October 2026 (iteration 02)

LSEG Workspace

AI Search FAQ

LSEG DATA & ANALYTICS

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About this document

This document provides answers to frequently asked questions about LSEG Workspace AI Search, hereafter AI Search.

AI Search helps financial professionals quickly discover, analyse, and summarise information using natural-language, AI-powered search and chat. Instead of navigating multiple applications or manually reviewing large volumes of data, users can ask questions in plain English and get fast, clear, and actionable answers in one conversational experience.

AI Search brings together LSEG's proprietary data and analytics, across markets and asset classes, including news, research, filings and transcripts. Results are delivered as easy-to-understand summaries, tables, and charts, with transparent source citations, so users can trust and verify every answer. For the full list of supported content, see the What data is available? question.

AI Search supports on-demand questions, helping users stay informed, reduce manual work and focus on making better decisions – all within their existing Workspace experience.

📌 This is a living document and will be updated frequently to reflect changes in AI Search. Check back regularly for the latest information.

Intended readership

This document is intended for users of Workspace products who are:

- Using AI Search, or
- Interested in learning more about the AI capabilities we currently offer

Further information

To:

- Access other Workspace technical content, see the Workspace technical documentation site
- Provide feedback on Workspace technical content, contact DocFeedback@lseg.com

Getting started

This section features questions that may be asked when first encountering AI Search.

What makes AI Search different from other tools?

AI Search is purpose-built for financial professionals. Unlike generic AI tools, it is grounded in LSEG's trusted financial data and Reuters News, providing transparent, source-backed responses with citations that allow users to verify information and trace insights back to their origin. This enables users to act faster while maintaining confidence in the quality and source of the information.

Who can access AI Search?

AI Search is available to anyone with a valid Workspace licence.

It is not available:

- On Workspace Access, Workspace for Students, Workspace for Kiosk, and Workspace for Media
- For users in mainland China

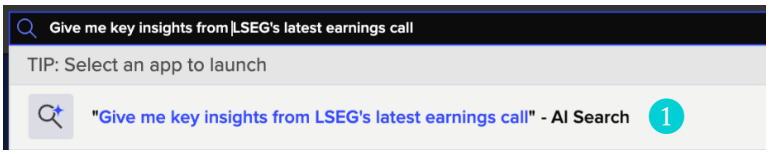
To use AI Search, you will need Workspace version 1.26.504 or above. AI Search is also available in Workspace 2.0.

How do I access AI Search?

You can access AI Search in several ways:

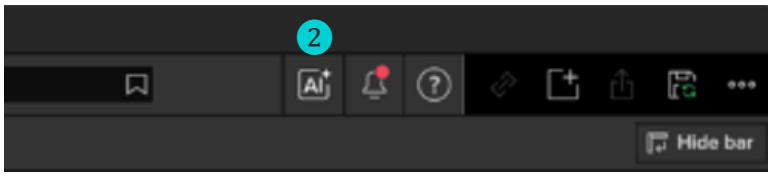
AI Search

Type your question in the Workspace search bar (for example “Give me key insights from LSEG's latest earnings call”), then press **Enter** or select the **– AI Search** 1 option from the dropdown.



AI chat

Launch the AI chat window within Workspace by clicking the **AI** button 2 to the right of the search bar.



If the AI button or AI Search is not visible, restart Workspace to refresh access.

Direct link

Click this link: https://workspace.refinitiv.com/web/rap/workspace-ai-app/

Microsoft Teams

Open the Workspace Teams app from the sidebar.

Microsoft 365 Copilot

Select LSEG Workspace from the Agents list.

Why might AI Search return different answers to different users?

Answers are based on the data and content that each user is individually entitled to access through their Workspace licence. Users with different licences may have access to different datasets, which can result in different answers to the same question.

Additionally, AI-generated responses are not deterministic, even with the same question and the same data access, answers may vary between users or across sessions. This is characteristic of how generative AI works.

Can AI Search access data I am not subscribed to?

No. AI Search only surfaces content from datasets that are included in your own Workspace entitlements. It does not bypass licensing or provide access to content to which you are not subscribed.

Asking and analysing

This section features questions that may be asked about the basic capabilities of AI Search.

What are the key features of AI Search?

