

Octus MCP User Integration Guide

Using Octus MCP Connector

The Model Context Protocol (MCP) is an open standard that lets large language models connect securely to external data sources, tools, and APIs. The Octus MCP Connector brings the Octus platform — credit research, ratings analysis, dataroom, Fundamentals, and more — directly into your AI workflows without bespoke integrations.

What you get

Connect the Octus MCP Server™ to bring Octus' credit data and analytics straight into your AI workflows, unlocking direct access to Octus' editorial coverage and proprietary tools across:

- Octus's analyst-written intel, reports, and credit analysis
- Public and private covenant analysis
- Deal-term analytics across syndicated loans and private credit
- Company fundamentals, SEC filings, and earnings transcripts
- AI-summarized US court filings
- Your own data rooms and uploaded documents

This enables teams to work across one unified credit-research surface, streamlining workflows for:

- Credit analysis and underwriting
- Covenant review and liability-management exposure
- Litigation and bankruptcy monitoring
- Deal screening and comparison
- Research and compliance

Highlights

Remote MCP access

Connect over the Streamable HTTP protocol through a single URL endpoint.

LLM compatibility

Works with any LLM client that supports the MCP standard, including Claude Desktop, Claude.ai, and custom clients.

Entity-aware search

Search spans the Octus identifier graph so a single question can reach every relevant source.

Inline citations

Every answer ships with claim-level source links back to the underlying Octus document.

Suggested follow-ups

Each response surfaces follow-up questions to keep the analysis moving.

www.octus.com/mcp-connector

Available tools

Each tool searches one Octus content source. Your client picks the right tool from the user's question, or the user can route explicitly.

Tool	What it covers
Search Octus Intel	Octus's analyst-written articles across Covenants Analysis, Credit Intelligence, First Day Intelligence, Middle Market, Municipals, Private Company Analysis, Private Credit & Deal Origination and Structured Finance.
Search SEC Filings	SEC filings: 8-K, 10-K, 10-Q, and DEF 14A.
Search Transcripts	Earnings calls and other transcribed management events.
Search Court Filings	AI-summarized filings from US district courts.
Search Data Room	The user's accessible FinDox data rooms (analysis, earnings, transcripts, memos, legal docs).
Search Fundamentals Data	Both quantitative and qualitative fundamentals — financials (revenue, EBITDA, leverage, coverage, margins, multiples) alongside company-disclosed documents (earnings presentations, lender memoranda, capital-structure docs, press releases, sustainability reports, transcripts, compliance certificates).
Search Private Company Analysis	Octus's deep analysis on private companies across syndicated loans and high-yield bonds.
Search My Uploads	Documents the user has uploaded to CreditAI by Octus®.
Search Public Covenants	Covenant analysis over public credit agreements, indentures, OMs, and tear sheets.
Search Private Covenants	Covenant analysis over private-credit debt documents from the user's data rooms.
Search Deal Term Analytics	170+ deal-term data fields per instrument, benchmarked across Octus's global library.
List Available Tools	Lists every search tool with a flag for which ones your account can access, plus descriptions for client-side source picking.

Every tool call is checked against your Octus entitlements. If a source isn't included in your plan, or your account isn't enabled for the Octus MCP Connector™, you'll get a clear access message rather than a result. Use List Available Tools to see which sources your account can access.

Authentication

The Octus MCP Server uses OAuth 2.0 + PKCE (the MCP authorization standard). When configuring the server connection, your client redirects you to an Octus sign-in page where you enter your authorized credentials (username and password). Upon successful authentication, the user is then redirected to the provided redirect URL.

Getting started

- 1 Obtain Access**
Request credentials and endpoint URL from Octus.
- 2 Configure Your LLM**
Add Octus MCP Server URL to your LLM's configuration.
- 3 Use MCP Tools**
Call available MCP methods to query credit research, ratings, covenants, and deal-term data.

Claude.ai setup

- 1 Step 1: Manage Connectors**
Go to <https://claude.ai/settings/connectors> and click on "Organization connectors" on the top right to manage your Claude Connectors.
- 2 Step 2: Add Connectors**
Click on "Add custom connector" and add our remote Octus MCP Server details.
Please use <https://mcp.octus.com/mcp> as the server URL.
- 3 Step 3: Enable Octus MCP**
Go to New Chat in Claude and click Connect in the Search and Tools menu.
- 4 Step 4: Testing the connection**
Once you are back to Claude, you can verify that all tools are available and enabled and then begin interacting via the chat section.

When connecting to the Octus MCP Server, Claude will automatically redirect you to the Octus Login Page. Enter your registered email address and password on this authentication page. Upon successful login verification, you'll be redirected back to Claude.

Support

Internal support: contact your Octus account team.