

# TURN 50,000+ ROW VALUATIONS INTO CLEAR PORTFOLIO ANSWERS.



## Connect your AI to Molecule through a secure, read-only MCP server that returns structured results you can act on.

Compatible with MCP clients like Claude, ChatGPT, and Copilot

### Explain Portfolio Changes in Seconds

Ask what changed between two adjacent dates and get a structured explanation of the drivers behind your P&L and exposure. Instead of exporting and diffing valuation files, server-side aggregation reduces large datasets into bounded summaries your AI assistant can reason over, so you get to the answer quickly instead of working through raw data. Your AI assistant can also incorporate additional context when interpreting those results.

### Query Positions, P&L, and Marks Directly

Start with a simple question like “what changed in my portfolio today?” and refine from there by focusing on specific books, removing noise, or drilling into positions and P&L. Each question narrows the scope and the response adapts, so you can move through your portfolio step by step without exporting data or rebuilding reports first. For options positions, the response includes delta, gamma, strike, underlying price, and days to expiration, so your AI can reason over pin risk, near-term exposure, and greeks alongside the rest of your book — and as the conversation develops, surface patterns or potential issues across the full portfolio.

### Works at the Size of Your Portfolio

Large portfolio comparisons can produce tens of thousands of rows across hundreds of columns. The MCP Server handles that volume by returning structured results built for reasoning, so exposure shifts and P&L movement remain clear even as your portfolio grows.

### Connect AI to Your Data Safely

The MCP Server is strictly read-only at both the tool and API layers and cannot modify trades, marks, or positions. Every query is role-governed, rate-limited, and fully audited, with each call logged by user, account, tool, and parameters, so you maintain visibility and control. Data is isolated by account at the query layer, and the server is stateless, retaining no customer data between requests, so conversational access does not introduce trade booking, data modification, or automated actions. Molecule does not host or operate an LLM; your AI subscription and its governance policies remain entirely yours.

### Built to Evolve With Your Operation

The MCP Server is built directly on Molecule’s v2 API and follows a consistent tool pattern, so new conversational capabilities can be added as the platform evolves without replatforming or rebuilding. It operates as a deterministic tool layer, with no server-side LLM or hidden processing, so behavior remains predictable and auditable as your infrastructure evolves.