The key features of AI Search are:

- **Natural language search:** Ask questions in plain English using the Workspace search bar, Workspace Launcher or by selecting the AI button, and receive answers sourced from a broad range of financial data, documents and news
- **Multi-turn chats:** Continue asking follow-up questions with full conversational context, including exploring insights and analysing data sets
- **In-line citations for documents and data:** Answers include clear, clickable citations with snippet previews. You can also follow a deep link from the side panel to open relevant Workspace applications directly. For document-based citations, clicking a citation opens the source document in a dedicated canvas view. For structured data – such as fundamentals, estimates, pricing, FX, fixed income, deals and ESG – citations appear inline at the point of use, so every figure can be traced back to its source. When data is presented in a table, each value carries its own citation
- **Data visualisation:** Where appropriate, quantitative responses are automatically rendered as charts, supporting a range of chart types including line, bar, radar, scatter and waterfall. For details, see What chart types does AI Search support?
- **Chat history:** Recent chats are automatically named based on your query, and can be renamed as required, so you can easily find and revisit previous questions and responses
- **Copy:** Copy prompts and full responses (including tables and charts with formatting) or specific excerpts
- **Export:** Export a response to PDF, or export tables to Excel. For details, see How do I export a response?
- **Response feedback:** Provide feedback to help us improve the quality of the answers
- **Prompt library:** Choose from ready-to-use prompts that are grouped by task – such as **Analyse**, **Compare** and **Forecast** – to see what AI Search can do and get started faster

> 📌 If you are not sure where to begin, select a category below the question box, such as **Analyse** or **Forecast**, to choose from ready-to-use prompts. You can also ask AI Search directly about its capabilities. For more information, see Can I ask AI Search about its own capabilities?.

What kinds of questions can I ask?

AI Search supports a variety of question types across financial markets and instruments, including data retrieval for factual queries, screening to build custom datasets or universes, and insights to provide narrative or contextual analysis.

It can also perform:

- Document summarisation, condensing long filings or transcripts into key highlights
- News retrieval, surfacing the latest company, sector, and market developments
- Comparison, allowing side-by-side analysis of companies, metrics or other data points
- Trend analysis, tracking how metrics change over time

Sample questions

This section provides a list of sample questions, giving you an indication of the type of questions you may ask:

Data retrieval

- What is NVIDIA's consensus EPS estimate for FY2026?
- What are the ESG scores for Shell and Exxon Mobil?

Screening

- Which banks topped the European DCM league tables in 2025?
- What are the coupon rates on the top 5 US high yield bonds YTD?

Comparison

- Compare the gross margin and operating margin of Apple and Samsung over the last four quarters.

Trends and analytics

- How have Amazon's revenue growth and operating margin trended over the last eight quarters?
- How have analyst EPS estimates for NVIDIA changed over the past three months?

Summarisation

- What did Alphabet management say about regulatory risks in Q4 2025?
- What were the key risks disclosed in Apple's latest 10-K?

News

- What's the latest news on Microsoft?
- Show me earnings-related news for Tesla over the last week.

Cross-dataset

- List the top 10 institutional holders of NVIDIA and show the best-performing semiconductor-focused ETFs year-to-date.
- Show me the M&A league table for global technology deals in 2025 and pull the EV/Revenue and EV/EBITDA multiples for SAP, Datadog, and Palantir.

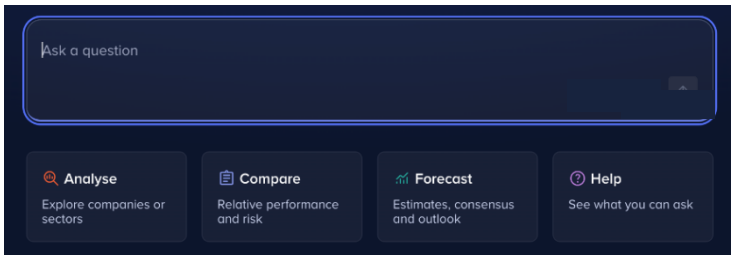
Complex multi-step

- Which semiconductor companies have the highest consensus EPS growth for FY2026? Then summarise what their management teams said about AI chip demand in Q4 2025 earnings calls.
- Identify the energy companies with the highest capital expenditure estimates for FY2026, then summarise what their management teams disclosed about energy transition risks in their FY2025 10-K filings.

Note that complex queries involving multiple data sources or detailed analysis may take a little longer to respond.

How do I use the prompt library?

When you start a new chat, select a category below the question box (**Analyse**, **Compare**, **Forecast** or **Help**) 1 to see a list of ready-to-use prompts. Select a prompt to add it to the question box, edit it if you need to, then send it.



1

What kinds of questions are not supported?

AI Search is currently focused on financial markets and instruments. The system is designed to answer financial-related questions using LSEG data. While it may provide informational insights, including both bullish and bearish perspectives based on available data, it does not provide financial or investment advice or trade recommendations.

Questions outside the scope of the product may sometimes be partially addressed through news or data-driven insights.

Can AI Search give me investment advice or recommendations?

AI Search does not provide financial or investment advice, recommendations, or trade suggestions. It is designed to surface and analyse information, not to recommend specific actions.

When you ask an investment-related question – such as whether to buy a particular stock – AI Search will respond with a balanced analysis covering the key factors for and against, all grounded in sourced LSEG data. Responses are informational only and do not take your personal circumstances into account.

