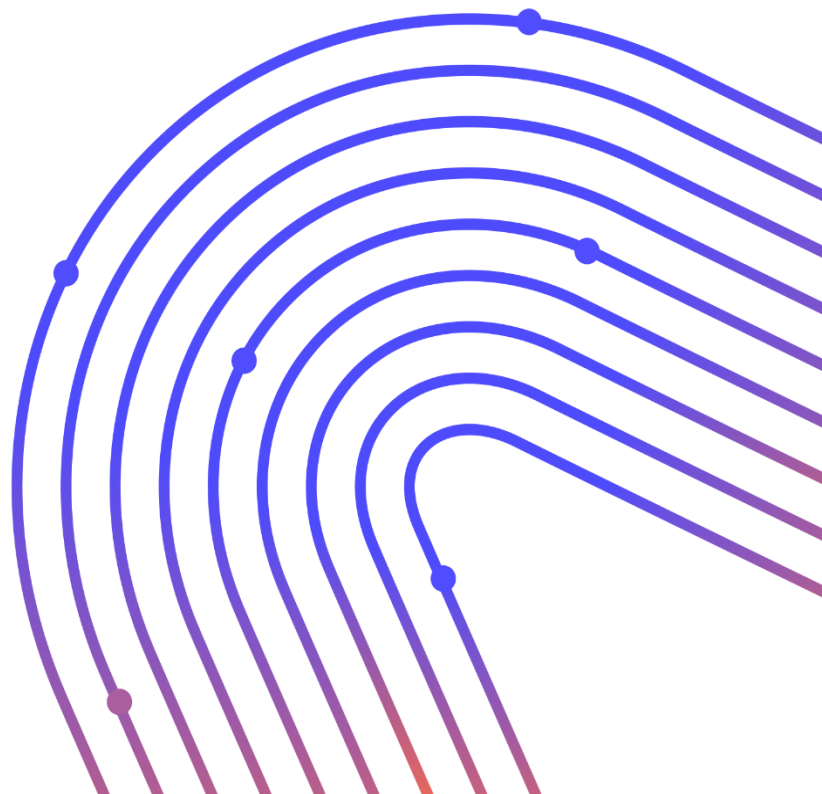




Getting Started with
Atominvest MCP
for Portfolio Management

Connect your AI assistant directly to your Atominvest data



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1. USING THE MCP AND BEST PRACTICES

The Atominvest MCP (Model Context Protocol) connector allows you to query your portfolio data directly from an AI assistant — such as Claude or ChatGPT — without leaving the tool you are already working in. This section explains how to get the most out of the connector once it is set up.

Overview

Once connected, you can ask questions about your portfolio data in plain language. The AI will query Atominvest on your behalf and return structured responses based on the metrics, assets, and funds you have access to.

The quality of the output depends largely on how the question is framed. The guidance below will help you get consistently useful responses.

How to Query Your Data

The most effective queries are specific and anchored. Rather than asking broad, open-ended questions across your entire portfolio, ask about a particular asset, metric, and time period. Once you have a focused response, you can layer on additional context — extend the time range, pull in comparisons, or ask the AI to explain what is driving the numbers.

Avoid overly broad questions such as:

- *"Give me a full summary of how all 20 assets have performed over five years."*

This type of query gives the AI too wide a scope to surface meaningful analysis in a single response.

Instead, structure queries with a clear anchor:

- A specific asset or set of assets
- A selection of metrics
- A defined time period
- A comparison or trend question

Once the AI has a focused starting point, you can build on it across the conversation.

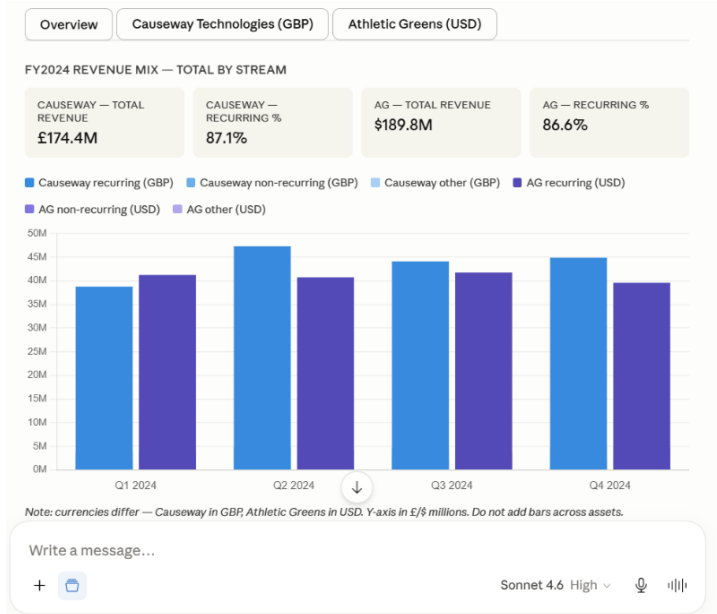
Additional in-LLM builds:

- **For repeatable workflows**, if you find yourself running the same analysis regularly, such as a monthly KPI review for a specific asset, consider setting up a Project in Claude. You can store standing instructions, preferred metrics, and context about the asset so the AI knows exactly where to look each time, without needing to re-establish the brief.

