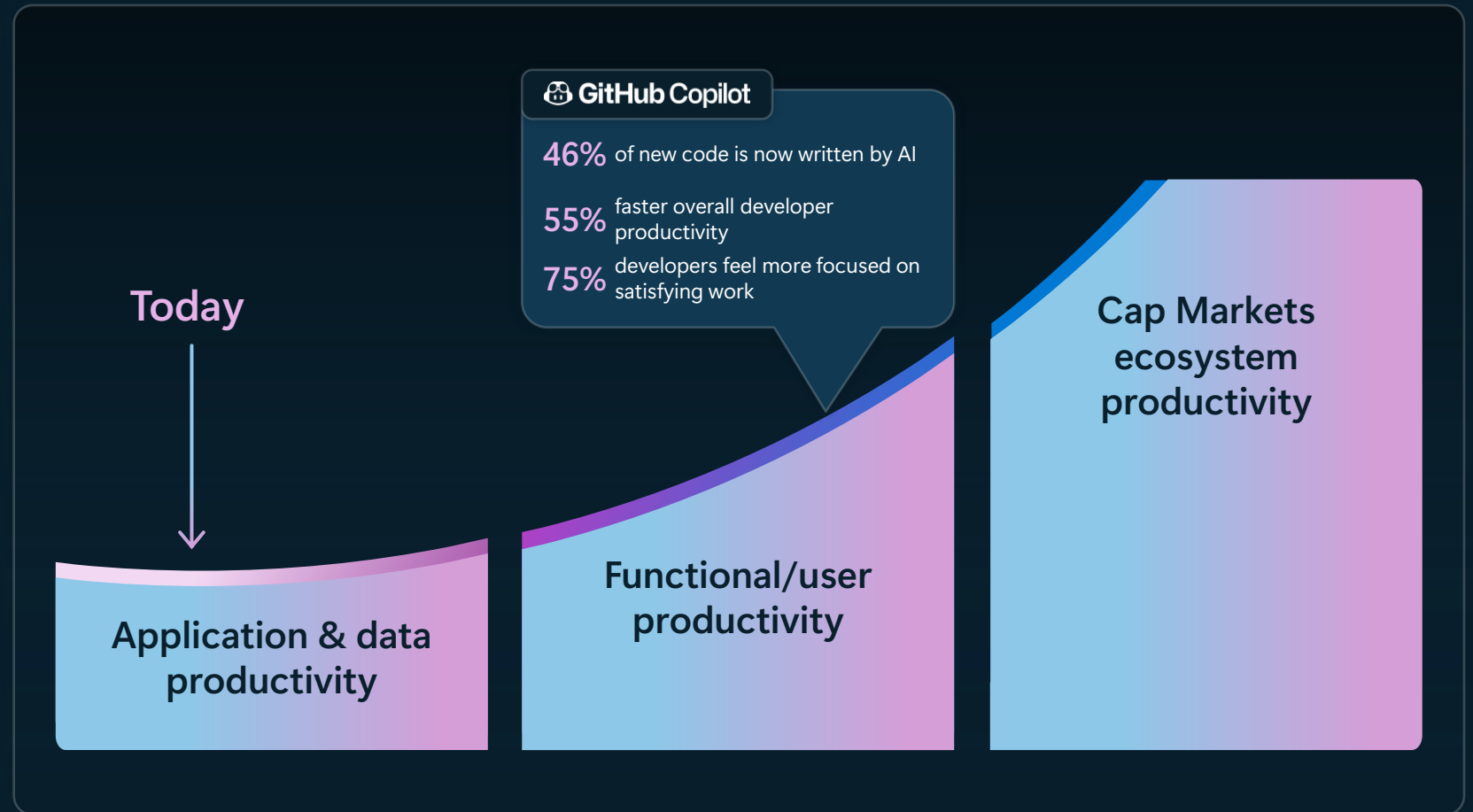
Empowering platforms, ecosystems, and distributed hubs

Microsoft's platform & partnerships maximize the return on our customers' investments

