



Syntax Data Announces Saidee, Exclusive AI Agent and Portfolio Development Application



Sarah Grieco March 5, 2026

Groundbreaking tool enables financial advisors to provide AI-optimized investment solutions via Syntax Direct™ custom indexing platform

Syntax Data, a leader in financial data and technology, today announced the official launch of Saidee™, its premier AI agent and portfolio development application. Designed to empower financial advisors, Saidee enables the seamless creation, ongoing management, and marketing support of customized, rules-based portfolios and indices. The application is now fully available to the RIA community via **Syntax Direct™**, Syntax's custom index creation platform.

"Saidee is adept at designing indices for all kinds of scenarios and uses," said **Patrick Shaddow**, CEO of Syntax. "Saidee is destined to become an essential support tool for RIAs, financial advisors, and investment managers intent on providing better investment solutions for their clients."

Saidee provides four main functions:

- **Market Outlook:** Tell Saidee an outlook on the economy, markets, or specific sectors. Saidee will design an index that turns perspectives into actionable portfolios.

- **Client Profiles:** Give Saidee a client profile: their age, income, risk tolerance, and goals. Saidee will help design a portfolio aligned with these needs and aspirations.
- **Just Good Ideas:** Share ideas with Saidee. Have a thesis on themes, sectors, or factors? Saidee can bring these ideas to life as a custom, rules-based portfolio.
- **Commentary:** Ask Saidee to explain the key characteristics of a recently created portfolio. Saidee can provide digestible analytics and comparisons against recognized benchmarks.

“Most AI tools pull from the open web with minimal control over the data and its sources,” said **Sean Sandys**, CTO of Syntax. “Saidee is different, drawing on Syntax’s proprietary data and institution-grade processes – and that discipline drives the quality of what comes out.”

Rather than drawing on the open web, Saidee operates from a vetted set of institutional-grade sources – including proprietary Syntax data – so outputs can be traced back to the documents behind them. Saidee can also be configured to incorporate a firm’s proprietary research, such as market outlooks and buy lists. Because every data point has been thoroughly cleansed and results are traceable to their sources, Saidee delivers the consistency, accuracy, and auditability that advisors in a regulated industry require.

“Saidee is a true gamechanger,” said **Rory Riggs**, Chairman of Syntax. “Using our proprietary data, it helps investment managers create rules-based portfolios that marry sound investment principles with clean and accurate data in ways that were unimaginable as little as six months ago.”

Saidee is now available to the RIA community via Syntax Direct. To learn more, or to sign up for an exclusive demo, **please click here**.

ABOUT SYNTAX DATA

Syntax Data is a leader in proprietary financial data and automated portfolio construction, powered by its Functional Information System (FIS®) technology and its AI-based portfolio development agent, Saidee. FIS® classifies and connects companies by their true functional economic role and interconnections – moving beyond traditional sector labels to reveal granular hidden risk correlations and structural relationships that drive portfolio performance. Together, FIS, Syntax Direct, and Saidee empower investment managers, wealth advisors, and financial institutions with precise, transparent, and interconnected data solutions that optimize financial research, portfolio customization, index development, and investment analysis. Syntax operates through three segments: Affinity® Data, Syntax Direct with Saidee, and Syntax Indices. Learn more at www.SyntaxData.com.