

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

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.