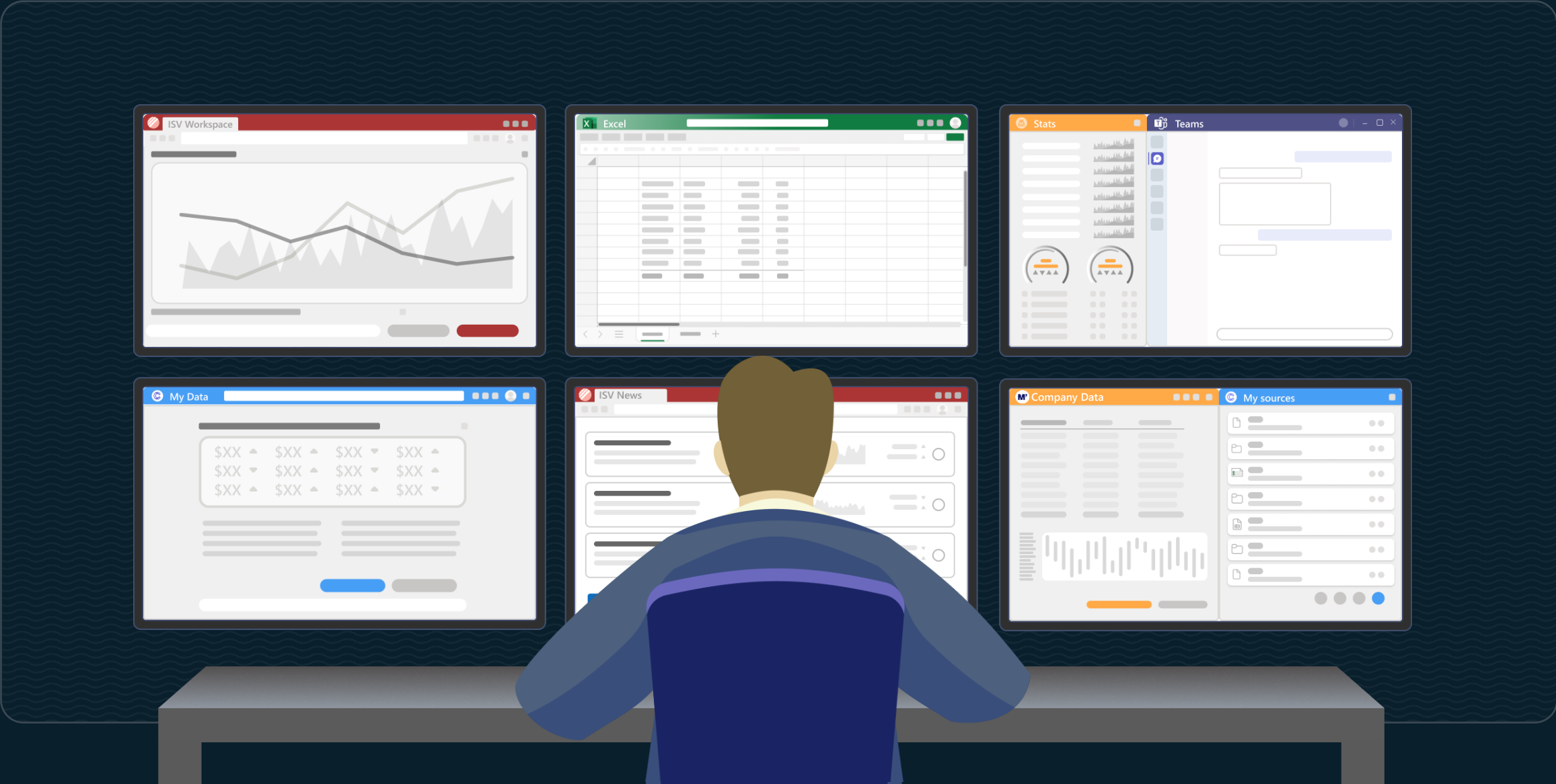


Vision: Transforming capital markets user productivity

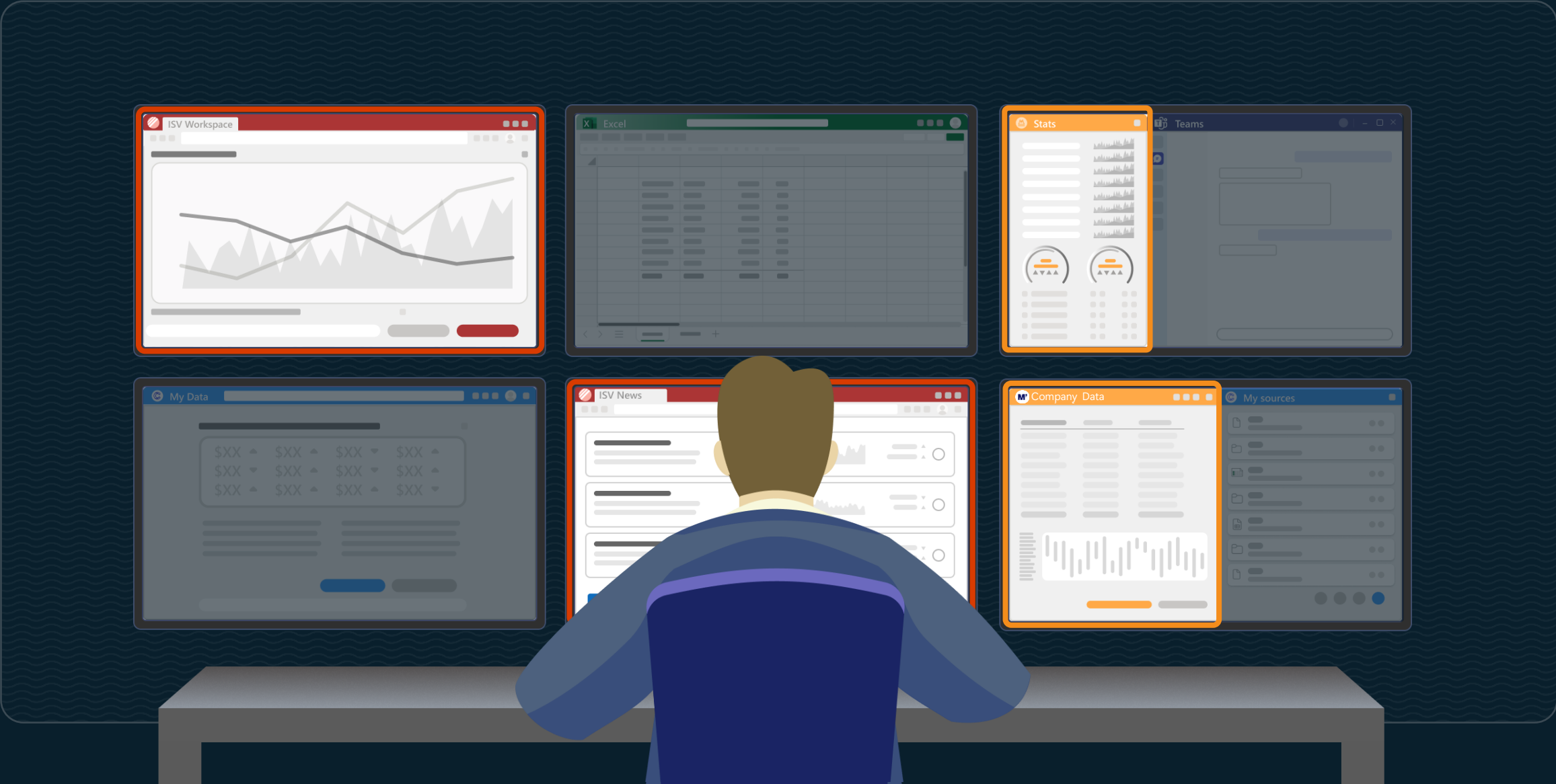
- > More time for customers
- > Reduce cost of information processing
- > Improved internal coordination & handoffs
- > Superior data-driven decisions & advise
- > Increase revenues per producer



