

OnPointe Software Launches AI Portfolio Analysis Tool, Powered by TacticalMind AI™ Market Consensus Data

Industry-first solution goes far beyond generic LLMs — delivering portfolio insights driven by TacticalMind AI's proprietary market consensus modeling.

FORT MYERS, FL, UNITED STATES, May

13, 2026 /EINPresswire.com/ --

[OnPointe Software](#), a leading provider of investment risk analysis and retirement planning software for financial planning professionals, today announced the launch of its AI

Portfolio Analysis tool — a groundbreaking new offering that gives advisors the ability to fully analyze a client's portfolio and instantly receive a detailed, multi-page report with actionable insights, powered by an exclusive partnership with [TacticalMind AI™](#).

This release is the second major step in OnPointe's expanding AI roadmap, following the company's industry-shifting launch of its AI-powered account statement parser last year. Together, the two tools form an end-to-end intelligent workflow: advisors can upload a client statement, build the portfolio in seconds, and immediately receive a deep analytical breakdown — all without leaving the OnPointe platform. Additional capabilities already in development include AI portfolio construction and AI-driven retirement optimization.

--Not Your Basic Chatbot. Tactical-Grade Market Intelligence--

While much of the financial technology industry has rushed to bolt generic large language models onto legacy software, OnPointe's new portfolio analysis tool takes a fundamentally different approach. Insights are generated against TacticalMind AI's proprietary market consensus data — a sophisticated, multi-model AI framework purpose-built for financial markets — rather than relying on a single general-purpose model trained on the open internet. Advisors receive analysis grounded in real, institutional-grade quantitative signals: sector positioning, risk concentration, factor exposure, and market alignment derived from TacticalMind AI's consensus engine across multiple timeframes.



“The market is flooded with AI tools that are little more than ChatGPT in a financial wrapper. That’s not what advisors need, and it’s not what their clients deserve. We built our portfolio analysis on top of TacticalMind AI’s market consensus data — which is genuinely world-class quantitative AI modeling — so the insights advisors receive are grounded in real market intelligence.”— Rob Harbin, Co-Founder and CTO, OnPointe Software

--Inside the AI Portfolio Analysis Report--

Advisors can run a complete AI-driven portfolio analysis in a single click. Once a client portfolio has been built — either manually or through OnPointe’s AI account statement parser — the new analysis engine evaluates the holdings against TacticalMind AI’s consensus data and returns a multi-page, client-ready report covering:

- Key Metrics & Risk Alignment — historical return, volatility, drawdown, and recovery data, plus a side-by-side comparison of the client’s comfort level against the portfolio’s risk score.
- Portfolio & Performance Analysis — return-vs-risk evaluation against the S&P 500 and a same-risk anchor, full holdings breakdown, and historical performance through major events including the Financial Crisis, COVID, and the 2022 selloff.
- Forward Outlook Across Four Timeframes — 7-day, 30-day, 90-day, and 12-month commentary, each tied to specific TacticalMind AI consensus belief IDs from the live feed.
- Current Market Context — the most material market beliefs from TacticalMind AI’s consensus engine, covering equities, volatility, yields, credit spreads, inflation, geopolitical risk, dollar strength, and liquidity.
- Findings, Guidance & Conclusion — color-coded INFO, WATCH, and ACTION items, prioritized talking points for the next client review, and a plain-English synthesis the advisor can walk a client through.

The result is a portfolio review that previously would have required hours of analyst time — delivered to the advisor in moments, with the depth and rigor of an institutional research process.

--Why It Matters for Advisors--

Independent advisors and wealth professionals are under increasing pressure to deliver sophisticated, data-driven analysis at scale — without the staff or budget of an institutional shop. OnPointe’s AI Portfolio Analysis levels the playing field, putting the analytical horsepower of a quantitative research team into the hands of every advisor on the platform. Combined with the company’s AI-powered account statement parser, OnPointe now offers what is believed to be the financial planning industry’s first true end-to-end AI workflow: from raw PDF statement to fully analyzed, consensus-grounded portfolio review in minutes. With AI portfolio construction, AI retirement optimization, and additional intelligent tools already in development, OnPointe is building the most comprehensive AI-driven advisor platform in the market.

--About OnPointe Software--

OnPointe Software empowers financial advisors and wealth professionals with market-calibrated investment risk analysis, dynamic retirement income planning, and AI-driven portfolio

construction and analysis. Learn more at <https://onpointesoftware.com>

--About TacticalMind AI™--

TacticalMind AI™ is a next-generation AI-driven market analysis and strategy execution platform that produces proprietary market consensus data through a sophisticated multi-model architecture. Purpose-built for financial markets, TacticalMind AI™ delivers institutional-grade quantitative intelligence that powers advisor-facing applications, signal generation, and strategy execution. Learn more at <https://tacticalmind.ai>

Lauren DeFrancesco

OnPointe Software

+1 269-325-1998

[email us here](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/912330988>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.