

# Commercial Due Diligence Is Changing in the Age of AI

*Cohres examines how AI is reshaping commercial due diligence, investment research workflows, and the role of human judgment.*

LONDON, UNITED KINGDOM, June 29, 2026 /EINPresswire.com/ -- For decades, commercial due diligence has been constrained by information gathering. Teams spent significant time collecting market data, researching competitors, reviewing documents, validating assumptions, and building investment cases.



Commercial due diligence is evolving as AI accelerates research while human judgment remains central to investment decision-making.

AI is beginning to change that reality.

Information that once required days or weeks of effort can increasingly be gathered, organized, and synthesized in hours. Yet while AI is accelerating research capacity, it is not eliminating the need for commercial due diligence. In many ways, it is making the most important aspects of due diligence even more valuable.

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Commercial due diligence is becoming less about information gathering and more about assumption testing, risk assessment, and investment judgment.”

*Daniel Nikic, Managing Partner, Cohres*

As information becomes easier to access, differentiation increasingly comes from interpretation, judgment, and the ability to convert information into conviction.

Cohres, an investment research and commercial due diligence firm, believes commercial due diligence in the age of AI is shifting from information gathering toward

assumption testing, risk assessment, and investment judgment.

Commercial Due Diligence Is Becoming More Important, Not Less

Commercial due diligence is becoming increasingly important as markets become more complex

and competitive dynamics evolve faster than in previous decades.

AI, software, legal technology, infrastructure platforms, and emerging technologies are creating new opportunities, but they are also introducing new forms of uncertainty. New entrants can emerge quickly, competitive advantages can erode faster, and market leadership can change in relatively short periods of time.

While more information is available than ever before, information alone does not reduce uncertainty. In many cases, the abundance of information can make it more difficult to determine which factors truly matter.

Investors still need to understand market structure, competitive positioning, customer adoption dynamics, execution risk, pricing power, and long-term sustainability. As a result, commercial due diligence is becoming more important, not less, in the age of AI.

### What AI Improves In Commercial Due Diligence

In commercial due diligence, AI is most useful when it improves the speed and structure of research without replacing the judgment required to interpret it.

AI can help research teams identify competitors, organize fragmented information, map market categories, summarize reports, extract recurring themes, and monitor developments such as funding activity, news, and market movement. This improves research preparation and allows teams to spend less time assembling information and more time testing whether the information supports the investment thesis.

### What AI Still Cannot Replace

Despite AI being able to monitor, research, and synthesize information it cannot determine what matters, what deserves attention and what should drive capital allocation.

AI can support research, but it does not create investment conviction. Conviction comes from determining which assumptions matter most, testing those assumptions under uncertainty, and deciding whether the evidence is strong enough to support capital allocation.

Investors need to test whether the market is structurally attractive, whether customer adoption is repeatable, whether pricing power is real, whether competitive positioning is durable, and whether management can execute against the investment case. AI can accelerate research around these questions, but it cannot determine which assumptions should ultimately drive conviction.

In commercial due diligence, outcomes are often determined by a small number of critical assumptions relating to market growth, customer adoption, competitive positioning, pricing power, or execution capability.

AI can identify information related to these assumptions, but it cannot reliably determine which assumptions deserve the greatest scrutiny.

Identifying, challenging, and validating critical assumptions remains fundamentally a human exercise.

Commercial due diligence is not ultimately an information problem. It is a decision-making problem.

## Commercial Due Diligence Is Becoming A Workflow Problem

Prior to AI, competitive advantages in commercial due diligence often came from access to information, research resources, and analyst capacity.

A structured commercial due diligence workflow should move from market mapping to assumption identification, risk testing, evidence review, and investment committee readiness.

The goal is not simply to produce more research, but to ensure that the most important assumptions are tested consistently across opportunities.

As information becomes commoditized, workflow design becomes increasingly strategic.

As AI becomes more accessible, differentiation increasingly comes from how organizations integrate AI into investment research workflows and decision-making processes.

Increasingly, the advantage does not come from having access to information that others cannot find. The advantage comes from building repeatable systems that consistently evaluate opportunities using structured frameworks.

Cohres' perspective is that commercial due diligence workflows should help investors move from information gathering to assumption testing, risk assessment, and investment judgment. This is where workflow infrastructure becomes strategically important.

## The Cohres Perspective

Cohres has observed that information gathering is becoming easier while investment decision-making remains difficult.

The challenge is increasingly less about obtaining information and more about determining what matters, identifying key risks, testing assumptions, and supporting better decisions.

Cohres has observed that structured workflows often have a greater impact on research quality than the volume of information available to decision makers.

This perspective has informed Cohres' development of [AI Concierge Systems for Investors](#), [commercial due diligence frameworks](#), and [AI-supported investment research workflows](#) designed to improve research capacity while preserving human judgment.

Cohres' AI Concierge Systems for Investors are designed to support this type of structured investment research workflow by organizing market intelligence, preserving institutional knowledge, and helping investors move from information gathering to decision support.

In Cohres' view, the future of commercial due diligence will be defined by firms that combine AI-supported research, disciplined workflows, and human judgment.

AI will continue to transform commercial due diligence by accelerating research, improving access to information, and increasing analytical capacity.

However, the most important elements of due diligence remain fundamentally human.

Conviction, judgment, assumption testing, and strategic interpretation cannot be automated in the same way that information gathering can.

The firms that benefit most from AI will not be those that simply adopt new tools. They will be those that develop repeatable commercial due diligence workflows capable of combining AI-supported research, market intelligence, and human judgment.

For investors, the advantage will increasingly come from combining faster research, disciplined

workflows, and better judgment. In Cohres' view, the future of commercial due diligence will be defined by AI-supported workflows that improve research capacity while keeping human judgment at the center of investment decision-making.

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