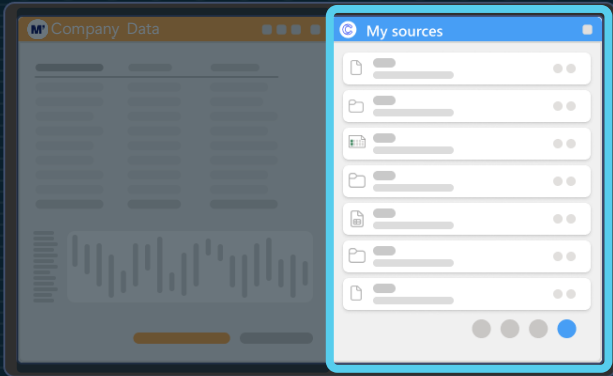
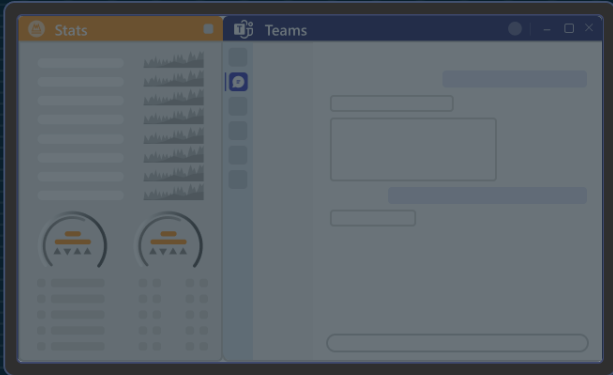
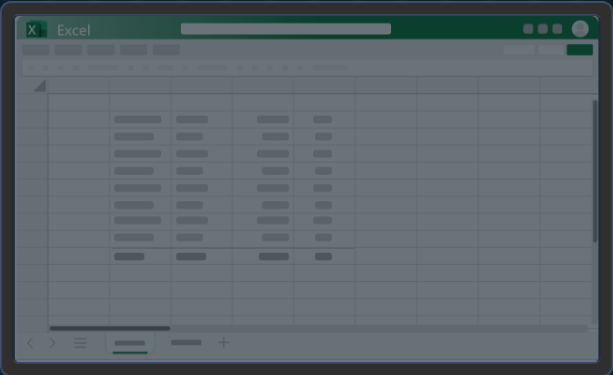
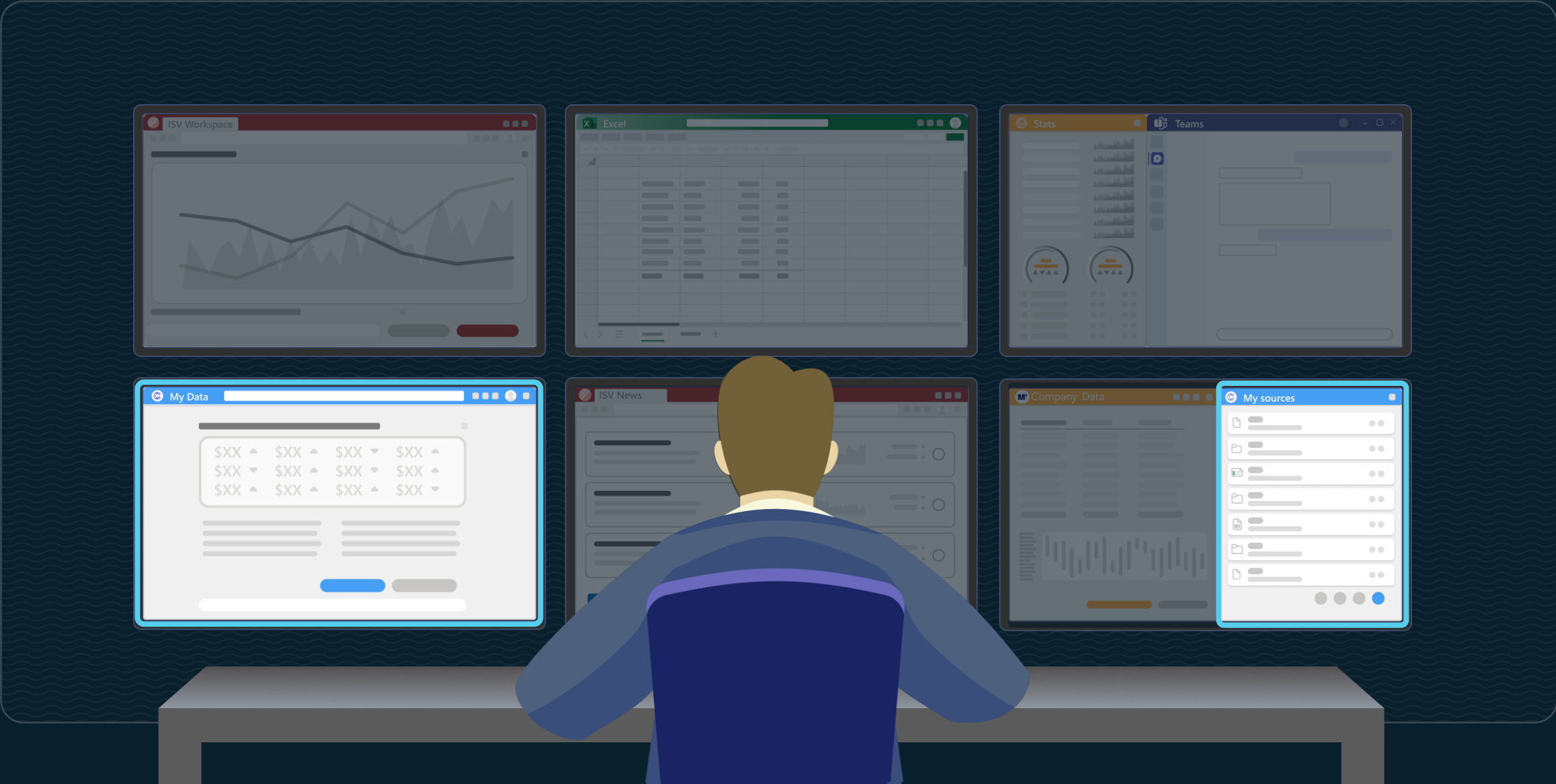
How a user gets to done...



