DynamoAI MCP Connector

A Headless Approach:

Connect Dynamo to Your Enterprise AI Tools with the Dynamo's MCP Connector

DynamoAI offers a robust product suite with substantial built-in AI capabilities, all within our intelligent v3.0 platform interface. Now, with our MCP Connector, Dynamo Software's clients can expand their canvas (and go "headless") by working directly from **their own environment**. This empowers clients to bring Dynamo data directly into their own enterprise environment, as well as use our growing pre-built AI features* available via MCP. Using Claude, ChatGPT, or other approved AI tools, your team can ask questions, explore insights, and act on your investment data without leaving the internal tools and skills built within your own environment.

Let's explore what DynamoAI includes, what the MCP Connector does, and how the pricing works.

Why A Headless Approach?

Investment teams spend hours moving between systems: pulling reports, copying figures, and manually feeding context into their own enterprise AI tools. That work can be slow and error-prone. Dynamo's MCP Connector closes that gap. It securely links your Dynamo platform to the AI assistants your investment firm relies on, so you can interact with your deal pipelines, portfolio data, investor records, and research from a single conversation. All of this is grounded in your own trusted data.

10 Key Headless Capabilities

MCP (Model Context Protocol) is an open standard that lets AI tools connect to external data sources, like Dynamo, in a secure, structured way. Dynamo's MCP Connector applies that standard to your Dynamo environment. Once connected, users can interact with Dynamo data directly through your enterprise's ChatGPT, Claude, and other supported AI tools. Users can also continue to leverage a broad range of DynamoAI tools and capabilities that are an integral part of the Dynamo platform.

You keep using your own enterprise AI tools within your environment.

The MCP Connector simply gives your AI tools a secure line into Dynamo.

Specific Activities Include:

1. **Direct data access** | Claude, ChatGPT, and compatible enterprise AI tools can read your permissioned Dynamo data in real time.
2. **Grounded answers** | AI responses draw from your actual CRM, deal, portfolio, and research records, not generic web content.
3. **Built-in Dynamo LLM skills** | Users can call pre-existing Dynamo LLM skills directly, extending the experience beyond raw data retrieval to Dynamo specific prompts, workflows, and intelligence.
4. **Secure by design** | Access respects your existing Dynamo permissions and security controls, so users only see what they're authorized to see.
5. **No manual exports** | Skip the copy-paste. Ask a question and get an answer built on current data.
6. **Schema and field lookups** | Query entity fields, data schemas, and valid lookup values directly from your AI interface.
7. **Flexible record retrieval** | Search and retrieve single records, batch results, or filtered datasets without leaving your AI tool.
8. **Audit trail and document access** | Pull audit history and document content on demand for due diligence and compliance workflows.
9. **Report queries** | Run financial queries against your tabular models to surface analytics within your AI conversation.
10. **Full entity management** | Create, edit, delete, and relate entities with built-in confirmation prompts before any write action is executed.

Security, Governance, & Controlled Data Access

All access through Dynamo's MCP Connector is governed by your firm's existing Dynamo permissions framework. Users can only connect to data they're already authorized to access, nothing more. Sensitive records remain protected by the same role-based controls your team has configured within Dynamo, helping ensure that AI-powered access works within your established data governance policies rather than around them. It's worth noting that Dynamo permissions govern how the connector accesses your data. Any data handled by your selected AI tool is also subject to that tool's own security and governance settings, so we recommend reviewing those alongside your Dynamo configuration. For write operations, the connector enforces an additional layer of control: any action to create, edit, delete, or relate an entity requires explicit confirmation before it is executed. This safeguard ensures that AI-assisted workflows remain auditable and that no unintended changes are made to your data, to reduce the risk of unintended changes to your data, even when operating at speed.

The DynamoAI Product Suite

The MCP Connector is one component of the broader DynamoAI product suite, an integrated set of AI capabilities built for the alternative investments workflow. Selected items include:

1 **Workflow logic automation*** | AI-driven task management and data classification that reduce manual operations.
2 **Intelligent search and summarization** | Fast retrieval and synthesis across your research, deal, and investor data.
3 **AI-assisted data extraction** | Automated document and data capture from manager reports, questionnaires, and GP materials.
4 **MCP Connector** | Secure data access for enterprise AI tools.

Together, these capabilities are built to eliminate manual data work and free your team to focus on higher-value investment workflow tasks.

The Pricing Model

Dynamo LLM usage, whether accessed in-product or utilized via our MCP Connector, is included up to the annual capacity associated with the DynamoAI minimum platform fee.

The MCP Connector is for clients wanting to securely interact with their Dynamo data via MCP using their own preferred AI tools, as well as use our growing pre-built AI tools* available via MCP. The DynamoAI platform fee includes access for clients to securely interact with their Dynamo data using their preferred AI solution through MCP.

For details on the specific capacity, entitlements, and features available to your firm, please refer to your Order Form and the applicable product documentation.

Why it's a Package, Not a Standalone Connector

DynamoAI delivers the most value when it operates on data that is clean, current, and well-structured… and this includes extending access through the MCP Connector as well.

- The MCP Connector provides secure access by enabling clients to leverage Dynamo-powered AI skills,* and to access their underlying data, such as document content, entities, entity properties, DAX data, look-up values, and search entities. Of course, clients can create, retrieve, update, delete, and relate entities.
- DynamoAI is a strong fit for investment firms that:
  - Already use Claude, ChatGPT, or another enterprise AI tool.
  - Want AI answers within their own enterprise environment.
  - Need their own enterprise-grade security and permission controls.

Frequently Asked Questions

Does the MCP Connector work with Claude and ChatGPT?
Yes. The MCP Connector supports Claude, ChatGPT, and other enterprise AI tools that adopt the Model Context Protocol standard.

Do I need to have a Dynamo license to access the MCP Connector?
Yes. A Dynamo license is required to authenticate user credentials and access your Dynamo instance.

Is my data secure?
Yes. Access follows your existing Dynamo permissions and security controls. Users only see the data they're authorized to access.

What does the DynamoAI Package include?
A full suite of in-product AI-embedded agents and workflows across the Dynamo Platform and the MCP Connector.

Dynamo SOFTWARE

*Some availability details are forward-looking and planned for upcoming Dynamo releases.

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