



CB Insights Brings Private Market Intelligence to Microsoft 365 Copilot and Copilot in Excel

Official Microsoft connector brings CB Insights' trusted intelligence on private companies directly into AI-powered enterprise workflows.

NEW YORK, NY, UNITED STATES, June 25, 2026 /EINPresswire.com/ -- CB Insights, the leader in predictive intelligence on private companies, today announced the availability of its trusted data and insights through Microsoft 365 Copilot Chat, Researcher agent, Copilot in Excel and Copilot Cowork. Available as an official Microsoft connector powered by Model Context Protocol, or MCP, the integration brings CB Insights' trusted intelligence on private companies directly into AI-powered enterprise workflows, helping clients move faster from market monitoring and company sourcing to strategy, investment, partnership, and deal decisions.

"Making CB Insights available in Microsoft 365 Copilot and Copilot in Excel is an important step in our strategy to bring trusted private market intelligence directly into the workflows our clients use every day," said Karl Kong, CEO at CB Insights. "With this connector, clients can ask questions in natural language, retrieve CB Insights data live at query time, and bring relevant company and market intelligence into Excel without switching tools or stitching together data from multiple systems."

Through a single, governed interface, the CB Insights MCP connector brings CB Insights' proprietary intelligence, including private company data, market maps, emerging technology trends, funding and deal activity, investor insights, competitive intelligence, and analyst research into Copilot. Because the connector queries CB Insights when a request is made, responses can reflect the latest available data, helping teams work with current market signals directly in the Microsoft tools where analysis, modeling, and decision-making already happen.

"Our collaboration with CB Insights shows how Microsoft is bringing high-value, domain-specific intelligence directly into the flow of work," said Brian Jones, Vice President, Microsoft Excel. "By integrating CB Insights' trusted private market intelligence into Microsoft 365 Copilot and Copilot in Excel, we are helping customers accelerate analysis, uncover opportunities, and move more quickly from insight to action."

In Copilot, users can now connect to CB Insights with their provider credentials and turn the CB Insights source on. From there, when a prompt specifies CB Insights or references relevant private market data — such as companies, investors, funding activity, market landscapes, or

emerging technologies — Copilot can retrieve the appropriate CB Insights data, which is vetted, verified and structured for LLM consumption, and seamlessly incorporate it into an AI response or an Excel sheet.

The connector enables teams to use Microsoft 365 Copilot to ask questions about companies, markets, technologies, investors, competitors, and emerging trends, and to bring relevant CB Insights data into Copilot in Excel for deeper analysis, modeling, reporting, and collaboration. Clients can accelerate workflows such as market landscape analysis, company screening, competitive monitoring, innovation scouting, partner identification, and investment research from within the Microsoft tools they already use.

“Private market intelligence is most valuable when it is available at the moment decisions are being made,” added Kong. “By integrating CB Insights with Microsoft 365 Copilot and Copilot in Excel, clients can put trusted market signals, company data, and research into the hands of more teams, faster.”

CB Insights for Microsoft 365 Copilot and Copilot in Excel is available through a Bring Your Own License model, with customers licensing CB Insights directly. To learn more about the CB Insights Microsoft 365 Copilot and Copilot in Excel connector, visit www.cbinsights.com.

About CB Insights

CB Insights is the leader in predictive intelligence on private companies—turning exclusive data on millions of firms into early, trusted signals on future performance and direction. The company pioneered predictive intelligence with its Mosaic Score—the first system to reliably forecast the outlook for a private company—and has since built it into a comprehensive platform of AI and data capabilities. Today, leading strategy, investment, and business development teams rely on CB Insights to identify the right companies, markets, and opportunities before their competitors do. Visit www.cbinsights.com for more information.

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