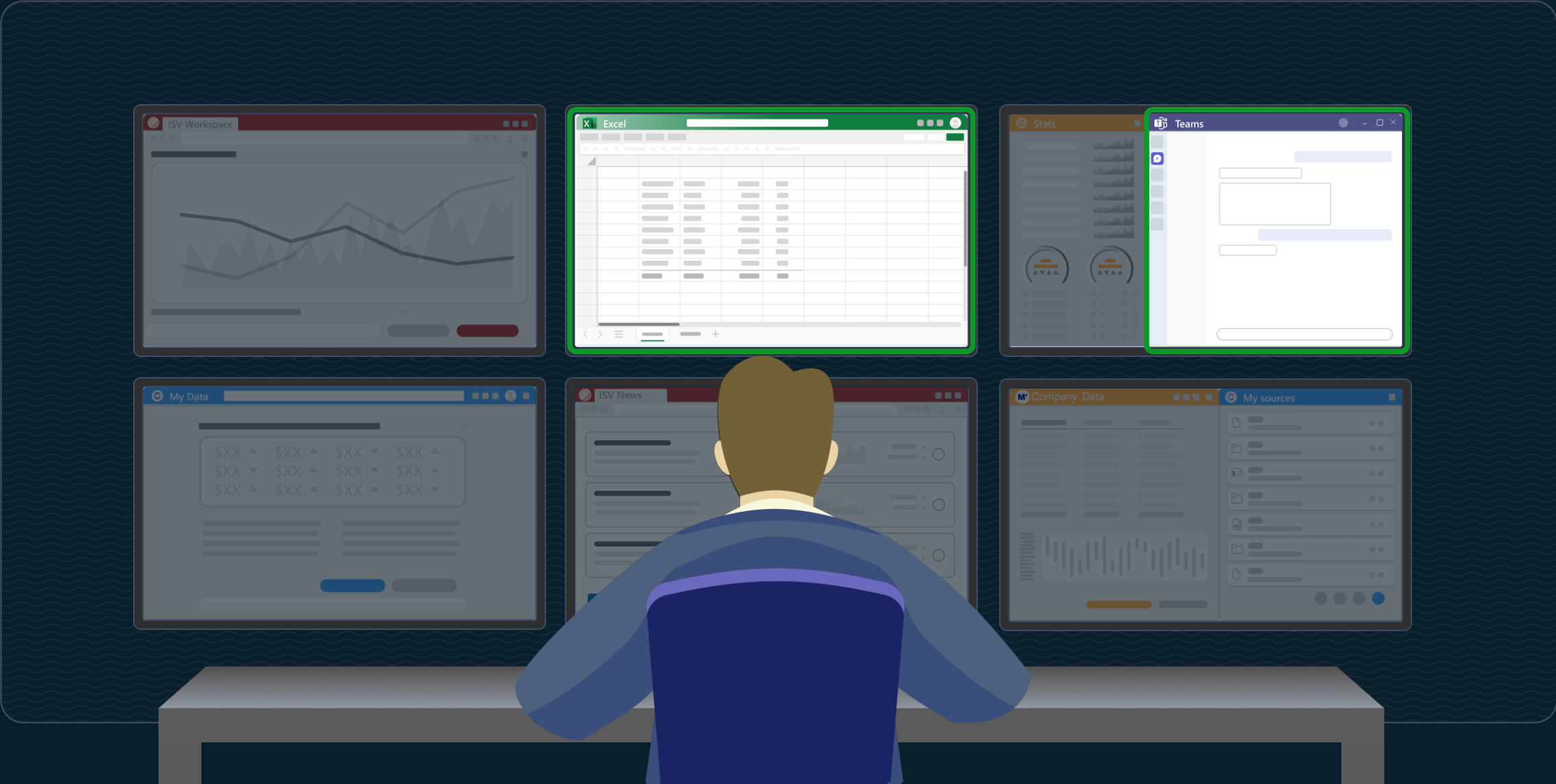
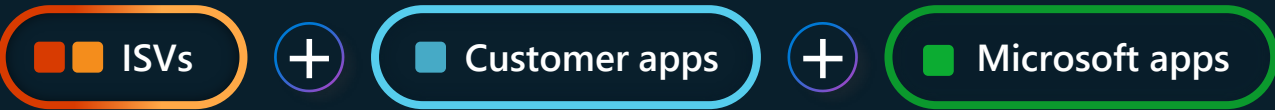
It takes an eco-system:



It takes an eco-system:



It takes an eco-system:



It takes an eco-system:

ISVs



Customer apps



Microsoft apps



DONE!



Let's see how things are evolving with Gen AI





Excel

An Excel spreadsheet window showing a grid of data. The grid contains several columns and rows of placeholder text and numbers, typical of a data analysis tool.

Stats Teams

Two windows are shown side-by-side. The "Stats" window on the left features a dashboard with multiple small bar charts and two circular gauges at the bottom. The "Teams" window on the right shows a chat interface with several message bubbles.

My Data

\$XX ▲	\$XX ▲	\$XX ▼	\$XX ▲
\$XX ▼	\$XX ▲	\$XX ▼	\$XX ▲
\$XX ▲	\$XX ▲	\$XX ▲	\$XX ▼

A window titled "My Data" displaying a table with three rows of data. Each row contains four values, each represented by "\$XX" followed by an upward or downward arrow. Below the table are several horizontal bars and a blue button.

ISV News

A window titled "ISV News" showing a news feed. It features three news items, each with a title, a small image, and a brief text snippet. The items are arranged vertically.

Company Data My sources

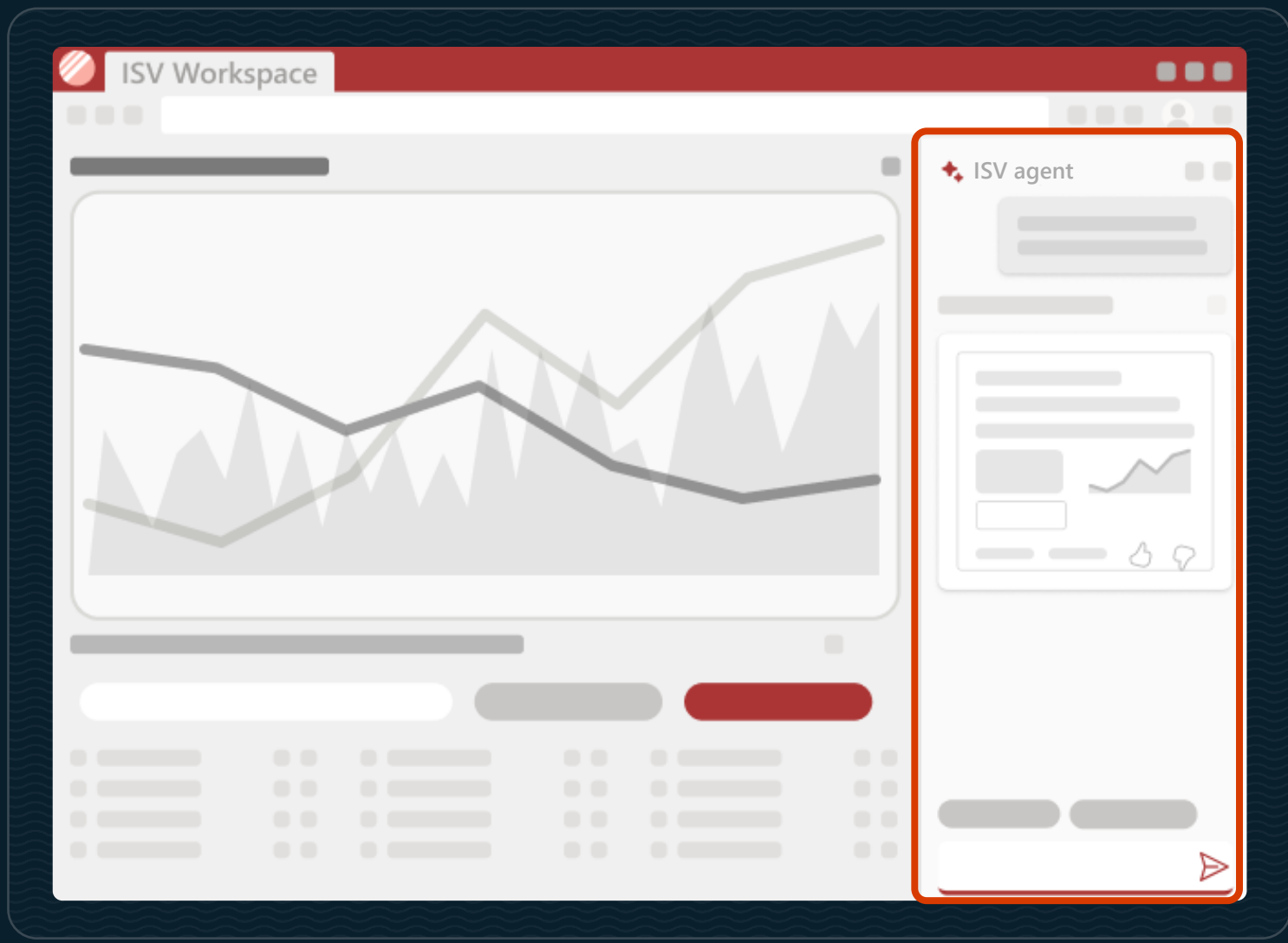
Two windows are shown side-by-side. The "Company Data" window on the left displays a table with multiple columns and rows of data, along with a bar chart at the bottom. The "My sources" window on the right shows a list of sources, each with a folder icon and a small circular indicator.