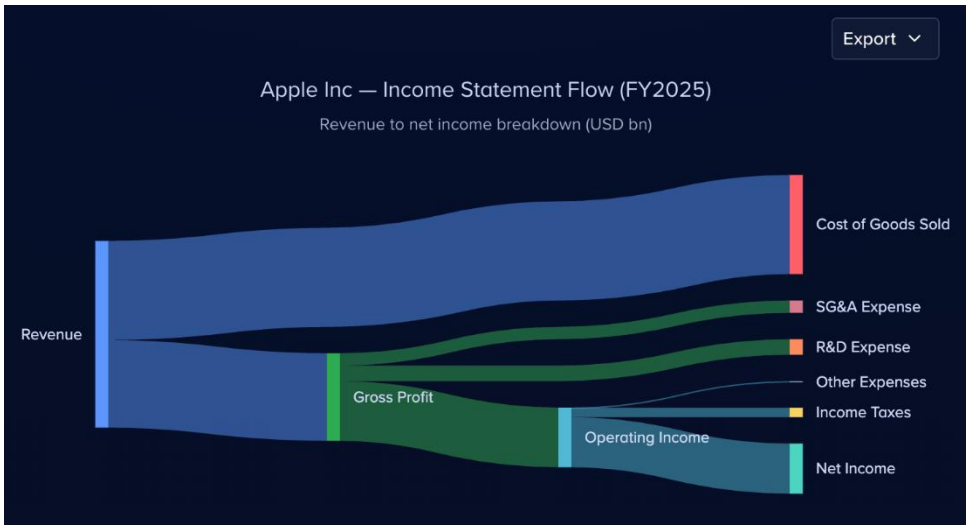
For example, if you ask, "Should I buy Tesla?", AI Search will not give a yes or no answer. Instead, it will present a balanced overview of relevant data – such as recent fundamentals, analyst consensus and valuation metrics – with sources and timestamps, alongside a disclaimer.

For decisions specific to your circumstances, you should consult a qualified financial adviser.

What chart types does AI Search support?

When presenting quantitative data, where appropriate, AI Search automatically renders a chart (as shown in the example, opposite) rather than a table.

You can export charts by downloading them as an image or copying them directly onto your clipboard.



The following chart types are supported:

Chart type	Best used for	Example
Line	Time series, single metric over time	Stock price trend, revenue over quarters
Bar (vertical)	Comparing up to 6 discrete categories	EPS comparison across peers
Bar (horizontal)	Comparing more than 6 categories	Top 10 shareholders by % held
Dual-axis (bar + line)	Two related metrics on different scales	Revenue (bars) + operating margin (line)
Area	Continuous curves with natural shape	Yield curves, volatility term structures
Donut	Part-to-whole breakdowns	Revenue split by segment
Radar	Multi-metric comparison of 2–5 entities	Peer scorecard (valuation, yield, ESG)
Scatter	Two-variable relationship across a set	P/E vs. EPS growth for a peer group
Bubble	Three-variable relationship	Market cap vs. P/E vs. growth
Waterfall	Period-over-period contribution bridges	Revenue bridge
Heatmap	Matrix of values across two axes	Implied volatility surface
Sankey	Flow of quantities between stages	Revenue breakdown by segment and region

Additional features include:

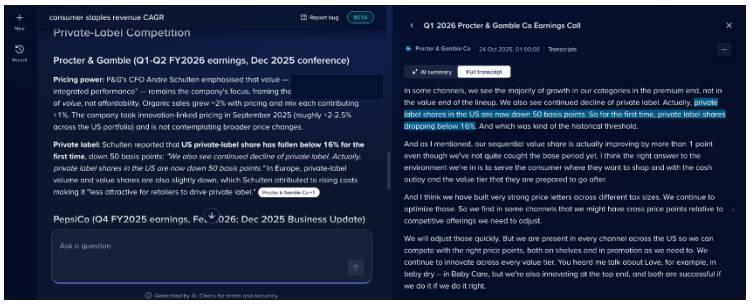
- Metric cards displaying headline summary numbers above charts, such as latest value or year-on-year change
- Reference line annotations for events, averages, or consensus targets
- Charts are interactive, hover over data points to reveal underlying values
- Dual-axis support for two Y-axes with different scales on the same chart
- Workspace colour palette and styling applied consistently across all charts

How do I view the sources used in a response?

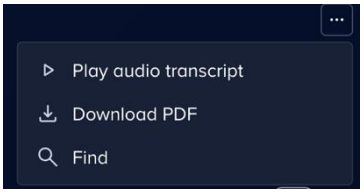
Responses for queries include transparent citations that appear inline at the point of use, so you can see exactly where the information comes from. Citations appear as clickable links with snippet previews. Hover over a citation to preview the source or click it to open it in the side panel. You can also click the source button at the end of a response to open a side panel that shows all referenced datasets and documents.

For documents and news articles, clicking a citation opens the source document in a dedicated canvas view. In canvas view, clicking a citation highlights the exact passage in the document (see below), making it easy to verify context and navigate directly to the relevant section.

For transcripts, an AI-generated summary is available as a tab alongside the full transcript.



