M A V E R I C K A I

CLAUDE'S FINANCE AGENTS

YOUR FREE WALL STREET ANALYST

Anthropic just launched 10 AI finance agents. Three of them give everyday investors the same tools Wall Street analysts charge thousands for.

The Market Researcher that monitors your entire portfolio

The Model Builder that creates full stock valuations in Excel

The Earnings Reviewer that breaks down every earnings call

How to set up all 10 agents in minutes

Copy-paste prompts for every workflow

2026 Edition

What Anthropic Just Launched

On May 5, 2026, Anthropic released 10 finance agent templates for Claude. These are not basic chatbot prompts. They are full agent systems with data connectors, sub-agents, and domain-specific skills that handle real financial workflows.

The agents connect to professional data sources like FactSet, S&P Global, Moody's, MSCI, and the London Stock Exchange Group. The same data Wall Street firms pay six figures a year to access. Claude can now pull from these sources, analyze the data, and deliver institutional-quality research to anyone.

All 10 Agents

Category	Agent	What It Does
Research	Market Researcher	Monitors sectors, synthesizes news, filings, and broker research
Research	Model Builder	Creates and maintains financial models from filings and data
Research	Earnings Reviewer	Analyzes earnings transcripts, updates models, flags thesis changes
Research	Pitch Builder	Creates target lists, comparable analysis, drafts pitchbooks
Research	Meeting Preparer	Builds client/counterparty briefs before calls
Operations	Valuation Reviewer	Reviews valuations against comparables and methodology
Operations	GL Reconciler	Reconciles general ledger accounts, performs NAV calculations
Operations	Month-End Closer	Manages month-end close workflows and task sequencing
Operations	Statement Auditor	Reviews financial statements for consistency and audit readiness
Operations	KYC Screener	Gathers entity files, reviews docs, prepares compliance escalations

Most of these are built for finance professionals. But three of them are incredibly useful for everyday investors who want to do their own research without paying for a Bloomberg terminal or a financial advisor. Those are the ones we are going to set up.

IMPORTANT

This guide is for educational purposes only. Nothing here is financial advice. Always do your own research and consult a qualified financial advisor before making investment decisions.

How to Set Up the Finance Agents

There are two parts to this setup. First you install the Finance plugin, which gives you all 10 finance skills. Then you add the three agent marketplaces from GitHub, which gives you the full Market Researcher, Model Builder, and Earnings Reviewer agents. Takes about five minutes.

STEP 1: Go to Customize

Open Claude (either claude.ai or the Cowork desktop app). On the left sidebar, click **Customize**. You need a paid plan (Pro, Max, Team, or Enterprise) for plugins.

STEP 2: Install the Finance Plugin

Under **Personal Plugins**, hit the **+** button. Then click **Browse Plugins**. Scroll through the list or search until you see **Finance**. Add it. This installs all 10 finance skills (reconciliation, variance analysis, journal entries, financial statements, and more).

STEP 3: Add the Agent Marketplaces from GitHub

Now go back to Personal Plugins and hit the **+** button again. This time, click **Create Plugin**, then choose **Add Marketplace**. Select **Add from a repository**. Paste in the GitHub link for the first agent.

Here are the three repository links you need:

GITHUB REPOSITORY LINKS

```
# Market Researcher
github.com/anthropics/financial-services/market-researcher

# Model Builder
github.com/anthropics/financial-services/model-builder

# Earnings Reviewer
github.com/anthropics/financial-services/earnings-reviewer
```

STEP 4: Repeat for All Three Agents

You need to do Step 3 three times, once for each agent. Each time: hit the **+** on Personal Plugins, click **Create Plugin**, choose **Add Marketplace**, select **Add from a repository**, and paste the next link. After all three are added, you will have the full finance agent suite installed.

STEP 5: Start Using the Agents

Open any conversation in Claude and just describe what you want. Claude will automatically use the right finance agent based on your request. You can also call specific agents by name. Try pasting your portfolio and asking for a full briefing.

TIP

The finance agents are fully open source on GitHub at **github.com/anthropics/financial-services**. You can inspect how they work, customize them, or deploy them through the API if you want to build your own tools.