#1 Core App



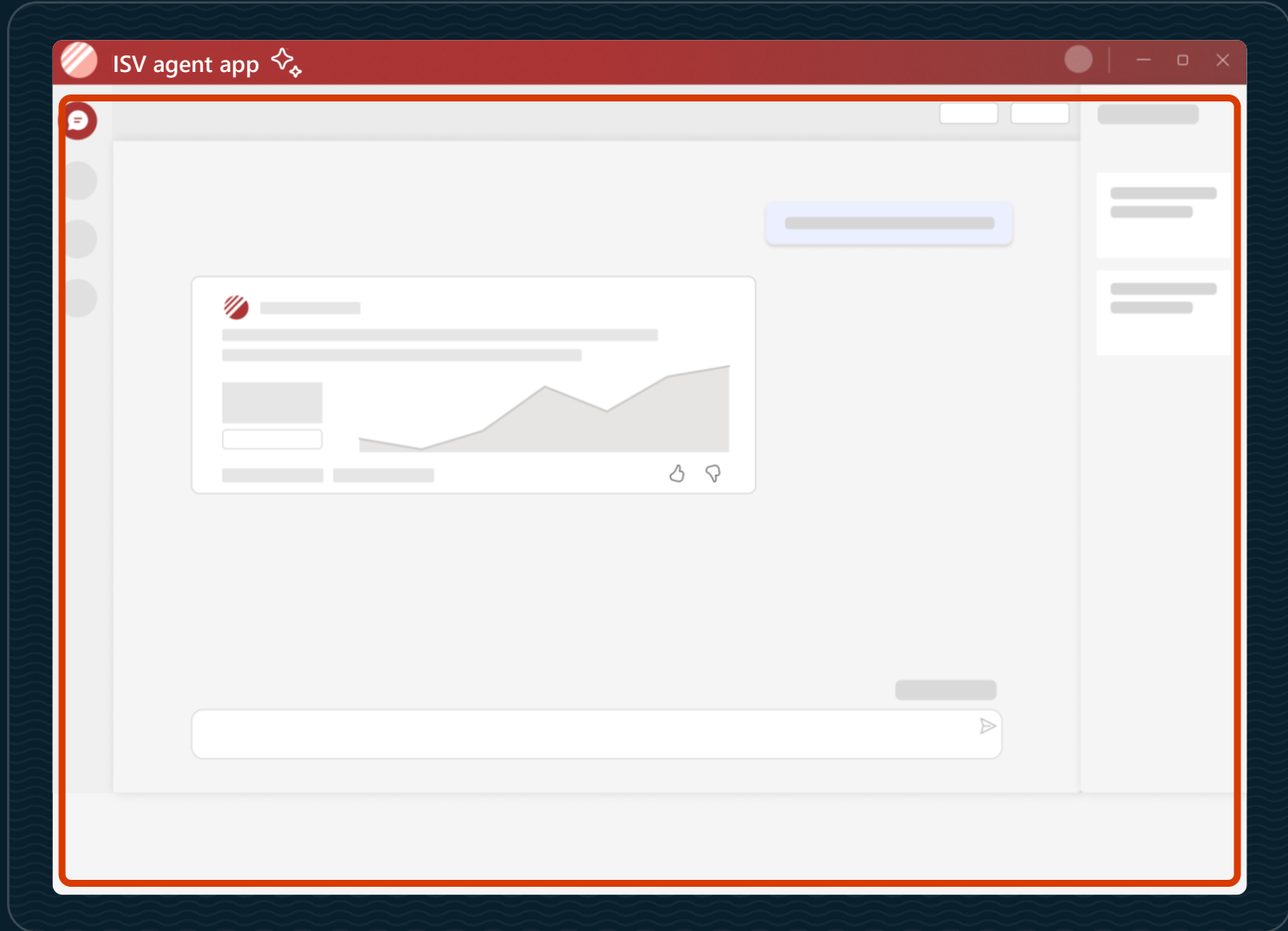
#2 Core App + Agent



Assistive Experience



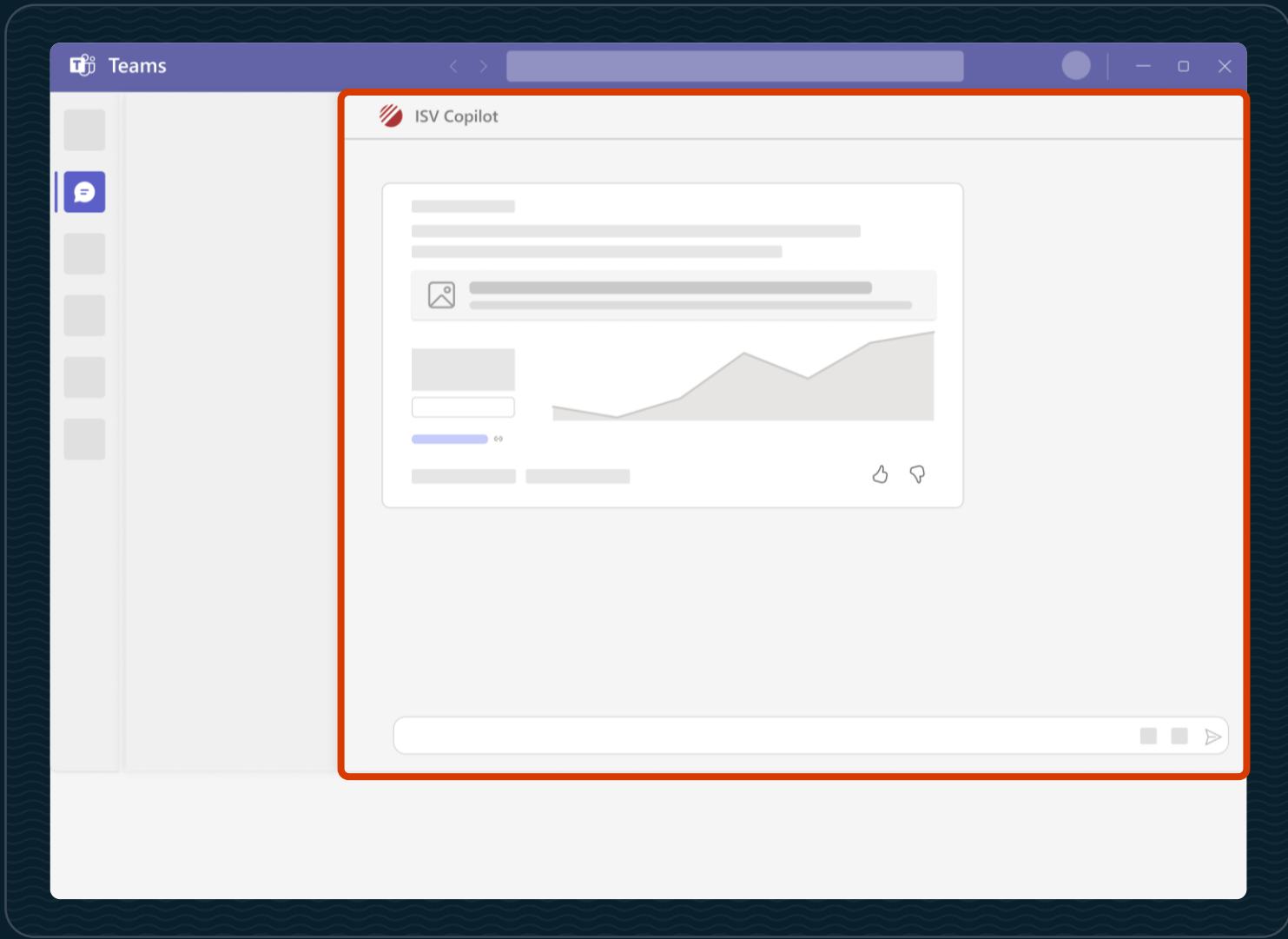