Example Queries

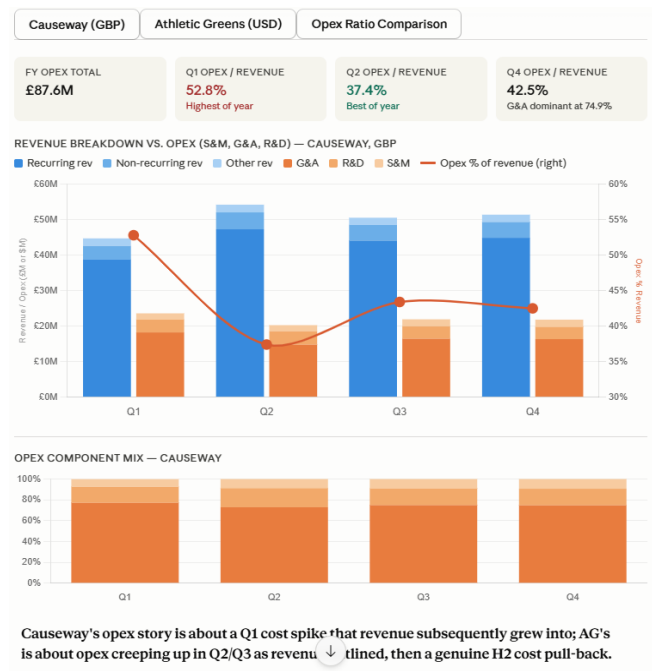
Single asset & cross portfolio queries, targeted metrics

Show me the revenue breakdown for Causeway and Athletic Greens over 2024 on a quarterly basis in an interactive chart.



Layered analysis

Break down the impact of the OpEx variation on revenue, and assess the interdependence.

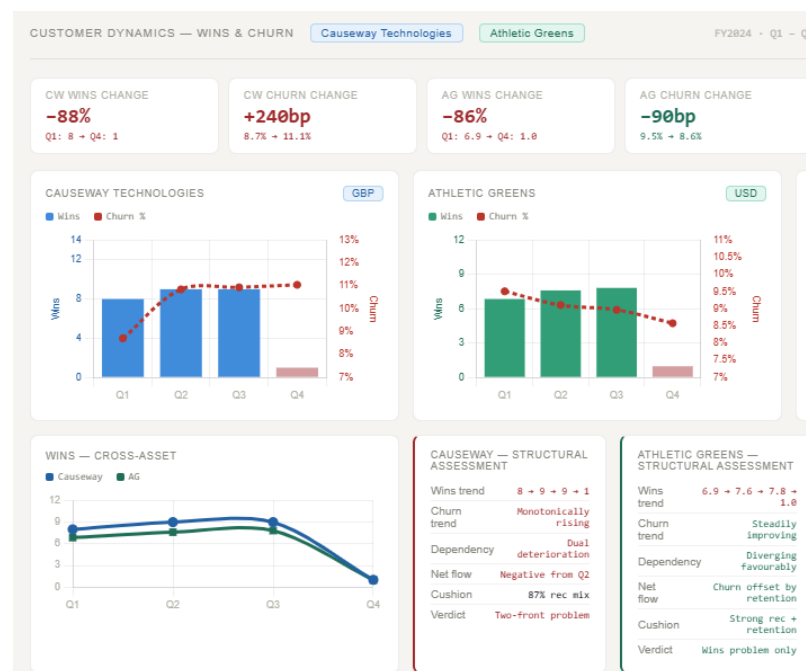


Thematic or sector filter

Compare Algolia's growth trajectory to the other technology investments (Deel and Causeway) in the portfolio over the last 18 months.

Qualitative and quantitative combined

What did the deal team commentary say about Causeway & Athletic Green's revenue trend and EBITDA margin for this period? Why might this be happening - layer on any operational or performance commentary available for that time. Build me an informational dashboard.



Tips for Best Results

- ✓ Be explicit about the time period — quarterly, annual, last 12 months, and so on.
- ✓ Build analysis incrementally: start with a few metrics and expand from there.
- ✓ Set up project contexts in your LLM to steer the AI to Atominvest by default, and govern how information is surfaced to you (e.g. tables, charts etc)
- ✓ For repeated analysis workflows, consider setting up a dedicated Claude Project or conversation context with standing instructions to use Atominvest. This avoids having to re-establish context in each session.

Example Atominvest Portfolio Assistant: Project Instructions



You have direct access to the Atominvest portfolio database via MCP tools. Use it to answer questions about portfolio companies, funds, and metrics with precision and analytical depth.

Tone and style

Lead with the answer. State the headline figure or finding first, then provide supporting context. Never bury the conclusion.

Be concise and analytical. Surface notable trends, margin movements, or anomalies automatically — without being asked. A single sharp observation carries more weight than three lines of description.

