



BetaNXT Launches InsightX Enterprise AI Platform and AI Innovation Lab, Democratizing Access to Insights for All Users

*New Wave of Investment Delivers Powerful AI Capabilities Tailored Specifically for the
Operational Needs of Wealth and Asset Management Firms*

New York, NY – April 7, 2026 – [BetaNXT](#), a leading provider of wealth management technology solutions with real-time data capabilities and an enhanced advisor experience, today announced the next wave of its ongoing investment in artificial intelligence (AI). The launch of **InsightX**, BetaNXT's enterprise AI platform, and the creation of the **BetaNXT AI Innovation Lab**, designed to fast-track the delivery of AI solutions, represent the latest milestones in the company's commitment to democratize access to AI-driven insights. As the company [previously announced](#), ongoing AI innovation efforts will concentrate on four key areas: data aggregation, workflow automation, business intelligence and predictive analytics.

An AI Approach Built Around Client Needs

BetaNXT's AI strategy centers on intentional innovation: translating AI into practical applications that solve essential client needs, rather than deploying new technology for its own sake. The company's focus is on making AI accessible and valuable to operators, advisors and leaders – not just technical users – through actionable intelligence seamlessly embedded into natural workflows.

While AI innovation has initiated change for every industry, within the highly regulated world of financial services, it has been especially challenging for firms to move from experimentation to operationalization. Progress for many enterprise teams has stalled due to strict regulatory requirements, complex technology stacks, legacy systems, and siloed access to AI.

"We are hearing from our clients that they're focused on scaling AI's transformative impact beyond their data and technology teams," said **Bob Santella, CEO of BetaNXT**. "Figuring out how to integrate AI smoothly into day-to-day operations, advisor interactions and leadership decisions is the key to unlocking AI's full potential. Our vision is to break down the barriers to AI adoption in order to bring intelligence and insights to every user in our industry, regardless of their technical background."

Introducing InsightX: A Platform Powering Firms' AI Success

InsightX serves as the centralized data and intelligence engine powering BetaNXT's ecosystem and solutions. This powerful AI platform delivers automation, analytics and insights across enterprises, enabling all users to enhance their productivity, performance and outcomes.

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Unlike general-purpose AI tools, InsightX is built specifically for asset and wealth management operations, translating BetaNXT's domain expertise and proprietary knowledge into intuitive solutions that understand clients' needs and workflows from the start. The difference shows up in three ways:

1. **Data Quality and Governance** – InsightX's data is modeled by domain experts and defined consistently across business units, with embedded governance and metadata that make data lineage traceable and auditable.
2. **Domain-Aware Design** – The platform incorporates BetaNXT's institutional knowledge of how operations teams and advisors actually work, so outputs improve real-life workflows – resulting in fewer exceptions, higher productivity and smarter decisions.
3. **Explainability** – Every insight comes with transparency into methodology and data sources, so users can trust responses and recommendations, something general-purpose AI tools can't reliably offer in a regulated environment.

InsightX offers firms a springboard to AI success: they can easily adopt the foundational capabilities of BetaNXT's cloud-native, institutional-grade platform instead of building AI capabilities from scratch.

With a flexible deployment model, clients can access InsightX capabilities in multiple ways – embedded within existing BetaNXT solutions, integrated via API into firms' proprietary interfaces, or via these standalone offerings:

- **Data Studio** – A self-service tool for creating custom dashboards and data visualizations, with agentic AI assistance and analytics.
- **Compass** – An AI assistant that enables natural-language prompting for operational intelligence. The Compass API allows firms to integrate this functionality into their own applications.
- **Solutions Hub** – A central hub for complete, production-ready AI solutions developed by BetaNXT to address specific operational or business needs.

“The launch of InsightX is a major leap forward for firms at every stage of AI maturity,” said **Jonathan Reeve, Chief Product Officer at BetaNXT**. “From boutique asset managers looking to optimize distribution, to large broker-dealers seeking to enhance advisor support, to corporate issuers focusing on investor engagement, our AI platform provides the infrastructure and tools they need. Whether a firm wants to deploy pre-built AI solutions today or build their own AI capabilities for tomorrow, having BetaNXT as a partner can significantly accelerate their journey.”

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BetaNXT AI Innovation Lab: Streamlining Development & Integration of High-Impact AI Solutions

Alongside InsightX, BetaNXT is launching its AI Innovation Lab – an accelerator designed to rapidly move AI initiatives from concept to production. Powered by the OneNexus platform, the Lab leverages BetaNXT's deep domain expertise with advanced AI capabilities and agile development practices to deliver production-ready solutions in as little as 90 days.

“AI initiatives often stall when firms try to scale beyond experimentation, held back by legacy systems and operational complexity,” said Chris Nobles, Division Executive for Mediant, a BetaNXT business. “The BetaNXT AI Innovation Lab is designed to break that cycle, delivering AI-native workflow solutions from concept to production in weeks, not years. We’re already working with clients on high-impact challenges where speed and execution matter most.”

The Lab will focus its initial efforts on the highest-impact use cases across the wealth management lifecycle, targeting high-cost manual workflows and high-value opportunities to enhance intelligence, efficiency, and user experience. Initial solutions are already in development and set to be announced in the coming weeks.

AI embodies the next evolution in BetaNXT’s longstanding partnership with industry leaders. With InsightX and the AI Innovation Lab now in place, BetaNXT offers asset and wealth management firms a path for accelerating their growth.

For more information about InsightX, the AI Innovation Lab or BetaNXT's AI strategy, please contact your BetaNXT relationship manager, or visit betanxt.com.

About BetaNXT

BetaNXT powers the future of Connected Wealth by investing in platforms, products and partnerships to accelerate growth. It is a leading provider of frictionless wealth management enterprise solutions, real-time data capabilities and an enhanced advisor experience. Through its software, data, and operations-as-a-service approach, BetaNXT empowers its clients with flexible, efficient and connected solutions that anticipate their changing needs. BetaNXT's comprehensive model reduces enterprise cost, streamlines operations processes, increases advisor productivity and strengthens the investor experience. Together with BetaNXT, wealth management firms are transforming their platforms into game-changing differentiators that enable enterprise scale and stimulate commercial growth. For more information visit www.betanxt.com.

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