#3 Core App = Agent



Immersive Experience



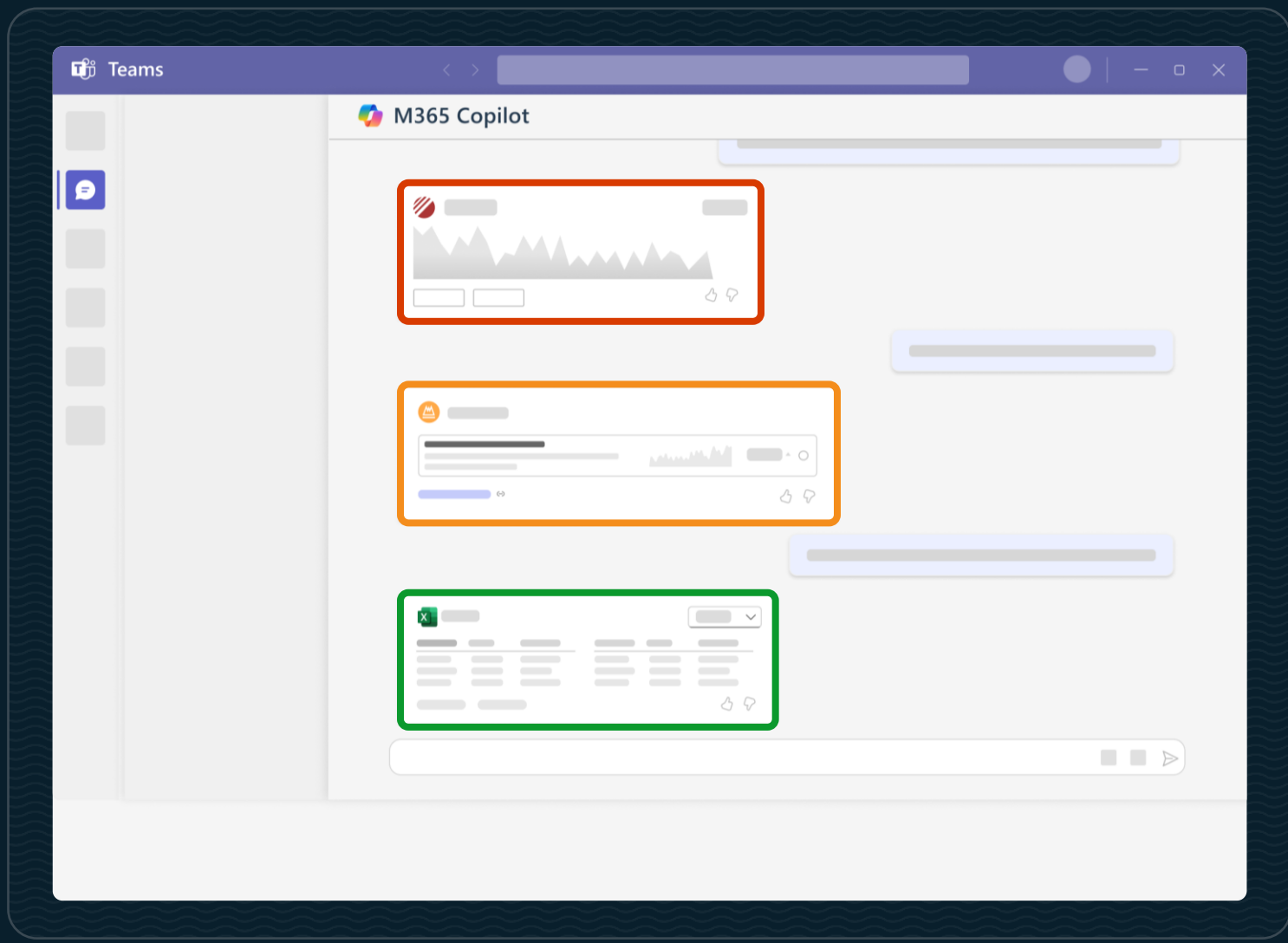
#4 ~~Core App~~ + Agent



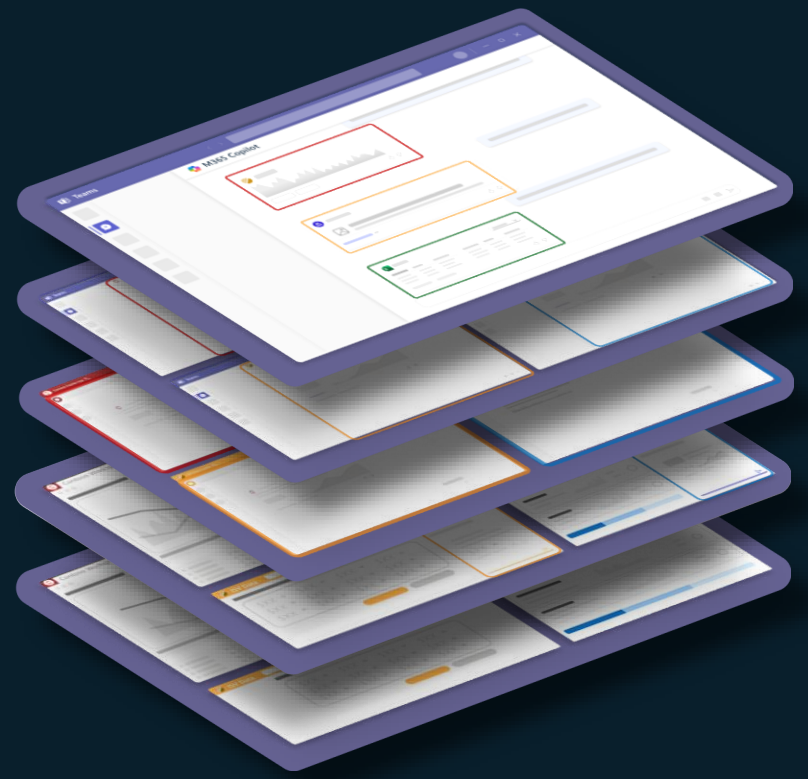
