

Build custom investment research agents in minutes. No code required.

Every institutional investment team wants AI inside its research workflow to stay ahead of the curve. Getting a platform to do exactly what your team needs has been the hard part. Until now, this meant a bespoke consulting engagement, a long specification process, and weeks of iteration before anything ran. Many valuable research processes never made that journey at all. They stayed locked inside an analyst's head, run by hand, impossible to scale.

What does the Orbit Agent Builder do?

Our Agent Builder removes that gap. It is a self service feature inside Orbit Insight that lets institutional investment teams create their own production grade research agents through a fully guided process.

Describe a workflow in plain language, or upload an existing methodology, and Orbit turns it into an agent that runs autonomously. This is the first feature that turns Orbit's clients into builders on the platform. It is the entry point into a broader multi-agent architecture designed to automate research end to end.

"Heavy work that used to take weeks of bespoke development now takes minutes to configure and runs autonomously thereafter."

At a glance

- Deploys based on your brief in minutes, then runs autonomously on whatever frequency you set
- Built two ways: plain language conversation or upload an existing methodology
- Every agent is an MCP endpoint, ready for Claude, ChatGPT Enterprise, Gemini and Copilot
- Draws on Orbit's Knowledge Bases, your internal data, or both
- Lives in the Agent Marketplace alongside Orbit's off-the-shelf agents

MCP-native by default

Every agent you build inside Orbit Insight automatically becomes an MCP endpoint, ready to connect from Claude, ChatGPT Enterprise, Copilot, Gemini, or your own internal LLM tools. Same agent, two distribution channels without the extra setup.

Built for the workflows that drive returns

ASSET MANAGERS

Standardize the analyst workflow. Track portfolio companies across earnings, filings, ESG metrics, themes, and events at scale.

EXAMPLE AGENTS

- Quarterly Portfolio Scorecard
- ESG Sustainability Assessment
- Sector Theme Digest
- Custom Stock Screen

HEDGE FUNDS & QUANTS

Operationalize the proprietary edge. Codify theses, extract structured signals from filings and transcripts, monitor niche themes.

EXAMPLE AGENTS

- Signal Extractor
- Healthcare Theme Monitor
- Earnings Expectation Analyzer
- Portfolio Scorecard

CORPORATE STRATEGY & IR

Monitor the competitive ground. Track peers, regulatory shifts, and sentiment with briefings produced at your team's cadence.

EXAMPLE AGENTS

- Peer Monitor
- Regulatory Digest
- Investor Sentiment Tracker
- Ongoing Sector Analysis



How any custom Orbit Agent is built

There are two ways to create an agent, and both take you to the same place: a configured agent ready to deploy. You can build through conversation, describing what you need in your own words while the system asks the right clarifying questions, proposes a structure, and walks you through review layer by layer before testing. Or you can upload a document: an existing methodology in any format, whether a fund research process, an ESG policy, a sector tracker template, or a spreadsheet, which Orbit reads to propose a baseline you can then refine.

Every agent has two layers

01 Structured data extraction

Your requirement becomes a configurable data extraction. Every field, source, and rule is visible. Review it, edit it, rerun it, and run it on whatever schedule you set.

02 Reports on top of the data

The second layer turns the structured dataset into reports. One agent, one dataset, any number of reports, each suited to a different audience, format, or frequency.

Pull from ANY data source

Each agent can pull from Orbit's Knowledge Base datasets, your connected internal data, or both. Choose the combination at build time, even at document type level, and change it whenever the workflow evolves.

Core Filings & Governance

Corporate Events

Earnings Intelligence

Sustainability & Policies

Regulatory Intelligence

Your Internal Data

Part of Orbit's multi-agent platform

Our Agents work as building blocks across three categories that compose into automated, end-to-end research workflows.

Capability Agents

A single, repeatable function or activity. The smallest unit of work.

Task Agents

A discrete research workflow. Broker research is one of the examples.

Role Agents

Orchestrates capability and task agents to play a defined role.



Orbit is an award winning investment research services platform designed to empower informed, end-to-end data-driven decision-making ahead of the curve. Orbit's extensive coverage, coupled with rigorous quality control measures, ensures access to reliable and timely information. Orbit facilitates automated workflows and comprehensive data analysis, streamlining research processes and uncovering critical insights. By committing to data integrity and clarity, Orbit enables users to confidently navigate complex financial landscapes and make strategic decisions with precision.

