

S2 Strategy launches new Data Agent combined with Orrigo AI, an agentic AI platform for marketers at investment firms

Orrigo AI enables marketers at investment management firms to complete their end-to-end workflows via a library of purpose-built AI marketing agents.



SAN FRANCISCO, CA, UNITED STATES,
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S2 Strategy, Inc announced today the release of [Orrigo AI](#), an agentic AI platform that enables marketers at asset and investment management firms to complete their day-to-day end-to-end workflows more productively and compliantly via a library of purpose-built AI marketing agents.

“

Orrigo understands our investment management business and what makes our firm different.”

Stephen Lee, Principal, Logan Capital

S2 Strategy first gained traction in 2025 with a patented RFP Agent named AdviserGPT. No more digging through prior RFPs or word templates to copy/paste. No more uploading and downloading RFPs from a content library that requires a full-time content manager. Just open a new RFP in Word or Excel, launch the plug-in, and bulk answer with your firm’s compliance-approved language.

Today AdviserGPT is rebranding to Orrigo AI, and releasing

our second agent for asset management marketers, our Data Agent. The new Data Agent streamlines portfolio and strategy updates for recurring, data-intensive Due Diligence Questionnaires with quarterly performance data from a firm’s portfolio accounting/reporting, attribution, and consultant database datastores. The Data Agent joins a library of agents purpose-built for marketers including the RFP Agent, a Drafts Agent for client communications including proposals and portfolio commentary, and a series of Vault Agents that autonomously manage a firm’s compliance-approved content including identifying question/answer duplicates, propagating firm updates, and archiving outdated content. No more pouring through documents, questions, and answers to keep your library up-to-date.

Brian Stone, Co-Founder & CEO, Orrigo AI, said, "The firms using AdviserGPT the past 18 months

have seen what AI can do for their RFP marketing writers. Now they want more than RFP automation including accelerating data-heavy DDQ updates with their standard quarterly data. The firms leaning into compliance-driven, AI-native marketing will outperform the ones that stick with legacy content management tools and proprietary web portal AI add-ons."

How Orrigo AI Works

Most asset management marketers live in a continual, arduous state of control-tab and copy-paste across prior documents and web-based DDQ portals. Orrigo AI brings a firm's compliance-approved narrative content plus proprietary strategy data into one AI-enabled, segregated, data-encrypted system with a series of plug-ins for doing work where it often originates in Microsoft Word, Excel and via Chrome/Edge browsers.

Orrigo utilizes AI to one-button onboard a firm's 'prior art' completed questionnaires, insights documents and even presentations from Microsoft Word to Excel to Adobe PDF documents. Onboarding content has been a giant, decades-old pain point in horizontal RFP tools and online DDQ portals. Orrigo also one-button onboards a firm's existing quarterly data files from leading consultant database distribution and portfolio attribution providers. It also can incorporate prior commentary and market insights, investment research, and AI-native client meeting notes.

All of this information makes up a firm's Vault of compliance-approved language and data. Orrigo uses intelligent agents to reproduce the right content and now data in your firm's tone of voice while surfacing a patented Trust Score to ensure no hallucinations slip through.

"The Orrigo suite of AI agents with workflows for RFPs, DDQs, Commentary and Proposals, is one place, one marketing system to complete questionnaires and to draft compliance-approved marketing content and commentary instead of trying to figure out where or how best to generate something. Orrigo understands our investment management business and what makes our firm different," said Stephen Lee, Principal [Logan Capital Management](#).

Compliance

Every answer or content item generated by Orrigo includes our Trust Score with similarity matching to indicate how close it is to the compliance-approved language in a firm's Vault. In [comparisons with frontier models](#) and horizontal RFP vendor solutions, we found hallucinations and expanded risk rates can be up to 4X higher without a compliance-first approach to leveraging AI.

"For AI to deliver meaningful results in investment management, it must be built on trusted, well-governed data. At IMSS, we've spent years helping asset managers maintain accurate consultant database and due diligence information, so we appreciate solutions like Orrigo AI that extend the value of that data into compliant, AI-driven marketing and client servicing workflows." said Patricia O'Donnell, Founder & CEO, IMSS.

Orrigo is in the certification process for SOC 2 with planned completion this year.

Availability

Orrigo AI is available to all investment management firms via either our Emerging, Professional, or Enterprise versions. The Data Agent is currently available via a waitlist. Learn more at www.orrigo.ai.

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