Simplified Experience



#5 ~~Core App~~ + Copilot + Agents

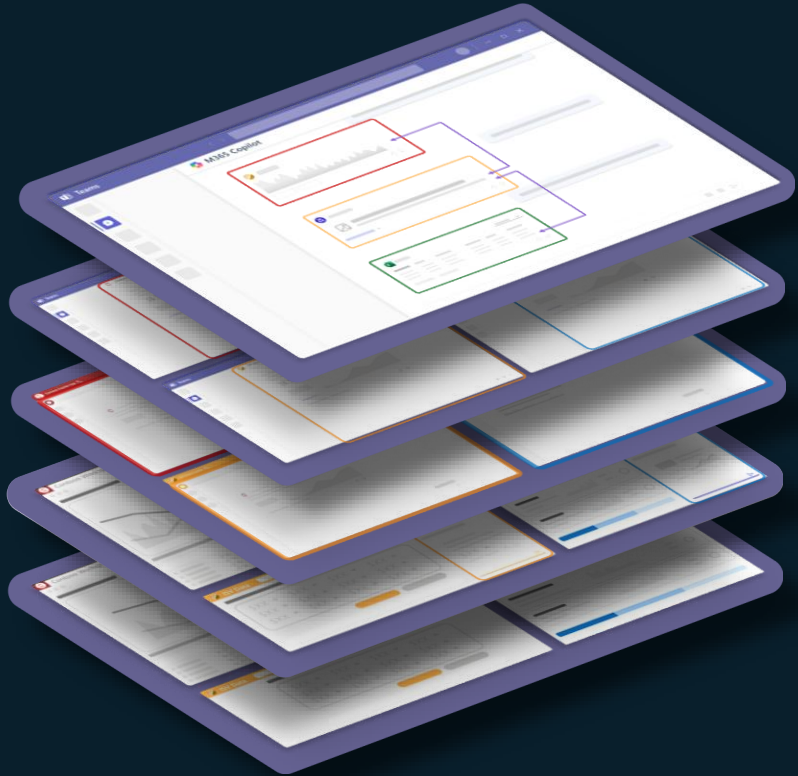
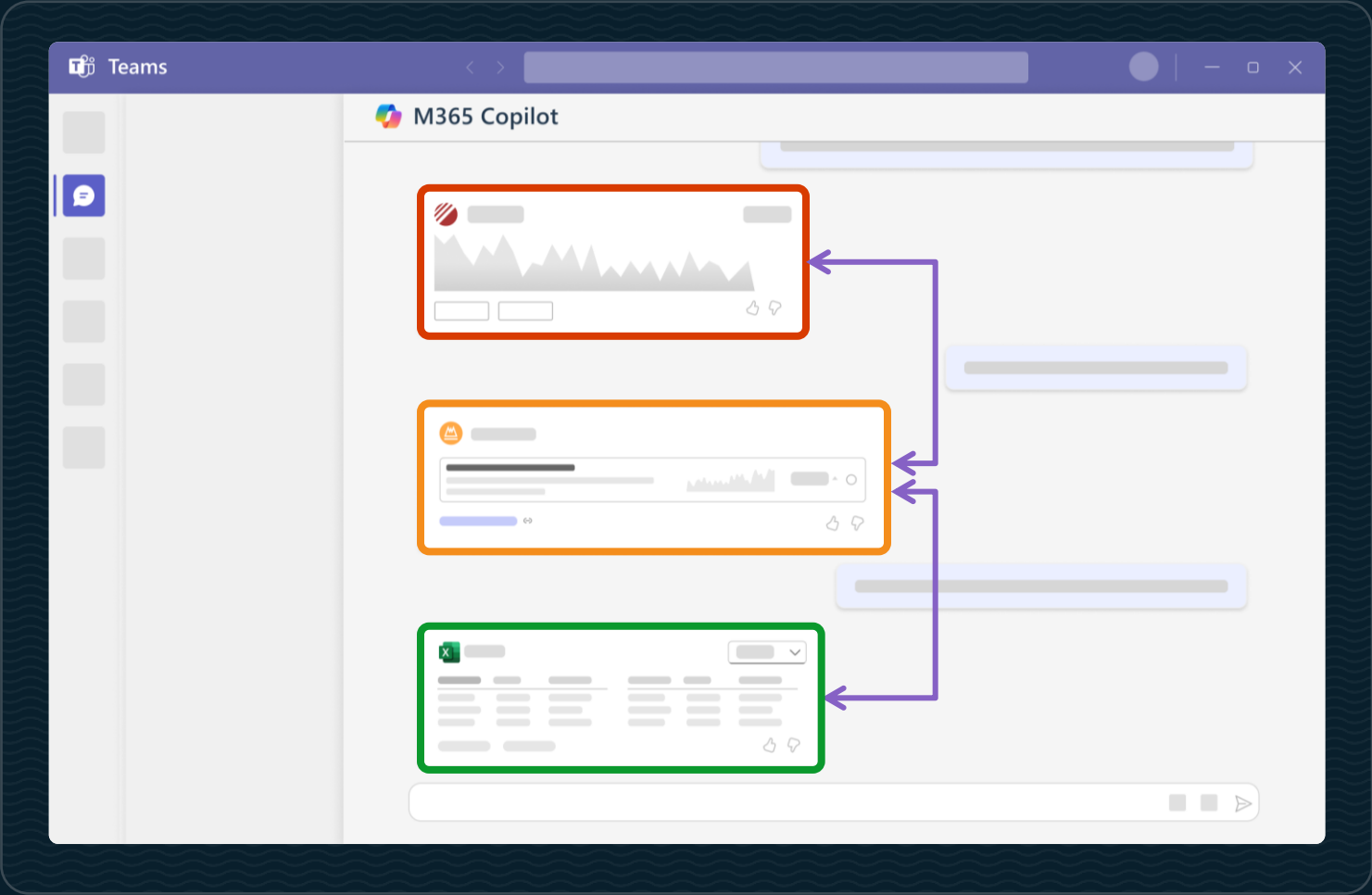