Do not narrate your process. Do not reference tool calls, system IDs, or query steps in your response. Simply deliver the output.

Data retrieval

Where a request involves multiple assets or metrics, retrieve all data simultaneously rather than sequentially. Do not make the user wait for results that can be fetched in parallel.

If information has already been retrieved earlier in the conversation, use it directly. Do not re-fetch data already in scope.

Clarifying metric selection

If a user refers to a metric by a general term — for example, "EBITDA" or "revenue" — and there are multiple metrics in the system that could match, do not guess. Ask explicitly which metric they mean and list the available options clearly. A precise answer from the right metric is always preferable to a fast answer from the wrong one.

Presenting output

Always state the currency alongside any figure. Never report a number without it.

For time-series data, default to a chart rather than a table. For single-period comparisons across multiple assets, use a table or metric cards.

Follow every chart or table with a short analytical commentary — two to four sentences covering what the data shows, any material movements, and anything that warrants closer attention.

Automatic analysis

Where revenue and EBITDA are both in scope for the same period, calculate and surface the EBITDA margin without being asked.

Where data spans multiple periods, calculate and surface the period-on-period growth rate.

Where multiple assets share the same metric, rank them.

Flag any month or period where a metric moves materially versus the prior period.

Note on complex formula metrics: Though uncommon, where a metric is itself derived from multiple underlying formula metrics, querying it across several periods simultaneously may produce a large response. The product team is actively working to increase the data volume supported in a single call. For now, querying one metric or time period at a time is the most reliable approach for formula-heavy metrics.

2. SETTING UP THE MCP CONNECTOR

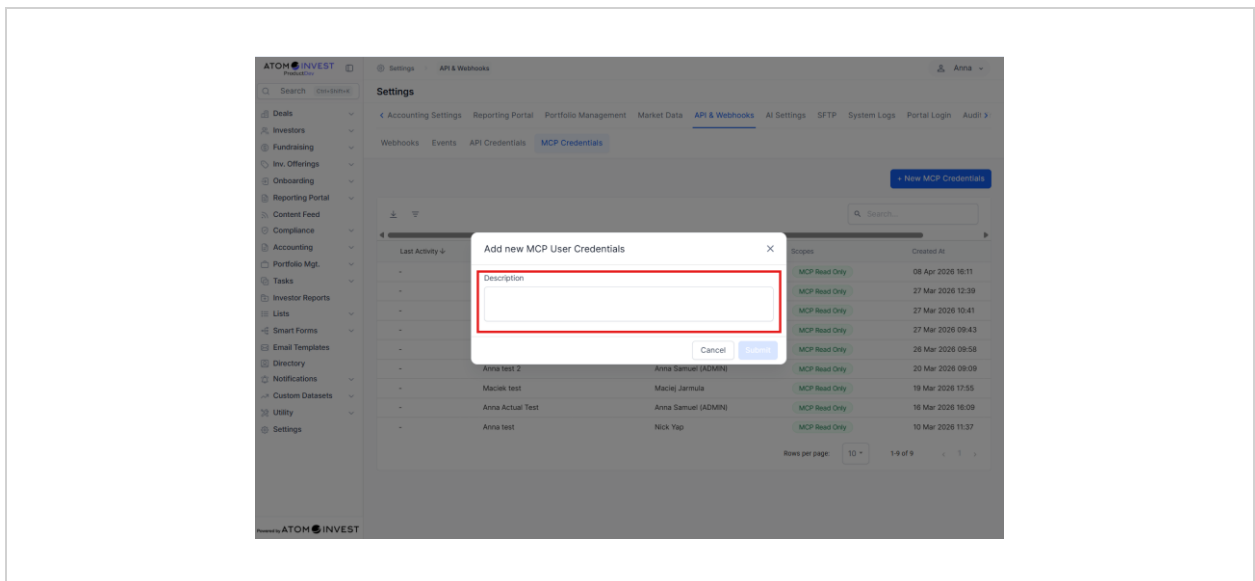
This section covers everything you need to connect your AI assistant to Atominvest, including obtaining your MCP key, setting up the connector in Claude, and setting up the connector in ChatGPT.

Generating Your MCP Key

Each user connects to the MCP using an individual API key generated within Atominvest. Keys are personal — they should not be shared between users. Each team member who wants to use the MCP connector will need to generate their own key.

Preliminary steps (to be confirmed):


1. Log in to Atominvest.
2. Navigate to Settings > API & Webhooks.
3. Select the MCP Credentials tab.
4. Generate a new key. Copy the key value carefully, once created it cannot be re-accessed (but can be regenerated..