When viewing a document in canvas view, select the three-dot menu to:



- **Play audio transcript:** listen to the recording of the event (transcripts only)
- **Download PDF:** save a copy of the document
- **Find:** search within the document using keywords
- **Zoom:** make the document larger or smaller (filings only)

How do I copy a prompt or response?

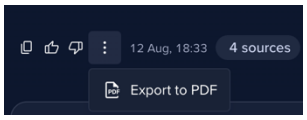
To copy a prompt or response, click the **Copy** button below it. When you copy a response, this includes the text, any tables or charts, citation links (URLs) and disclaimer.

You can also highlight a specific part of a prompt or response and copy it using standard keyboard shortcuts (for example, **Ctrl+C** or **Cmd+C**).

How do I export a response?

AI Search currently supports two export options:

- **Export to Excel** – for tables and data. To download an .xlsx file, click the three-dot menu on a table and select **Export to Excel**. A confirmation message appears once the file has been exported. The exported file includes a disclaimer.



- **Export to PDF** – for the current response. To download the response as a PDF file, click the three-dot menu on a response and select **Export to PDF**. Exports include a disclaimer at the top and bottom of the document.

Usage limits

This section features questions that may be asked about the limitations applied to the use of AI Search.

Are there limits on how much I can use AI Search?

Yes. To help ensure a reliable and consistent experience for everyone, AI Search applies fair-use limits during the early release phase.

These limits are designed to protect service performance while we learn more about adoption patterns, customer use cases and overall demand. As we gain a better understanding of how the service is used in practice, we may adjust these limits to reflect what constitutes reasonable usage and to ensure the best possible experience for all users.

Usage allowances follow a fixed calendar month, so your quota resets at the start of each new month. This makes it easier to plan and track your usage. You are unlikely to encounter these limits through normal day-to-day use, although particularly high levels of activity may cause you to reach your monthly allowance before it resets.

The current limits should be viewed as operational safeguards rather than long-term commercial entitlements. As AI Search matures, we expect to introduce commercial licensing models that provide greater flexibility, clearer usage allowances and options aligned to different customer needs and usage profiles.

Further details will be shared as these offerings are developed.

What drives my usage limits?

Your usage depends on the complexity of your question, not the number of questions you ask. Three factors typically drive higher usage:

- **Multiple data sources** – questions that require retrieving data from several sources consume more than single-source queries
- **Reasoning and synthesis** – questions that require comparing, analysing or drawing conclusions across data points use more than simple lookups
- **Computation** – calculations, rankings or screening across large datasets increase usage

To manage your usage:

- Use targeted, specific questions rather than broad ones
- Start a new chat when changing topic, so previous context is not carried over
- Narrow the scope where possible; for example, specify a smaller index or fewer companies

Managing chats

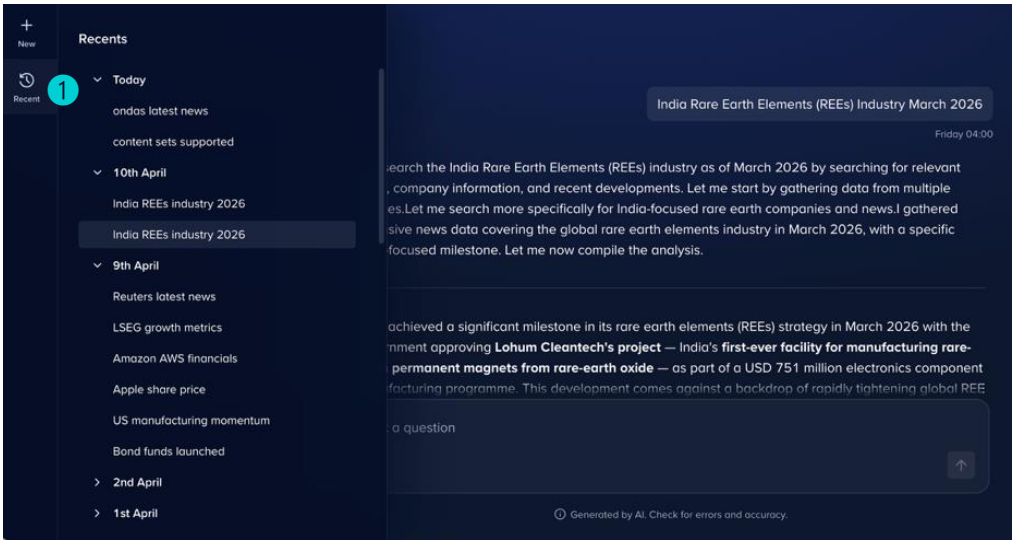
This section features questions that may be asked about the chat management in AI Search.

How do I view my chat history?

To see your past chats, click **Recent** 1.

Each chat is automatically named based on your first prompt and sorted by date.

Up to 100 of your most recent chats are shown here.



How do I rename or delete a previous chat?