Unified Experience



#6

Core App + Copilot + Agents + InterOp



BlackRock

FACTSET

FINOS

FDC³

LSEG

Microsoft

MOODY'S

It's not an OR – It's an AND

Meet users
where they are



Collaborative

Users + Copilot
+ Agents



Focused

User -----> Agents



Meet users
where they are

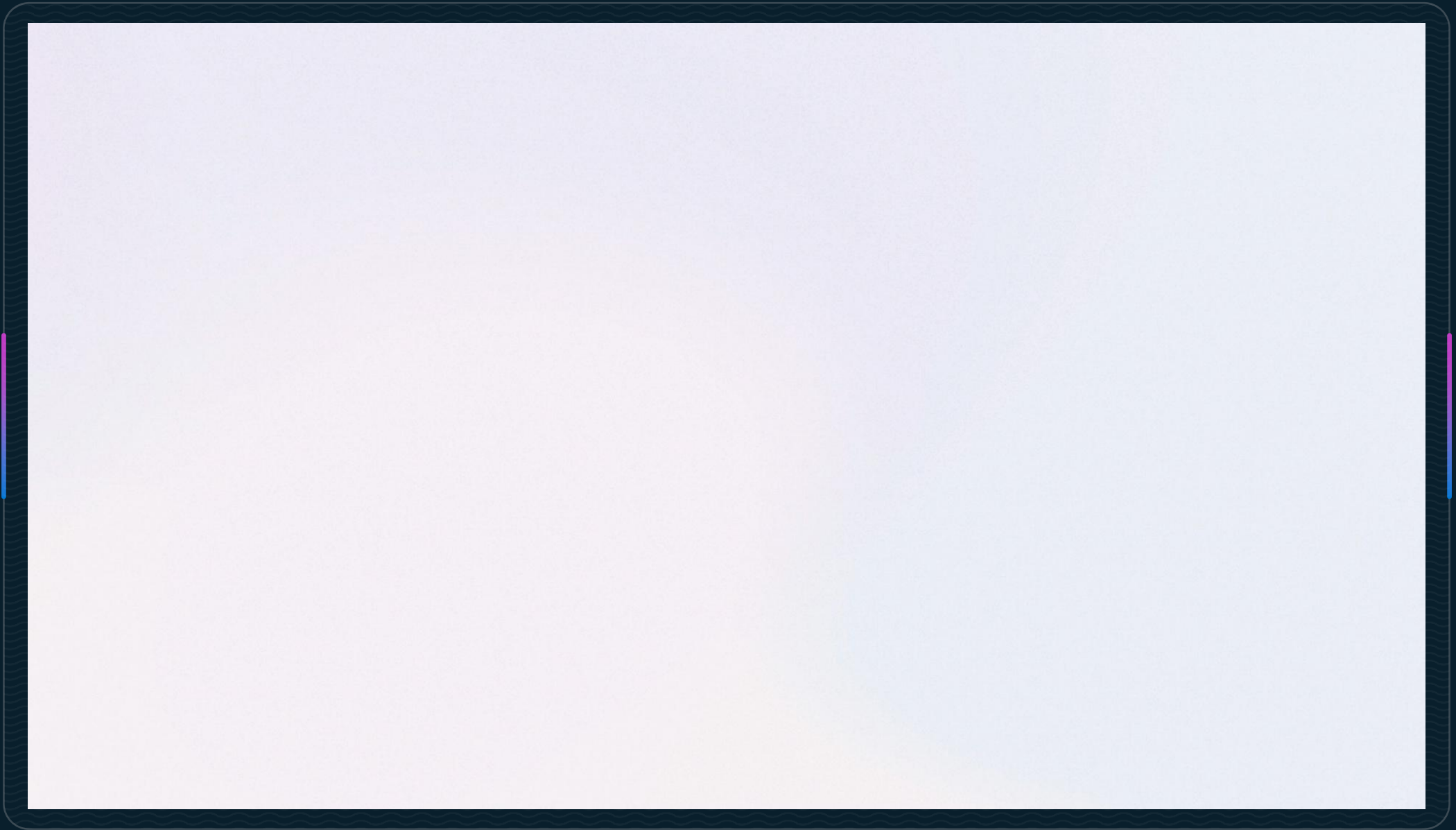


Copilot
Studio

= AND

And
create once





Copilot transforms how we work



+



+



Apps as UI



Copilot as UI

Workflows



Agents

Data



Knowledge

Questions?

