SS&C Technologies Unveils Portfolio of AI-Enabled Enhancements; Debuts Six-Part Agentic Blueprint Docuseries at SS&C Deliver

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New AI-enabled solutions and enhancements roll out across SS&C's financial services and healthcare businesses, alongside a six-part docuseries on the company's own agentic AI transformation

WINDSOR, Conn.--(BUSINESS WIRE)--Sep. 23, 2026-- SS&C Technologies Holdings, Inc. (Nasdaq: SSNC) today unveiled a suite of next-generation solutions at its annual **SS&C Deliver 2026** conference. More than 1,100 leaders from the financial services and healthcare industries gathered in Orlando, Florida, to learn how SS&C is optimizing business workflows with AI-enabled services.

A core technology set spanning wealth, retirement, alternatives and asset management is built on the SS&C AI Gateway governance platform. SS&C WorkHQ, the company's award-winning agentic orchestration platform, enables interoperability across these solutions. SS&C also debuted the six-part *The Blueprint: Customer Zero* docuseries, a behind-the-scenes look at how SS&C is running the same agentic transformation it is now bringing to its 23,000 clients.

"Agentic AI is challenging enterprises. The technology moves fast, the governance stakes are high, and organizations benefit only when the technology can be effectively incorporated into their established workflows," said Bill Stone, Chairman and CEO, SS&C Technologies. "We put AI Gateway and WorkHQ in place so a growing set of our AI capabilities ships on a governed, orchestrated foundation. This foundation enables our customers to scale with purpose-built AI tools already optimized."

The conference opened with SS&C ringing the Nasdaq opening bell alongside Nasdaq President CEO Adena Friedman. The second day kicked off with a thought-provoking fireside chat between Bill Stone and David Booth, Chairman of Dimensional Fund Advisors. The two founders explored lessons learned building their firms, in the evolution of financial services, and what's next. Booth also shared insights from his new book, *Stay Calm: Learn to Embrace Uncertainty in Investing and Life* (Authors Equity, 2026).

New Enhancements Leveraging SS&C AI Gateway and WorkHQ

- **Black Diamond AI**, a series of artificial intelligence-enabled enhancements for SS&C Black Diamond® Wealth Solutions.

Black Diamond AI combines in-platform AI assistance, contextual insights, natural language data queries, and connected AI experiences to help advisors and operations teams reduce manual work, access relevant information, and act more efficiently.

- **ConnectIQ**, an AI-powered advisor engagement platform for the Retirement market. The platform consolidates investor and participant data from multiple sources and leverages predictive analytics to deliver actionable insights and identify opportunities for personalized outreach. ConnectIQ enables retirement advisors to engage at scale, track interactions and provide more relevant guidance through a single, integrated experience to help improve client retention and outcomes.
- **SS&C Insight AI**, a series of AI-enabled enhancements for the SS&C GlobeOp alternative fund administration suite. The capabilities enable a more robust NAV and allocation review processes with AI-assisted data review.
- **Sales Prep**, an AI-powered prospecting and customer relationship management tool for asset management distribution teams.
- **The AI-powered portfolio management assistant embedded in Genesis** enables investment teams to identify opportunities, access portfolio insights, and initiate workflows using natural language. With these enhancements, Genesis moves AI into advanced actionable outcomes to save time and reduce errors for investment teams.

The Blueprint: Customer Zero Docuseries

The six-part *The Blueprint: Customer Zero* documents how SS&C itself has adopted agentic AI, covering the strategic bet, operating design, governance, technology, people, and value realized. The first four episodes publish this week; the final two, *The People* and *The Value*, follow in late October. The series is housed on customerzero.blueprism.com.

SS&C Technologies continues to focus on purpose-built, AI-enabled technology and service solutions for the financial services and healthcare industries. Learn more on ssctech.com.

About SS&C Technologies

SS&C is a leading provider of mission-critical, AI-powered technology and services that help financial services and healthcare organizations operate smarter, faster, and more securely. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices worldwide. More than 23,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale and technology. Additional information about SS&C (Nasdaq: SSNC) is available at www.ssctech.com.

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