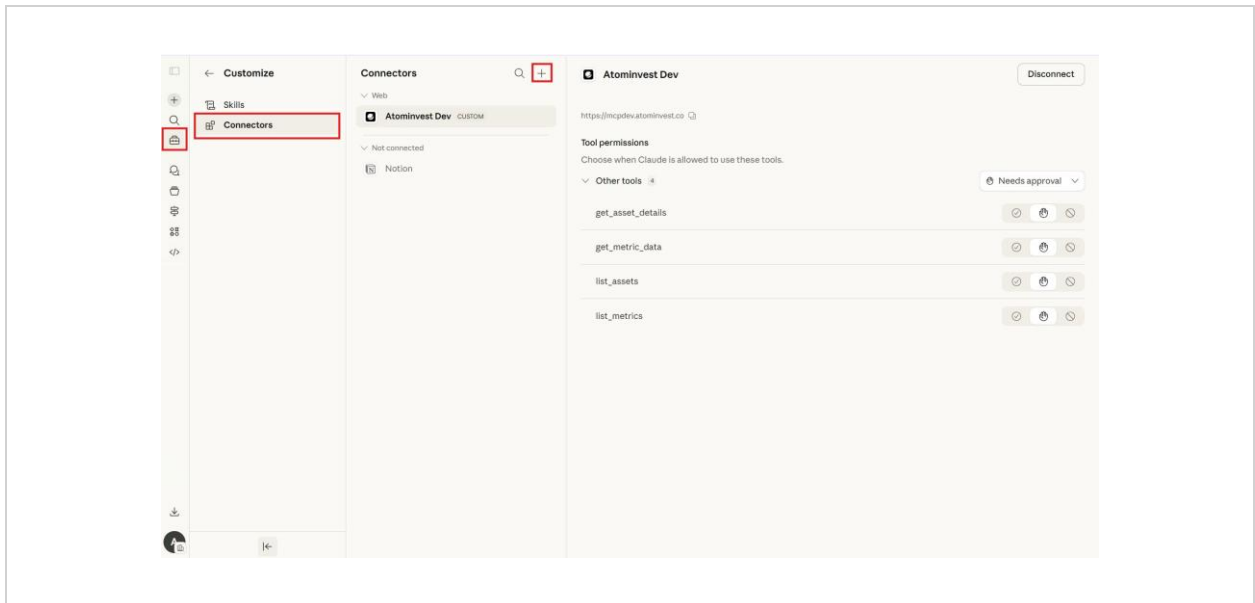
Once you have your key, follow the relevant setup section below for Claude or ChatGPT.

Connecting to the MCP in Claude

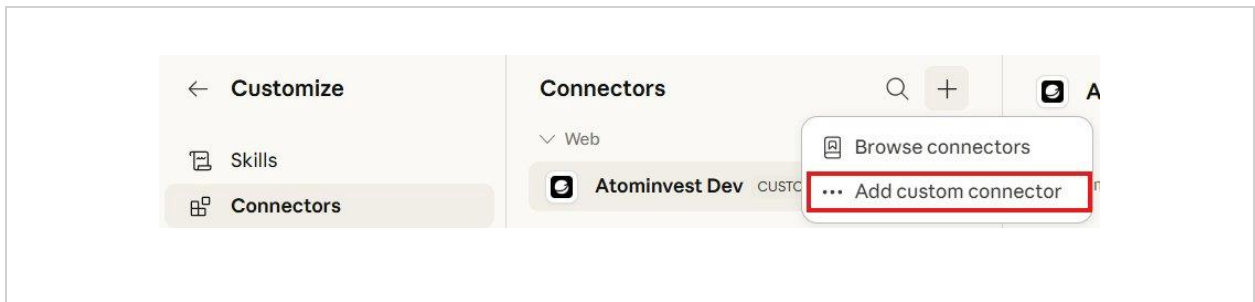
Step 1 — Add the connector to your organisation's account

 You will need to be a system administrator.

