



AI Quarterly Pulse Survey

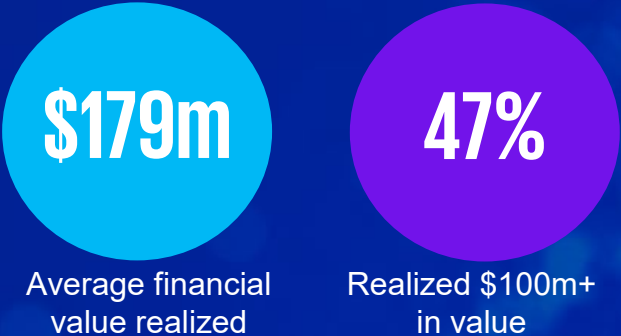
Asset Management & Private Equity Q3 2026

October 2026



Investment and strategy

Organizations are realizing meaningful financial value from AI investments.

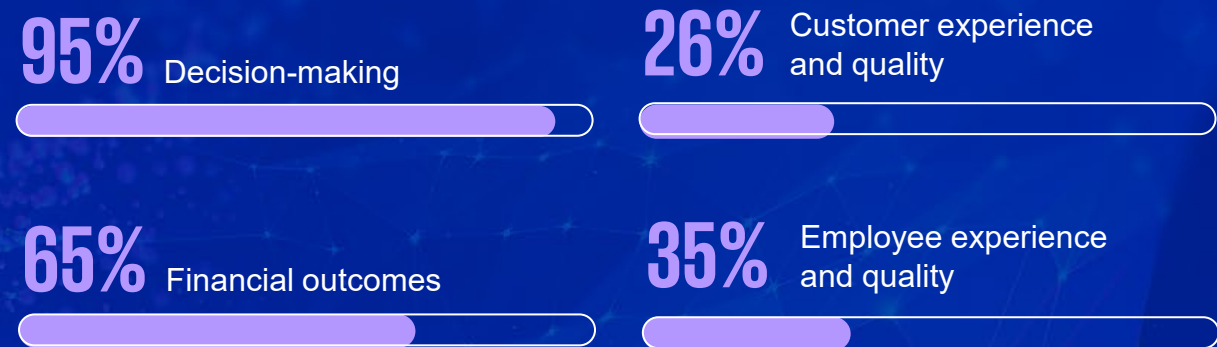


CEOs are actively owning AI as a strategic business priority, with clear accountability for AI-related outcomes across the organization:



More than 8 in 10 leaders (81%) report measurable business value from their AI initiatives.

In addition to productivity (95%), significant value is being reported across multiple dimensions:

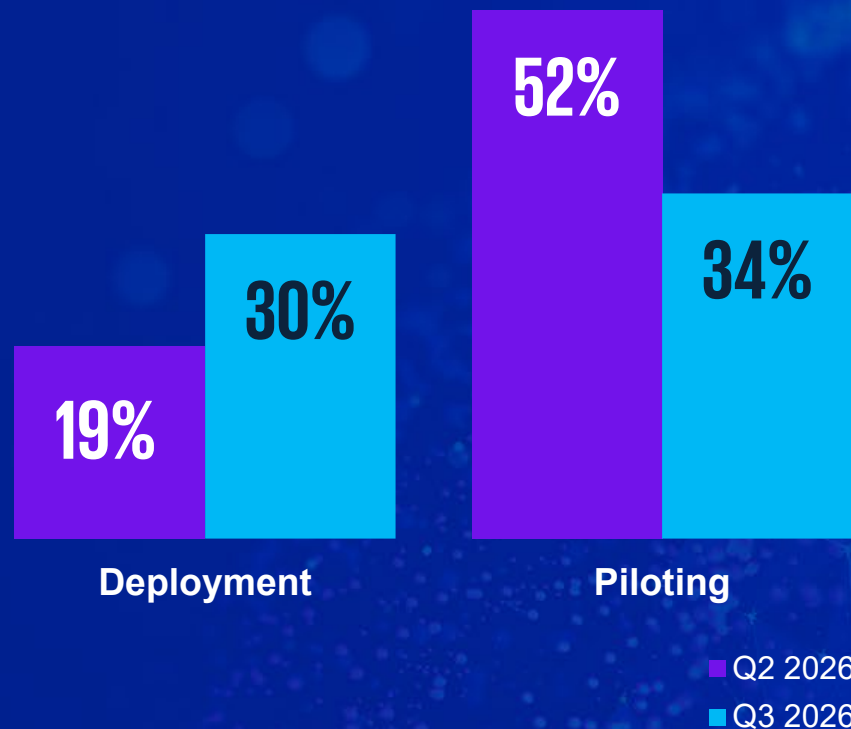


As AI moves deeper into day-to-day operations, organizations are also becoming more disciplined in how they manage AI usage.