To rename a previous chat:

1. Click **Recent** 1 then select the arrow next to a date 2 to expand its chats.
2. Hover over the chat you want to manage and click the vertical ellipsis (Options) 3.
3. Click **Rename** 4, input the new name and click **Save**.

Alternatively, click **Delete** 5 to delete the chat. You are asked to confirm first. Deleted chats cannot be recovered and are permanently deleted from our systems after 30 days.

When should I start a new chat?

Starting a new chat helps AI Search provide you with more accurate, focused responses, especially when moving to a different topic.

To start a new chat, click the **New** button at the top-left of the chat window.

Feedback and support

This section provides more detail on the options you have to provide feedback on the quality of responses from AI Search.

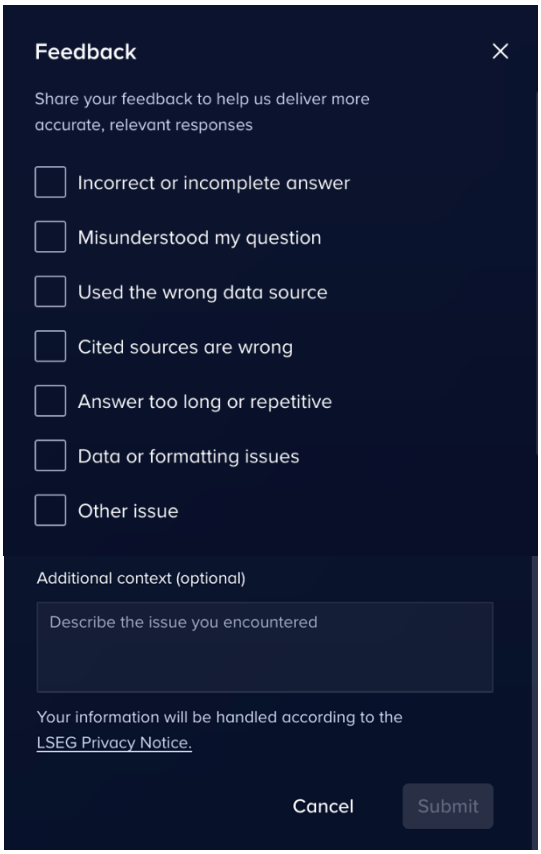
How do I provide feedback on a response?

After a response is generated, click the **thumbs up** or **thumbs down** button to let us know whether the answer was helpful.

If you select thumbs down, you will be asked to choose from a set of options – you can select multiple – describing why the response fell short.

You can add your own comments to describe the issue further.

We encourage you to share feedback on every response. The more detail you provide, the more we can improve the experience.



Can I ask AI Search about its own capabilities?

Yes. If you are unsure what AI Search can help with, you can ask it directly about its functionality, supported data, question types, data privacy and security, and how it can support your work. You can ask questions such as:

- What kinds of questions can you answer?
- What data do you have access to?
- How is my data handled?
- I'm a finance professional. How can you help me in my day-to-day work?
- Can you suggest prompts for preparing a client briefing?

You can also select **Help** below the question box for ready-made questions about using AI Search, such as data coverage, sources and citations, and chat history.

Can I opt out?

Yes. Contact your account manager to opt out of AI Search.

Supported data

This section provides more detail on the kind of data that can be accessed through AI Search.

What data is available?

AI Search has access to a broad range of financial data, analytics and content, organised across the following categories[1].

Fundamental and company data

- Financial statements – income statement, balance sheet and cash flow (reported and filed data)
- Company information – profiles, business descriptions, corporate structure, subsidiaries, classifications (TRBC, GICS, NAICS, SIC, ICB) and identifiers (ISIN, SEDOL, LEI, CUSIP, PermID)
- Operating metrics – sector-specific KPIs such as store counts, subscribers, ARPU and production volumes
- Officers and directors – executive profiles, biographies, compensation, education, board committees and shareholdings

Estimates and consensus

- Analyst consensus estimates – revenue, EPS, EBITDA and 340+ measures across fiscal periods
- Smart Estimates – StarMine accuracy-weighted consensus
- Price targets and recommendations – broker-level and consensus
- Company guidance – management outlook and guidance ranges
- Segment estimates – business and geographic segment-level forecasts
- Industry estimates – pharma drug sales, retail same-store sales and consumer unit sales
- Estimate revisions – track analyst revisions over a given window
- Analyst rankings – StarMine accuracy-weighted analyst rankings

Equity pricing and ratios

- End-of-day pricing – OHLCV, technical indicators (RSI, Bollinger Bands, moving averages) and risk metrics (beta, volatility)
- Valuation ratios – P/E, EV/EBITDA, P/B, dividend yield, forward multiples and consensus estimate ratios
- Historical pricing summaries – interday and intraday bar data

Fixed income and derivatives

- Bond pricing and analytics – by ISIN, RIC, or CUSIP
- Bond futures – pricing and analytics
- Interest rate swaps – vanilla, tenor basis, cross-currency and currency basis swaps
- Options – vanilla, Asian, barrier, and binary options (FX and equity underlyings) with full Greeks

FX markets

- FX spot pricing – cross-currency spot rates
- FX forwards – forward pricing and valuation
- FX forward curves – term structure of FX forwards

[1] Currently, not all content available in Workspace is available through Workspace AI Search. As new additional datasets are added, they may include additional product, commercial or third-party provider considerations.