WORKS IN THREE PLACES

The finance agents work in **Claude.ai** (web), **Cowork** (desktop app), and **Claude Code** (command line). Same agents, same capabilities, pick whichever you prefer.

01

The Market Researcher

Your personal analyst covering every stock you own

This is the agent I use the most. You paste in the stocks you hold and Claude pulls every news story, every analyst rating, every SEC filing, every major announcement, all automatically. It is like having a research analyst who covers your entire portfolio and never sleeps.

What It Does

The Market Researcher monitors sectors and synthesizes information from news outlets, company filings, broker research, and market data. It does not just dump links at you. It reads everything, identifies what matters, and tells you what changed and why.

Capability	What You Get
News Monitoring	Every relevant story about your stocks, filtered for what actually matters
Analyst Ratings	Upgrades, downgrades, price target changes, and the reasoning behind them
SEC Filings	10-K, 10-Q, 8-K filings parsed and summarized in plain English
Sector Trends	Industry-wide developments that affect your holdings
Competitive Intel	What competitors are doing and how it impacts your stocks
Risk Alerts	Regulatory changes, lawsuits, management departures, and red flags

Prompts to Try

PORTFOLIO BRIEFING

```
I own shares in AAPL, NVDA, MSFT, GOOGL, and AMZN.
Give me a full briefing on all five stocks. What
happened this week? Any analyst rating changes? Any
news I should know about? Flag anything that changes
the investment thesis for any of these positions.
```

DEEP DIVE ON ONE STOCK

```
Give me a complete research report on Tesla (TSLA).
Cover: recent earnings, analyst consensus, key risks,
competitive position, upcoming catalysts, and whether
the current valuation makes sense based on growth.
```

SECTOR SCAN

```
I am interested in investing in the AI chip sector.
Give me an overview of the key players, market share,
revenue growth, and which companies are best positioned
for the next 2-3 years. Include NVDA, AMD, INTC, AVGO,
and any others I should be watching.
```

WEEKLY WATCHLIST

```
Here is my watchlist: PLTR, SNOW, CRWD, NET, DDOG.
Rank them by investment attractiveness right now.
For each one, give me: current price context, recent
developments, analyst sentiment, and the one thing I
should be watching most closely.
```

TIP

Ask Claude to give you a weekly briefing every Monday morning. You can set this up as a recurring task. Paste your portfolio once and Claude will monitor it for you.

02

The Model Builder

Full financial models that analysts charge thousands to create

This is the one that blew my mind. You give Claude any stock and it builds you a complete financial model in Excel. Revenue projections, expense forecasts, DCF valuation, sensitivity analysis, the whole thing. Investment banks charge clients thousands of dollars for models like this.

What It Does

The Model Builder pulls data from SEC filings and financial databases, then constructs a proper financial model with linked statements, assumptions you can adjust, and valuation outputs. It exports the finished model as an Excel file you can download and keep.

Model Component	What Is Included
Income Statement	Historical actuals + projected revenue, margins, and earnings
Balance Sheet	Assets, liabilities, equity, and working capital projections
Cash Flow Statement	Operating, investing, and financing cash flows
DCF Valuation	Discounted cash flow model with terminal value and implied share price
Comparable Analysis	Trading multiples vs peers (P/E, EV/EBITDA, P/S)
Sensitivity Tables	What the stock is worth under different growth and margin scenarios
Assumptions Page	Every assumption in one place so you can adjust and play with scenarios

Prompts to Try

BUILD A FULL MODEL

```
Build me a complete financial model for Apple (AAPL)
in Excel. Include 3 years of historical data and 5
years of projections. I want a DCF valuation, comp
table, and sensitivity analysis. Export it as an .xlsx
file I can download.
```

VALUATION ONLY

```
What is Nvidia (NVDA) worth? Build me a DCF model
using current analyst estimates for revenue growth
and margins. Show me the implied share price under
bull, base, and bear cases.
```

COMPARE TWO STOCKS

```
I am deciding between CrowdStrike (CRWD) and Palo
Alto Networks (PANW). Build me a side-by-side model
comparing revenue growth, margins, valuation multiples,
and implied upside for both. Which one is cheaper
relative to its growth?
```

SCENARIO ANALYSIS

```
I own Amazon (AMZN). Build me a model that shows what
happens to the stock price if: (a) AWS growth slows to
15%, (b) AWS growth stays at 25%, (c) AWS growth
accelerates to 35%. Hold everything else constant.
```

IMPORTANT

Financial models are only as good as their assumptions. Claude builds the model, but you should always review the assumptions and adjust them based on your own research. Do not blindly trust any model output, whether it comes from AI or a human analyst.