5. Go to Customise > Connectors and click the + button.



6. Click Add Custom Connector. This will open the Add Custom Connector modal.



7. Name the connector — this is how it will appear to other users in your organisation.

8. Enter the MCP server URL:

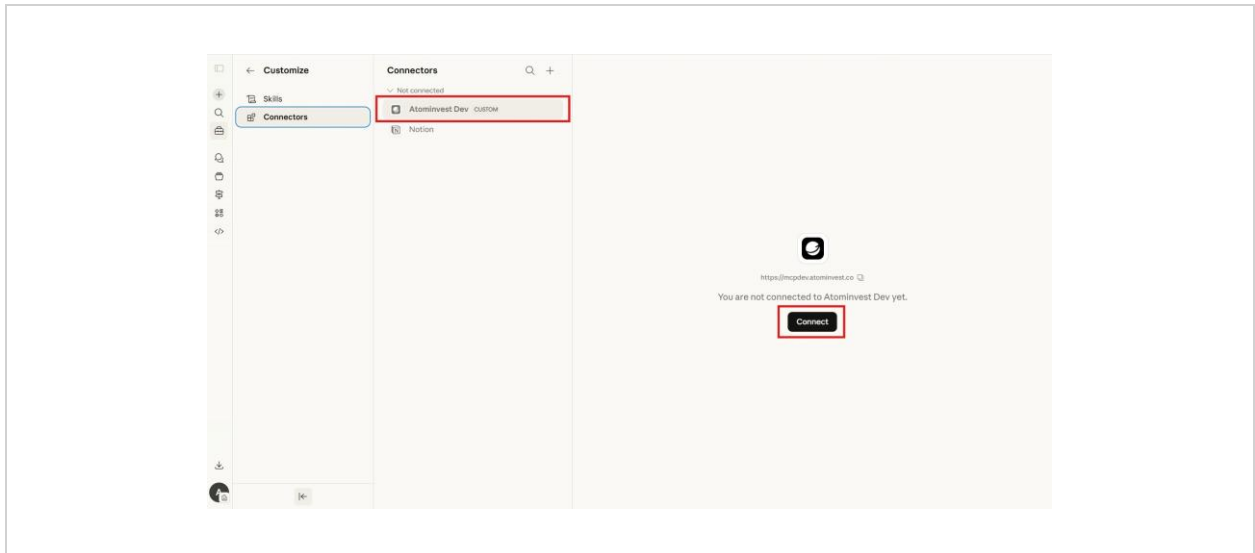
`https://mcp.atominvest.co`

9. Click Add.

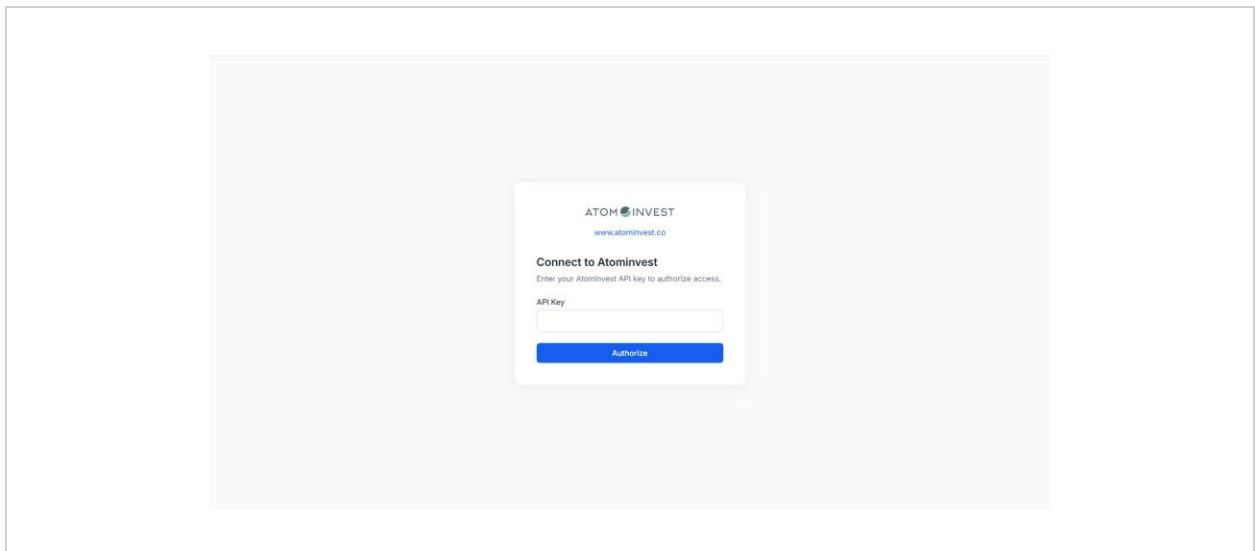
Step 2 — Personally connect to the MCP

Once the connector has been added to your organisation's account, each user must connect individually using their own MCP key.

10. Go to Customise > Connectors.
11. You will see Atominvest listed under Not Connected. Click on it, then click Connect.



12. You will be redirected to the Atominvest MCP authorisation page. Paste your MCP key into the input field and click Authorise.



13. You are now connected. In your first message of any conversation, reference Atominvest by name.

From that point, the AI will continue using Atominvest contextually within the same conversation without needing to be prompted again.