Curves and surfaces

- Interest rate curves – yield curve data
- Credit curves – by country and issuer type (sovereign, corporate, agency)
- Inflation curves – by country and currency
- Volatility surfaces – FX and equity volatility surface generation

ESG

- ESG scores[2] – LSEG overall, pillar and category scores
- Climate data – GHG emissions (Scope 1/2/3), intensity metrics, Paris alignment, CDP data
- Environmental – energy, water, waste, biodiversity
- Social – health and safety, human rights, labour, community
- Governance – board structure, diversity, executive compensation, anti-corruption
- Screening – controversy flags, product involvement, UN SDGs

Ownership and shareholders

- Top shareholders – institutional and insider ownership reports
- Investor statistics – ownership breakdowns by type, style and region
- Insider transactions – insider trading activity and profiles

Corporate actions

- Dividends – history, tax, reinvestment plans and annualised dividends
- Capital changes – stock splits, buybacks, rights issues and spin-offs
- Share structure – shares outstanding, float, face value and voting rights

Deals and league tables

- M&A, ECM, DCM, and loans – deal tearsheets and league table rankings

News

- Companies (public or private), sectors, topics, themes and market events
- Up to 15 months of historical coverage
- Sourced from Reuters, leading newswires (Business Wire, PR Newswire, GlobeNewswire), LSEG's specialist capital markets publications (International Financing Review, Loan Pricing Corp, Project Financing International) and Public Technologies

Documents

- Transcripts – verbatim records of management presentations, discussions and Q&A across a range of corporate events, including:
  - Earnings calls, presentations and press conferences
  - Guidance and trading updates
  - Corporate strategy and analyst meetings
  - Investor and analyst roadshows
  - Sales and industry-focused presentations
  - Annual and extraordinary shareholder meetings
  - M&A calls and presentations
  - Interim management statement calls and presentations

[2] Jurisdictional restrictions may apply.

- SEC filings – annual reports (10-K, 20-F, 40-F), quarterly (10-Q) reports, and event and interim reports (8-K, 6-K) covering financials, Management's Discussion and Analysis (MD&A), risk factors and material disclosures
- Analyst research reports (an Aftermarket Research (AMR) subscription is required) – source extracts from broker and analyst research content; option to download full research report available in the source panel; note that AMR data will not be available in Microsoft 365 Copilot during the initial roll-out period

Screening and peer analysis

- Peer comparison – industry peer groups with comparative metrics
- Index constituents – S&P 500, FTSE 100 and other index chain data

Trading and execution data

- Trade data (Tora) – your historical trade records from Tora, which you can combine with LSEG market data, news and analytics
- Position data (Tora) – your current and historical positions across funds and portfolios, with filters to refine results
- Equity market analytics – VWAP, TWAP, volume, turnover, trade counts, OHLC data, venue market share and fragmentation analysis
- FX transaction cost analysis (Tradefeedr) – execution quality analysis (spread paid, fill ratio, reject cost), markout curves and market impact, LP competition and participation analysis, pre- and post-trade insights

For details of how LSEG processes personal data see the LSEG Privacy Statement.

How often is the data refreshed?

Refresh rates vary by data type:

- Transcripts are kept up to date with new or revised versions typically available within two hours
- Filings are typically available within two hours
- Broker research is typically available within eight hours of the broker's embargo expiry
- News is updated continuously
- Market data and pricing (equities, bonds, FX) reflect end-of-day values, unless otherwise indicated

Does AI Search have access to real-time market data?

