



OCTUS MCP CONNECTOR™

Frequently asked questions

Getting started

What is the Octus MCP Connector?

Octus MCP Connector puts verified credit intelligence inside the AI tools you already use. MCP, the Model Context Protocol, is the open standard that makes this possible. It lets AI assistants query external data sources in real time without custom integrations. Once connected, you query Octus' full credit universe in plain language, directly from your AI assistant.

What does it take to get connected?

Under five minutes and no technical setup. Your AI tool's MCP settings will have an option to add a custom connector. Enter <https://mcp.octus.com/mcp> as the server URL and authenticate with your Octus credentials. See the platform-specific steps below for Claude, ChatGPT and Perplexity. No developer resource required. Contact your account team to confirm setup steps for your specific environment.

How do I connect from Claude, ChatGPT and Perplexity?

Claude: Go to Customize > Connectors, click "+" and select "Add custom connector." Enter a name (e.g., "Octus") and the server URL, <https://mcp.octus.com/mcp>, then click "Add" and authenticate with your Octus credentials. On Team or Enterprise plans, an Owner must add the connector at the organization level first (Organization settings > Connectors), after which members connect individually.

ChatGPT: Requires a Plus, Pro, Business, Enterprise or Edu plan with Developer Mode turned on. Go to Settings > Apps & Connectors > Advanced settings and enable Developer Mode, then create a new connector using the server URL above. On Business, Enterprise and Edu workspaces, a workspace admin must enable Developer Mode and publish the connector before individual members can use it.

Perplexity: Available on Pro, Max and Enterprise plans. Go to Account Settings > Connectors, click "+ Custom connector," select "Remote" and enter the server URL. Choose OAuth as the authentication method, accept the risk acknowledgement and click "Add," then authenticate with your Octus credentials. On Enterprise accounts, an admin must first enable "Allow members to add custom connectors," or add Octus as an organization-wide connector.

If none of these steps work, contact your IT team. Blocking individual users from adding custom MCP connectors is common IT practice at larger firms, including Octus, so your IT team may need to grant this permission before you can connect.

I don't see the option to add a connector in my AI tool. What should I do?

On most platforms, custom connectors are enabled by your organization's IT administrator rather than by individual users. If you don't see the option to add a connector, or the setting is greyed out, your organization most likely hasn't enabled custom or remote MCP connectors yet. Ask your IT team to allow custom connectors for your AI tool, and to add the Octus MCP Connector specifically if the platform requires admin-level setup. Once enabled, follow the steps above.

Which AI tools does the connector work with?

The Octus MCP Connector is fully LLM-agnostic. It works with any AI tool that supports MCP, including Claude, ChatGPT and others. Contact your account team to confirm compatibility with your environment.

What data can I access through the connector?

The connector routes queries across these Octus data streams, based on your entitlements:

Octus Intel: 55,000+ annual articles from expert financial reporters and legal analysts covering the full sub-investment grade credit universe

SEC filings: 8-K, 10-K, 10-Q and DEF 14A

Court filings: AI-summarized filings from US district courts

Transcripts: Earnings calls and other transcribed management events

FinDox™: 8M+ private documents directly from your accessible data rooms

Liquid & Private Credit Fundamentals: Financials, capital structures, documents and transcripts across 95%+ of the credit universe, including BSL, HY and direct lending

Private Company Analysis: Deep-dive research on private companies with syndicated loans and HY bonds

Public Covenants: Covenant analysis over BSL and HY credit agreements, indentures and OMs

Private Covenants: Covenant analysis over direct lending instruments from your data rooms

Deal Term Analytics by Octus@: 170+ standardized data fields per instrument, benchmarked across Octus' global library

My uploads: Documents you've uploaded to CreditAI

Sources are selected automatically based on your query. You can also specify sources in your prompt or adjust which are active through the MCP settings in supported LLMs.

Do I need an Octus subscription to use MCP?

Yes. The connector surfaces exactly the data your account is licensed for. Access is scoped exactly to your subscription.

Data and capabilities

Can I query across all data sources at once?

Yes. “Search Across All Sources” executes your query simultaneously across every Octus data stream you're entitled to, in a single call. It's useful when a question spans coverage areas or when you're not sure which source to hit first.

What happens if I ask about data I'm not licensed for?

The connector only surfaces what your account is subscribed to. If a source is missing, the first step is to review your subscription. Your account team can help.

Does the connector access my private documents?

Yes, if you've uploaded documents to CreditAI or have FinDox data room access, those are included under your permissioned entitlements. “Search My Uploads” queries documents you've added privately; “Search Data Room” covers third-party data rooms aggregated through FinDox.

How are citations and source references handled?

Every output includes direct source attribution, traced to the original source document, consistent with how CreditAI works on the platform. This supports compliance and audit workflows.