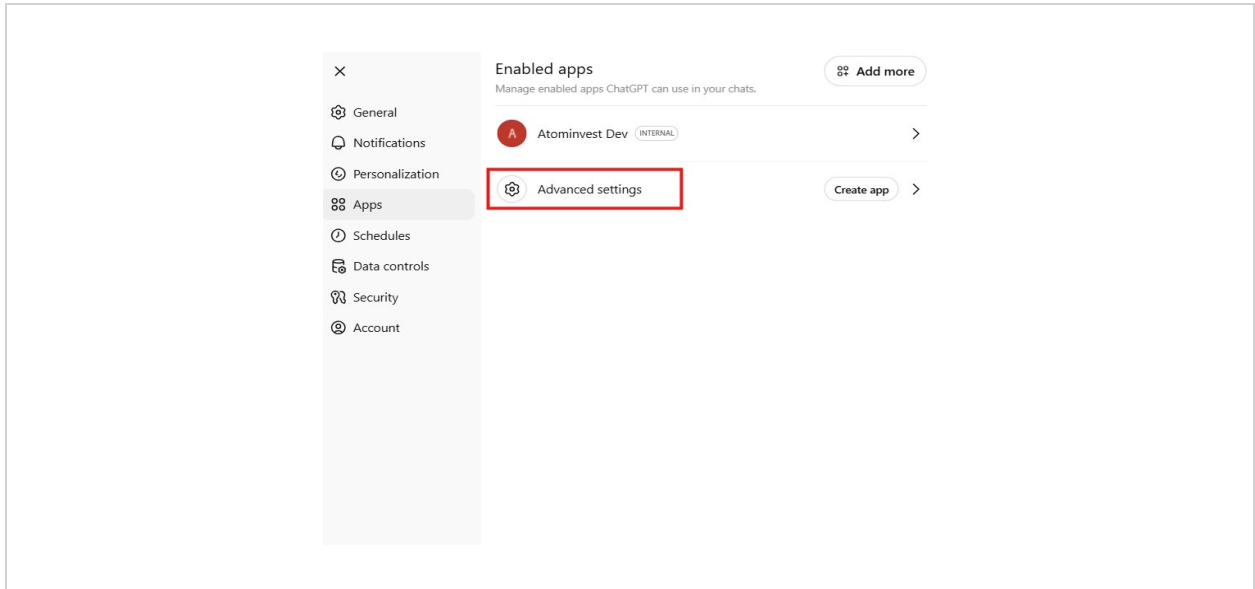
Connecting to the MCP in ChatGPT

Step 1 — Add the connector to your organisation's account

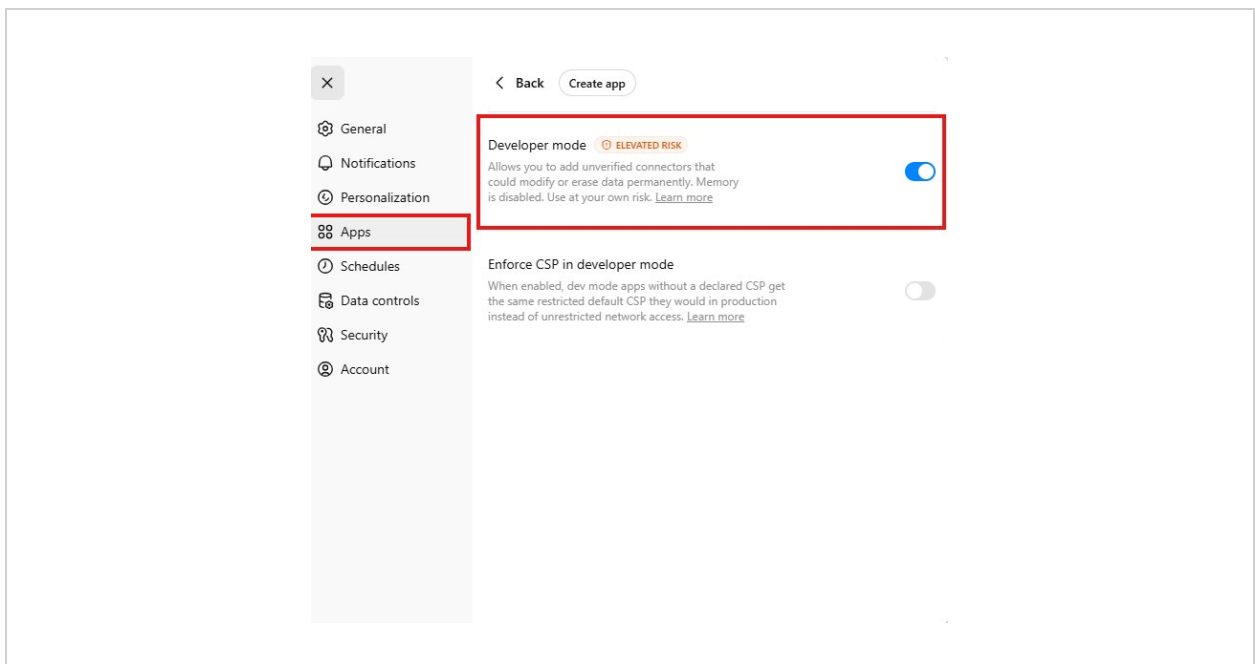


You will need to be a system administrator.