03

The Earnings Reviewer

Know exactly what management said and whether your thesis still holds

Earnings calls are where companies tell you what is actually happening. But they are long, full of corporate language, and most investors do not have time to listen to 20 calls a quarter. The Earnings Reviewer reads the full transcript and tells you exactly what matters.

What It Does

The Earnings Reviewer analyzes earnings call transcripts and SEC filings. It does not just summarize. It identifies what management actually said versus what they avoided, flags changes in tone or guidance, and evaluates whether your original reason for holding the stock is still intact.

Feature	What You Get
Transcript Analysis	Full breakdown of what management said, organized by topic
Guidance Changes	Did they raise, lower, or maintain guidance? By how much?
Tone Shifts	Is management more or less confident than last quarter?
Key Metrics	Revenue, EPS, margins, and how they compare to estimates
Red Flags	Vague answers, dodged questions, unusual language patterns
Thesis Check	Does your original reason for owning this stock still hold up?

Prompts to Try

REVIEW AN EARNINGS CALL

```
Review the most recent earnings call for Microsoft
(MSFT). Break down: what were the key numbers vs
expectations, what did management say about AI revenue,
what changed in their guidance, and should I be
concerned about anything?
```

THESIS CHECK

```
I own Nvidia (NVDA) because I believe AI infrastructure
spending will continue to grow for at least 3 more
years. Review their latest earnings call and tell me:
does management's commentary support or undermine
this thesis? Be specific.
```

COMPARE EARNINGS ACROSS QUARTERS

```
Pull the last 4 earnings calls for Meta (META).
How has management's tone changed over the past year?
Are they getting more or less confident about their
AI investments? Is ad revenue re-accelerating?
```

EARNINGS SEASON BATCH

```
This week, AAPL, AMZN, GOOGL, and META all reported
earnings. Give me a summary of each one. Which beat
expectations? Which missed? Which had the most
concerning guidance? Rank them from most bullish to
most bearish based on earnings quality.
```

TIP

The Earnings Reviewer works best when you tell it your thesis first. Instead of just saying "review this earnings call," say "I own this stock because of X. Does this earnings call support or undermine that?" The analysis gets much more targeted and useful.

Power User Workflows

The real value comes when you chain these agents together. Here are some workflows I use regularly that combine multiple agents in a single conversation.

Full Stock Due Diligence

COMPLETE DUE DILIGENCE

```
I am considering buying shares of Palantir (PLTR).
Run a full due diligence:
1. Market research: news, analyst ratings, competitive
position, key risks
2. Financial model: build a DCF with bull/base/bear
cases and export to Excel
3. Earnings review: analyze the most recent earnings
call for tone, guidance, and red flags
Give me a final buy/hold/avoid recommendation based
on all three analyses.
```

Portfolio Rebalance Check

REBALANCE ANALYSIS

```
Here is my current portfolio:
- 30% AAPL, 25% NVDA, 20% MSFT, 15% GOOGL, 10% AMZN
Run market research on all five positions. Flag any
that have deteriorated since I bought them. Then build
a model for the two weakest positions and tell me
whether I should reduce my allocation.
```

Pre-Earnings Preparation

EARNINGS PREP

```
NVDA reports earnings next week. Help me prepare:
1. What are consensus estimates for revenue and EPS?
2. What are the three things to watch most closely?
3. Build me a quick model showing what the stock is
worth at different revenue growth scenarios.
4. What did management guide for this quarter on the
```

```
last earnings call?
```

Find New Investment Ideas

STOCK SCREENING

```
Find me 5 stocks I am probably not looking at that
meet these criteria: market cap $5B-$50B, revenue
growth above 25%, improving margins, and a strong
competitive moat. For each one, give me a quick
overview of why it is interesting and what the risks
are. Avoid the obvious mega-caps.
```

The Other 7 Agents

The three agents above are the ones most useful for individual investors. But the finance plugin includes 7 more agents designed for finance professionals. Here is a quick overview of what each one does in case you find them useful.