How it works

What is CreditAI by Octus® and how does it relate to MCP?

CreditAI by Octus® is the intelligence layer that powers the connector. It runs purpose-built agents for credit research, covenant analysis, benchmarking and financial modeling. When you submit a query through your AI assistant, CreditAI processes it against Octus' verified data and returns research-grade outputs with source citations. MCP is the delivery mechanism, and CreditAI is the engine.

How does the connector differ from CreditAI on the Octus platform?

Same underlying analysis, different access points. CreditAI on platform is a structured, browser-based interface. The MCP Connector lets you query the same intelligence mid-workflow, from inside your AI assistant, without navigating to the portal. Queries submitted through your LLM draw on Octus intelligence and data to generate answers. Responses may also incorporate information from outside the Octus ecosystem.

How does it differ from the Octus API?

These are complementary. The API is for programmatic, system-to-system data delivery: custom applications, BI tools, data pipelines and quant workflows. The MCP Connector is for interactive, conversational queries within an AI assistant. Many clients use both.

Security and data governance

Is my data secure?

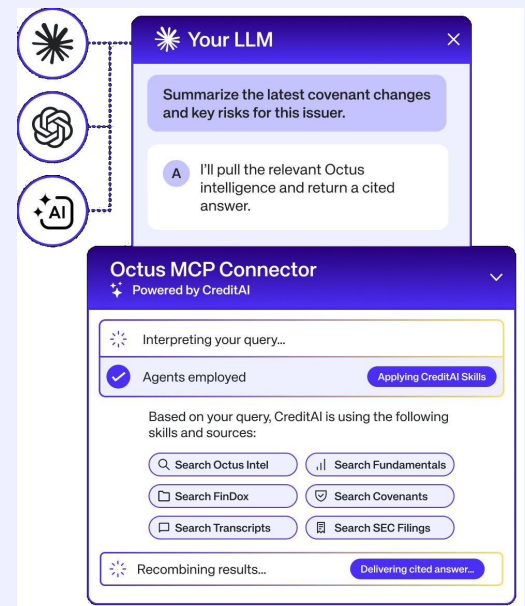
Yes. Octus MCP Connector uses the same authentication and data handling standards as the core platform.

Is my data used to train AI models?

No. Your queries and the data returned are not used to train any AI model. Same data governance policy as the core platform.

How is MNPI handled?

FinDox includes auditable MNPI exposure tracking. Access to private documents is permissioned, session-logged and consistent with Octus' established information barrier controls. Logs are available for compliance and audit review.



What should I ask the MCP?

Ask naturally. The connector interprets credit-specific language and maps your query to the right source. Some examples:

What proportion of the last 12 months of deals had Serta Protection (Supermajority Noteholder Consent Required for Lien Subordination)?

Analyze [company]'s credit agreement in FinDox and summarize any Restricted Payment basket changes compared to the January 2025 version.

Which deals have been downgraded in the past month? Which ones have already retained advisors?

What has been the impact of AI on software borrowers? How are management teams framing the situation?

Surface refi and covenant stress opportunities across Octus coverage.

What should I do if the connector isn't returning results?

First, check that your connector is active in your LLM settings. If the connector is active but not returning expected results, ask your LLM directly why Octus intelligence is not appearing in responses. If the issue persists, confirm your entitlements with your account team or contact directdata@octus.com.

Use cases by firm type

How do investment managers use the connector?

Portfolio surveillance and screening workflows benefit most. Query covenants, financials and research on public and private companies programmatically. Execute automated screening across the full sub-investment grade universe. Connect proprietary AI agents to Octus data for deeper, automated workflows.

How do leveraged finance and investment banking teams use it?

Query EBITDA reconciliations, covenant boundaries and private company updates without switching tools. Run deal benchmarking and automate credit memo generation at scale. Free analysts from manual data retrieval.

How do law firms use it?

Access historical debt packages and credit agreements in plain language. Surface market-standard precedents and scan deal structures against Octus' library to accelerate drafting and reduce execution risk.

How do advisory and restructuring teams use it?

Expose direct lending, public credit and bankruptcy data to your internal systems for situational modeling. Orchestrate restructuring analysis to surface distress signals. Connect Octus intelligence to your proprietary databases for business development and origination workflows.

Pricing and access

What does it cost?

The MCP Connector is available at an additional cost to your current Octus subscription. Contact your account manager for details.

I already use the Octus platform. Do I need this too?

They're different tools for different moments. The platform is your structured research environment. The connector extends that same intelligence into your AI assistant for faster, mid-workflow queries. You don't have to choose.

Where do I go to get started?

Visit octus.com/mcp-connector for the user integration guide, developer guide and setup instructions. Contact your Octus representative with any questions.

Get in touch

For technical support or data entitlement questions:

directdata@octus.com

For commercial inquiries:

[Contact your account manager](#)