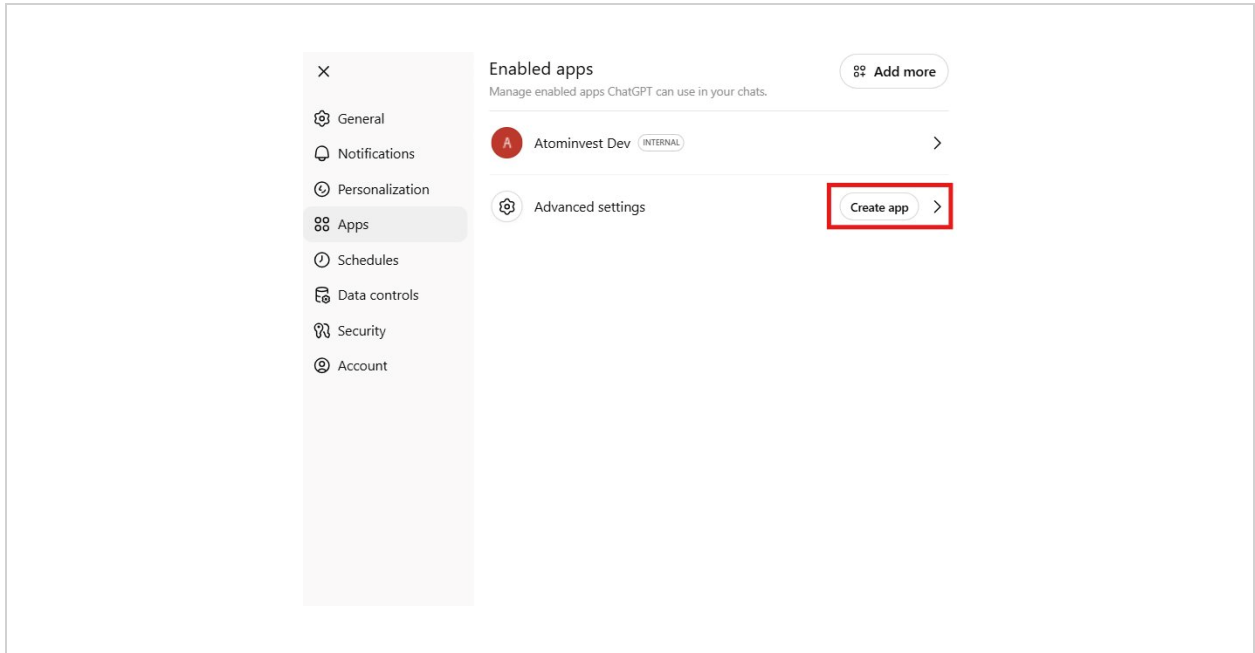
- Click on your account in the bottom right-hand corner of ChatGPT, and navigate to Settings.



- Go to Apps & Connectors > Advanced Settings and enable Developer Mode. This is required to add a custom MCP connector.



7. Return to the Apps screen and click Create App.

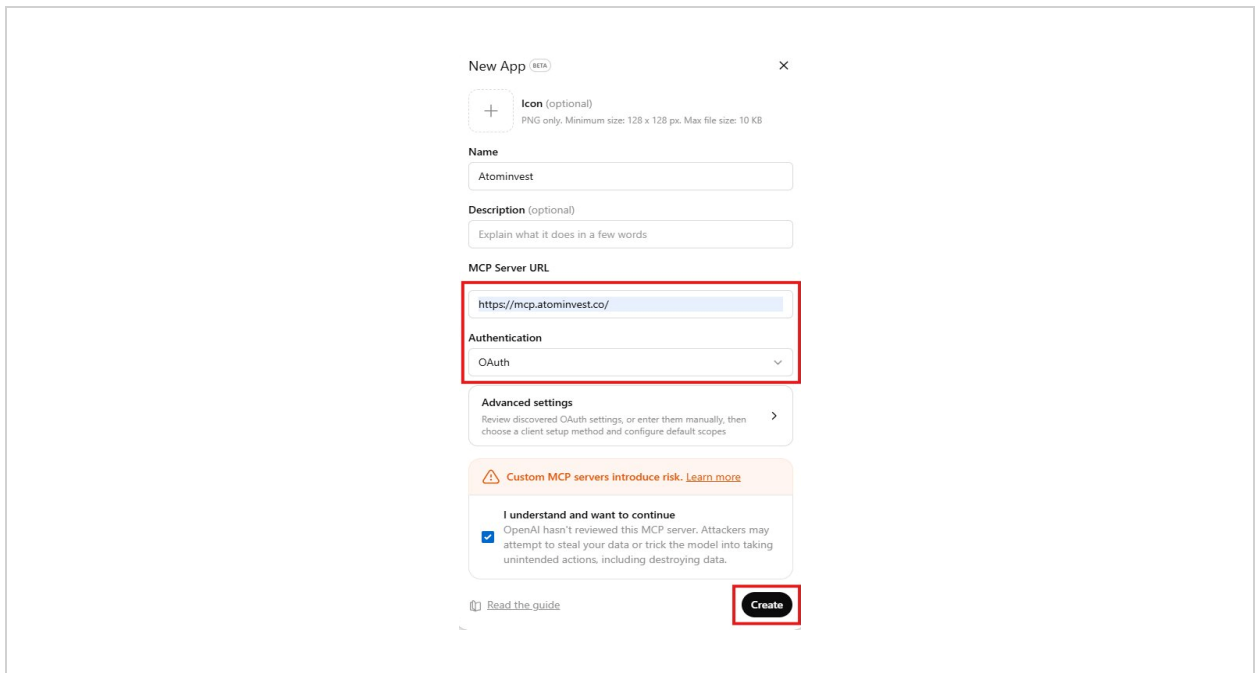


8. Complete the app details in the modal that appears:

- Name: enter a name that will identify the connector to other users in your organisation (e.g. Atominvest).
- Enter the MCP Server URL:

<https://mcp.atominvest.co>

- Authentication: select OAuth.

