

# Rogo Acquires Offset to Bring AI Agents into Financial Workflows

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NEW YORK, NY, UNITED STATES, March 13, 2026 /EINPresswire.com/ -- [Rogo](#), the AI platform used by leading financial institutions, today announced the acquisition of [Offset](#), an AI agent company founded by Raj Khare and Shiv Shrivastava. Offset develops learning agents designed to operate directly inside financial workflows across investment banking, private equity, hedge funds, and corporate finance.



With the acquisition, Rogo will integrate Offset's technology into its platform used by more than 25,000 finance professionals, accelerating its roadmap to deliver intelligent systems embedded directly into the tools financial professionals rely on every day.

Financial institutions depend heavily on spreadsheets and presentations to build models, analyze investments, and communicate results. However, maintaining and updating complex financial models remains time-consuming and error-prone. Offset was built to address this challenge by creating AI agents that understand financial models structurally and learn how financial work evolves across assumptions, formulas, and outputs.

Offset's platform focuses on agentic systems that develop memory about how financial models are constructed, updated, and maintained over time. These systems operate directly within financial workflows, allowing analysts and investors to work with AI that understands the underlying structure and logic of financial models rather than simply generating outputs externally.

"Raj, Shiv, and their team bring invaluable technical depth in agentic systems," said Gabe Stengel, CEO and Co-Founder of Rogo. "The foundation of Offset reflects the same belief we have at Rogo. The future of financial workflows will be powered by intelligent systems embedded directly in the tools professionals use every day. We are excited to build together as we continue

expanding our platform.”

“We built Offset around the idea that AI agents should operate directly inside financial workflows, not just generate outputs from the outside,” said Raj Khare, Co-Founder of Offset. “Our focus has been on building an agentic platform that understands financial models structurally and can automate the workflows analysts rely on every day. Integrating this technology into the Rogo platform allows us to bring these systems to financial institutions at scale.”

By bringing Offset into Rogo, the company will combine Offset’s agentic architecture with Rogo’s platform, data integrations, and distribution across global financial institutions.

This acquisition follows Rogo’s recent \$75 million Series C financing led by Sequoia, reinforcing the company’s position as a leading AI platform for finance.

### About Rogo

Rogo is the AI platform for investment banks, private equity firms, and hedge funds. Leading financial institutions including Lazard, Moelis, Nomura, and Tiger Global use Rogo to move faster and operate more efficiently. Rogo’s AI models and agents automate core financial workflows, surface market intelligence, and unify financial data with auditable sourcing. The platform integrates with technology partners and industry data providers including OpenAI, Google Gemini, Anthropic, LSEG, S&P Global, FactSet, and PitchBook. Rogo is backed by investors including Thrive Capital, Khosla Ventures, J.P. Morgan Growth Equity Partners, Tiger Global, and others.

### About Offset

Offset is an AI agent company founded by Raj Khare and Shiv Shrivastava focused on building learning systems that operate inside financial workflows. The company develops agentic systems designed to understand and maintain complex financial models, enabling AI to adapt to the evolving structure of financial analysis and decision-making.

Raj Khare

Offset

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