Pitch Builder

Creates investment pitchbooks with target lists, comparable company analysis, and presentation-ready slides. Useful if you are in investment banking, private equity, or any role where you need to pitch investment ideas to a team or clients.

Meeting Preparer

Builds comprehensive briefs before client meetings, board meetings, or investor calls. Pulls relevant data, recent developments, and talking points so you walk in fully prepared.

Valuation Reviewer

Reviews completed valuations against comparable companies and accepted methodology. Checks whether a DCF, LBO, or comp analysis was done correctly and flags any issues with the assumptions or approach.

General Ledger Reconciler

Reconciles GL accounts against subledgers, bank statements, and third-party data. Also handles NAV calculations for fund accounting. This one is for accountants and back-office teams.

Month-End Closer

Manages the entire month-end close process with task sequencing, dependencies, and status tracking. Coordinates who needs to do what and by when to close the books on time.

Statement Auditor

Reviews financial statements for internal consistency, GAAP compliance, and audit readiness. Catches errors before your external auditors find them.

KYC Screener

Handles Know Your Customer checks for compliance teams. Gathers entity documentation, reviews it against regulatory requirements, and prepares escalation reports when something does not check out.

Data Sources and Partners

Part of what makes these agents so powerful is the data they can access. Anthropic partnered with some of the biggest names in financial data. Here are the connectors available through the finance plugin.

Provider	What They Provide
FactSet	Fundamentals, estimates, ownership data, global market data
S&P Global	Credit ratings, market intelligence, industry research
Moody's	Credit analysis, risk assessment, economic research
MSCI	ESG ratings, factor models, index data
London Stock Exchange Group	Real-time and historical market data
Dun & Bradstreet	Company data, business credit reports, compliance screening
Verisk	Insurance analytics, risk modeling, climate risk data
Financial Modeling Prep	Free financial data API, fundamentals, SEC filings
Third Bridge	Expert interviews, company research, industry analysis
Guidepoint	Expert network, primary research, sector intelligence

FREE VS PREMIUM DATA

Many of these data providers require their own subscriptions. The agents work with publicly available data by default (SEC filings, news, free financial APIs). If you have a FactSet or Bloomberg subscription, you can connect it for deeper data. Most individual investors will get plenty of value from the free data alone.

Tips for Getting the Best Results

1. Always state your investment thesis

"Analyze NVDA" is fine. "I own NVDA because I believe AI infrastructure spending will grow 30%+ for the next 3 years. Analyze whether this thesis still holds." is ten times better. The more context you give, the more targeted the analysis.

2. Ask for the bear case

Claude will default to a balanced analysis, but if you specifically ask for the bear case, it will dig harder for risks. "What is the strongest argument against owning this stock right now?" forces Claude to find the flaws.

3. Request Excel exports

The Model Builder can export full financial models as .xlsx files. Always ask for the Excel export so you can adjust assumptions yourself. A model you can play with is worth more than a static summary.

4. Batch your research

Instead of researching one stock at a time, paste your entire portfolio and ask for a full briefing. Claude will cover all positions and flag the ones that need attention. This saves time and makes sure nothing slips through the cracks.

5. Set up recurring checks

If you use Cowork, you can schedule weekly or daily research tasks. Set up a Monday morning portfolio briefing so you start every week knowing exactly where your positions stand.

6. Cross-check everything

AI is a research tool, not an oracle. Use it to speed up your process and surface information you might have missed, but always verify key claims against primary sources. Check the actual SEC filings. Read the actual earnings transcript. The agents surface the right information, but the investment decision is yours.

> **IMPORTANT**
>
> These agents are research tools, not financial advisors. They can analyze data, build models, and summarize earnings calls, but they cannot predict the future. Never invest based solely on AI output. Always do your own due diligence.

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