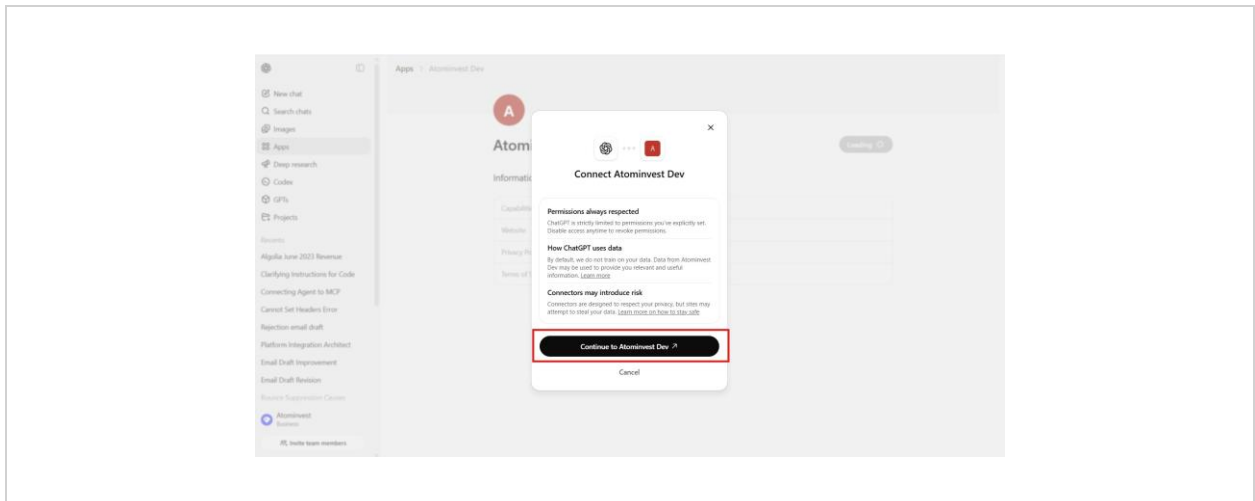


9. Click Create.

Step 2 — Personally connect to the MCP

Once the connector has been created, each user must connect individually.

10. Go to Apps and search for the connector you created. Select it.
11. Click Connect.
12. Click Continue to Atominvest in the confirmation prompt.



13. You will be redirected to the Atominvest MCP authorisation page. Paste your MCP key into the input field and click Authorise.
14. You are now connected. In your first message, reference Atominvest by name to trigger the connector. The AI will continue using it contextually throughout that conversation.

Connecting to the MCP to other LLMs

The connection principle is the same across any LLM platform that supports MCP — generate your key in Atominvest, locate the custom LLM connector or MCP server settings within your chosen tool, and enter the server URL (<https://mcp.atominvest.co>) with OAuth authentication.

If your platform supports MCP connectivity, we recommend attempting the connection using the steps above as a guide. If you encounter any issues or your platform requires a different configuration, please contact your Atominvest Customer Success Manager and we will assist you directly.

3. FAQs

Will users be able to see MCP-related pages without being given explicit access?

The MCP Credentials tab is located under Settings > API & Webhooks. This tab is visible only to users with Super Admin permissions, or users who have Settings Dev enabled and have been granted access to the API tab. Users with Settings Lite will not see this tab.

Do users share a key, or does each person need their own?

Each user should generate and use their own individual MCP key. Keys should not be shared between users. This ensures that access is appropriately scoped and auditable.

What data can I access via the MCP?

The MCP currently provides access to the following:

- **Portfolio Management:** asset, fund, and metric data. Securities and transaction data are not yet available.
- **Investor Relations:** accounts, companies, entities, investments, people, and commitments. Permission sets, reporting, datarooms, document data, and analytics are not accessible via the MCP at this time.
- **Onboarding:** top-level onboarding status only. Individual onboarding steps (KYC, documents signed, funds received) are not yet exposed.

Can I write data back into Atominvest via the MCP?

Not at this time. The MCP is currently read-only data can be queried and extracted from Atominvest, but no data can be pushed back in via the MCP connector.

What happens if I query data the MCP cannot find or does not have access to?

In most cases, the AI will indicate that it cannot find the data you have requested. If you believe you should have access to the data and are not receiving a result, please contact your Atominvest Account or Customer Success Manager.

Can I only see data for the funds I am permissioned to view?

Permission-scoped filtering at the MCP level is not available at this time. If you have concerns about data access controls, please contact your Atominvest Account Manager to discuss your requirements.

Will heavy usage affect my environment's performance?

No. The Atominvest MCP runs on a separate server to your environment. The platform is stress-tested for high-volume requests, so your environment's performance will not be affected by MCP usage.

Can I use MCP to query Investor Management data - such as LP records, onboarding status, or fundraising activity - or is it limited to Portfolio Management?

A separate guide covering MCP for Investor Management — including LP data, onboarding workflows, and fundraising activity — is coming soon. Please reach out to your Customer Success Manager or Account Manager to express interest or learn more.

Where can I get support?

For any issues with the MCP connector, please contact your Atominvest Customer Success Manager.