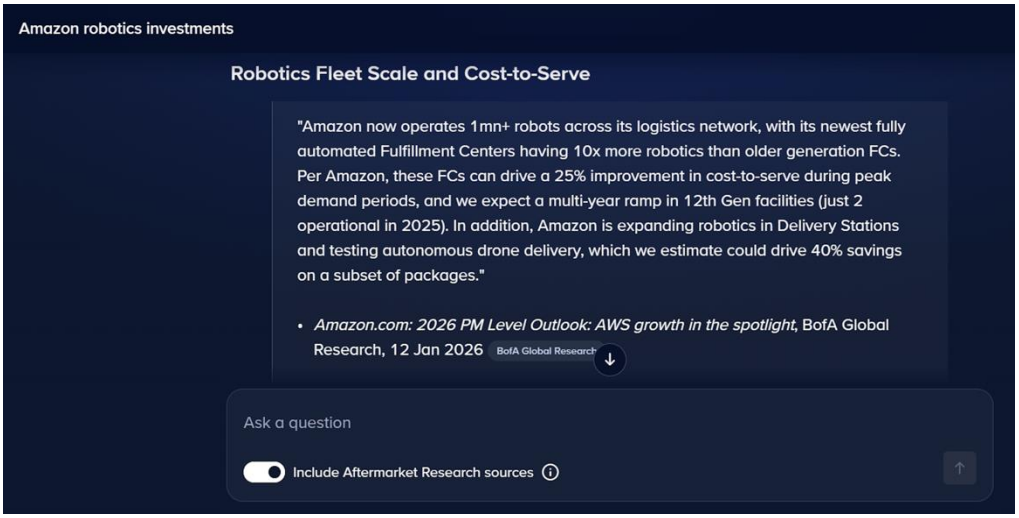
Unless otherwise indicated, AI Search currently surfaces market data and pricing as end-of-day values. Real-time data is not currently supported.

Why do some responses only show snippets?

Some content is only available as verbatim extracts (see image) rather than as fully summarised responses.

This applies to premium content such as analyst reports, which require an Aftermarket Research (AMR) subscription.

When an extract is returned, the response will show the exact text extracted from the source. No abstracted or AI-generated summary is provided.



Aftermarket Research (AMR)

This section contains questions that may be asked about Aftermarket Research (AMR).

Is AMR available to all users in AI Search?

No. AMR is only available to users with an active AMR subscription. If you are not entitled to AMR, no extracts are retrieved.

Are all AMR contributors available in AI Search?

The vast majority of AMR contributors are included in AI Search. A small number are excluded for contractual reasons, although their research remains available via ADVRES.

Does the use of AMR in AI Search count towards my AMR usage?

Yes. When an AMR extract is included in an AI Search answer, it triggers a page-level usage event for the page from which that extract came. This happens at the point the extract is displayed, regardless of whether you click through to the full report.

Usage is measured at page level. Downloading the full report counts as additional usage under standard document rules. The same page accessed multiple times within a 24-hour window is counted only once.

If I return to a previous conversation that contains AMR extracts, does that count as additional AMR usage?

No, not within a 24-hour period. The same AMR page accessed multiple times within 24 hours triggers only one usage event, including when revisiting previous conversations.

How does AI Search decide which AMR extracts to show?

AI Search uses a two-stage process to identify the most relevant AMR content for your query:

- First, the system searches across indexed AMR reports to retrieve candidate content that is semantically relevant to your question
- The AI then reviews the retrieved content and selects the extracts that best answer your question, based on the relevance to the specific terms and intent of your prompt

Only the extracts selected for inclusion in the final answer are shown, and only these extracts trigger a usage event.

Does AI Search generate AI summaries of AMR reports?

No. AI Search does not generate AI summaries of AMR content. You are shown verbatim extracts taken directly from the underlying AMR report. No generative AI interpretation, rewriting or summarisation of AMR content is performed.

Is AMR content combined with other content sources to generate answers?

No, AMR content is always surfaced as a distinct content source.

- AI Search does not combine AMR with other content sources to generate responses
- Where a query returns results from multiple sources, AMR extracts are displayed separately from other content types

How much historical AMR content is available in AI Search?

AI Search currently provides access to 18 months of AMR history.

Is Pay-Per-View (PPV) research available in AI Search?

No. Pay-per-view Research (PPV) is not available in AI Search. Access to AMR content in AI Search is limited to the AMR Subscription collection only. The PPV research collection is currently not supported.

Data privacy and security

This section provides answers to questions relating to data privacy and security in AI Search.

How does AI Search use generative AI?

AI Search currently uses two Large Language Models (LLMs):

- GPT-5 and above, and
- Claude Opus 4.6 and above

These are hosted in LSEG's secure Azure cloud infrastructure, for Retrieval Augmented Generation (RAG) and orchestration. This allows for enhanced data discoverability, making vast amounts of private and public company data discoverable and searchable, with the added potential to uncover new insights by connecting disparate data points across various financial assets.

📌 For more information about how we use AI, see our AI – Explainability Note.

Are the AI Search answers accurate?

AI Search is designed to deliver accurate, well-sourced answers. Every response is grounded in LSEG data and includes inline citations so you can trace any figure or statement back to its source. That said, generative AI can produce variable outputs – repeating the same question may return slightly different wording, and in rare cases responses may be incomplete or outdated. You should always verify critical figures against the cited source before relying on them.

Is my information secure when using AI Search?

Yes, your privacy and security are our top priorities. Your AI Search chat history and feedback are stored in a secure LSEG tenant. Your questions and prompts may be processed, either in full or in part, using the LLMs (described in How does AI Search use generative AI?) in a secure Microsoft tenant.

For details on how long your chat history is kept and what happens when you delete a chat, see Does AI Search store my chat history?.

Does AI Search have access to personal data I input?