AI agent deployment and trends

AI agents are increasingly moving out of the pilot phase and into the enterprise, but data readiness and access remains the top barrier to deployment, up 19 points from Q2.



AI agents are most deployed across risk, compliance, finance, and operations functions:

92%

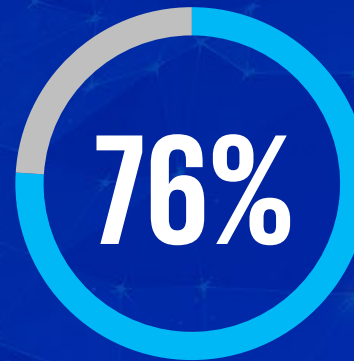
Risk, legal & compliance

89%

Finance

67%

Operations



Data readiness and access is the top barrier to AI agent deployment.

Workforce

Asset managers and private equity firms are preparing employees to work with AI agents by **expanding practical skills and integrating AI collaboration into existing roles and workflows.**

Nearly all asset managers and private equity firms are upskilling and reskilling their workforce to meet the needs of an AI-enabled workplace.

83%
in Q2

to 98%

80%

AI agents will prompt the integration of AI collaboration skills into existing workflows and therefore role requirements.

AI agents will prompt organizations to upskill employees currently in roles that will be displaced by AI agents.

71%

The share of organizations reporting significant workforce adoption of AI agents increased to

59%

up from

1%

in Q2

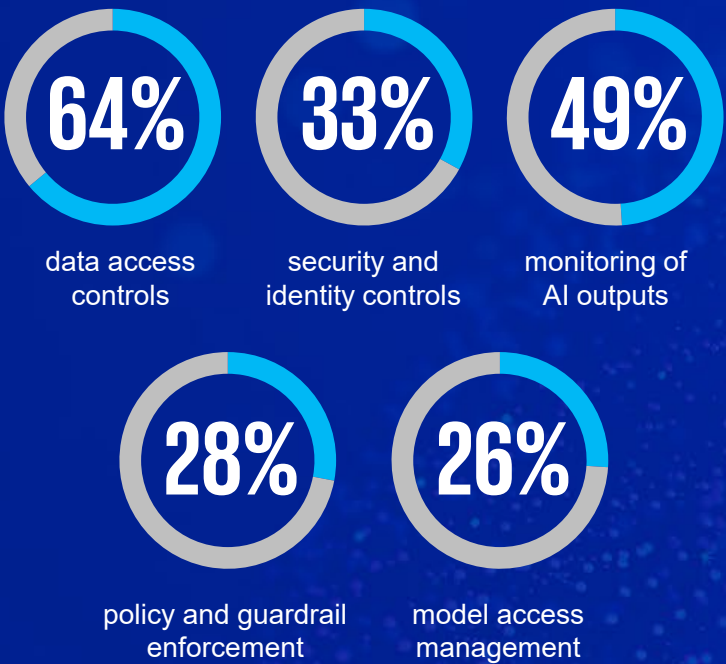
47%

of leaders say that those who make strong and effective use of AI are outperforming others, compared to 33% last quarter.

Governance and data

As AI agents scale, asset managers and private equity firms are strengthening data controls and oversight to help manage risk.

What's included in organizations' AI harness layer:



Accountability for AI-informed business decisions is concentrated among senior leadership.



55% agree their organization has the capabilities and governance to manage AI risks at scale, up from 41% last quarter.

Organizations are anticipating an increase in their data & analytics budgets in the next 12 months:



Three out of four organizations are not allowing AI agents access to sensitive data without human oversight, more than double last quarter.





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