Yes, AI Search has access to any data that you input as a question or prompt, including personal data. We scan everything you submit, and everything the system produces, to attempt to detect personal data. If we detect personal data in your query or in our response, we may decline to respond.

For details on how LSEG processes personal information, see the LSEG Privacy Statement.

Does AI Search store my chat history?

Yes. Your chats are kept indefinitely unless you delete them. When you delete a chat, it is removed from your chat history immediately and cannot be recovered. It is permanently deleted from our systems after 30 days.

Does AI Search use my questions or prompts to train the AI model?

LSEG will not use your prompts and responses to train the base AI. Your prompts and responses may be used in anonymised form to evaluate the performance of the product and to help us understand how to improve AI Search. Your prompts and responses are not available to other customers or used to improve any Microsoft or third-party products or services.

Is the AI in AI Search used responsibly?

Yes. LSEG follows Responsible AI Principles, which draw on existing frameworks to guide our approach to AI adoption. Using these principles, we aim to enable the safe and responsible use of AI for employees and customers to accelerate growth and enhance delivery capabilities throughout the financial services lifecycle.

Additionally, AI Search uses a combination of deterministic and LLM-driven content and abuse monitoring filters that apply regardless of which models are used. In addition, we make use of the content filtering and abuse monitoring features provided by Microsoft's Azure OpenAI Service when using GPT-5 and above.

Help and support

This section describes the help and support available to users of AI Search.

How can I provide feedback on AI Search?

We encourage users to provide feedback in any of the following ways:

- Click thumbs up or down for every answer to let us know if the answer was accurate and helpful or not – then select an option and send a comment to let us know how the response could be improved
- Contact your account manager or LSEG Support
- A research interview will also be organised, where you can provide free-flowing feedback to our product and user research team
- You can also take our feedback survey and share your thoughts on performance, usability and other aspects of AI Search

What should I do if AI Search is not working?

Try reloading AI Search chat or closing Workspace and opening it again. If that does not work, contact LSEG Support.

Future developments

This section provides more detail on upcoming enhancements to AI Search.

Will there be new features added in the future?

Yes, we are continuously working to enhance AI Search. Future updates may include expanded datasets as well as new features and improved visualisations. You are invited to continue sharing feedback regarding product enhancements by contacting LSEG Support.

Using AI Search – important information

By using the feature, you are helping us identify areas for improvement and therefore enhancing the overall experience.

We have built-in filters and safeguards to prevent misuse, and we are continually working to improve them. While the system is designed to handle most edge cases, we ask that you use it responsibly and avoid intentionally pushing its limits.

To help ensure a fair and productive experience for everyone, all participants must agree to:

- **Use AI Search responsibly and avoid prompt injections**
  - Do not try to trick, manipulate or 'hack' the system by inserting hidden instructions, misleading inputs, commands or special phrases intended to confuse the model, break the rules, bypass restrictions or override its normal behaviour
- **Not rely on responses as financial or investment advice, or for trade recommendations**
  - Responses from AI Search are informational only and must not be relied on as financial or investment advice or as recommendations to buy, sell or hold any investment – you are responsible for verifying accuracy and suitability for your use
- **To report problems and not to exploit them**
  - If you notice unusual results or areas for improvement, contact us
- **Understand that misuse of the feature may lead to removal**
  - If you break these conditions, your access to AI Search may be suspended or permanently revoked

Glossary

Canvas – An interactive surface where users can view, explore and interact with content such as documents or results.

Chat history – A stored record of previous chats and responses, allowing users to revisit past queries and continue chats.

Citation – A reference to the source of a data point or statement, allowing users to verify where the information came from.

Dataset – The underlying content the system works with, including market data, fundamentals, estimates, ESG metrics, news and documents such as filings and transcripts.

Deep link – A link that takes users directly to the relevant location within a Workspace application.

Entitlements – The data and content a user is permitted to access through their Workspace licence and subscriptions, such as AMR. AI Search only uses content the user is entitled to.

Grounding – See *Retrieval Augmented Generation (RAG)*.

Large Language Model (LLM) – A type of AI model trained on large amounts of text, used by AI Search to understand questions and generate responses.

Multi-turn chat – A sequence of related queries where the system retains context from earlier queries within the same chat.

Orchestration – The process of coordinating different data sources and steps to put together a complete answer to a user's question.

Prompt – The question or instruction a user types into AI Search, in plain English. Clear, specific prompts usually get better answers.

Retrieval Augmented Generation (RAG) – A technique where the AI retrieves relevant information from trusted data sources before generating a response, helping ensure answers are grounded in factual content.

Side panel – The panel that opens alongside a response, showing all referenced datasets and documents used to generate it.

Snippet – An exact, verbatim extract from a source document, shown without AI-generated summarisation.

Sources (in-product) – The datasets and documents used to generate a response, which users can view and verify.

User feedback – A mechanism for users to rate responses and provide input to improve system performance.

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